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SOUTHERN CALIFORNIA
ASSOCIATION OF GOVERNMENTS
900 Wilshire Blvd., Ste. 1700
Los Angeles, CA 90017
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www.scag.ca.gov

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Community, Economic & Human Development
Jorge Marquez, Covina

Energy & Environment
David Pollock, Moorpark

Transportation
Art Brown, Buena Park

HYBRID (IN-PERSON & REMOTE PARTICIPATION) *

COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE

*In-Person & Remote Participation**
Thursday, April 7, 2022
9:30 a.m. – 11:30 a.m.

Public Participation: The SCAG offices are currently closed to members of the public. Please see next page for detailed instructions on how to participate in the meeting.

To Attend and Participate on Your Computer:
https://scag.zoom.us/j/116153109

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Call-in Number: 1-669-900-6833
Meeting ID: 116 153 109

PUBLIC ADVISORY

Given the declared state of emergency (pursuant to State of Emergency Proclamation dated March 4, 2020) and local public health directives imposing and recommending social distancing measures due to the threat of COVID-19, and pursuant to Government Code Section 54953(e)(1)(A), the meeting will be held telephonically and electronically.

If members of the public wish to review the attachments or have any questions on any of the agenda items, please contact Maggie Aguilar at (213) 630-1420 or via email at aguilarm@scag.ca.gov. Agendas & Minutes are also available at: www.scag.ca.gov/committees.

SCAG, in accordance with the Americans with Disabilities Act (ADA), will accommodate persons who require a modification of accommodation in order to participate in this meeting. SCAG is also committed to helping people with limited proficiency in the English language access the agency's essential public information and services. You can request such assistance by calling (213) 630-1420. We request at least 72 hours (three days) notice to provide reasonable accommodations and will make every effort to arrange for assistance as soon as possible.

Instructions for Public Comments

You may submit public comments in two (2) ways:

1. **In Writing:** Submit written comments via email to: CEHDPublicComment@scag.ca.gov **by 5pm on Wednesday, April 6, 2022.** You are **not** required to submit public comments in writing or in advance of the meeting; this option is offered as a convenience should you desire not to provide comments in real time as described below.

   All written comments received after 5pm on Wednesday, April 6, 2022, will be announced and included as part of the official record of the meeting.

2. **In Real Time:** If participating in real time via Zoom or phone, during the Public Comment Period (Matters Not on the Agenda) or at the time the item on the agenda for which you wish to speak is called, use the "raise hand" function on your computer or *9 by phone and wait for SCAG staff to announce your name/phone number. SCAG staff will unmute your line when it is your turn to speak. Limit oral comments to 3 minutes, or as otherwise directed by the presiding officer. For purpose of providing public comment for items listed on the Consent Calendar, please indicate that you wish to speak when the Consent Calendar is called; items listed on the Consent Calendar will be acted on with one motion and there will be no separate discussion of these items unless a member of the legislative body so requests, in which event, the item will be considered separately.

   If unable to connect by Zoom or phone and you wish to make a comment, you may submit written comments via email to: CEHDPublicComment@scag.ca.gov.

In accordance with SCAG's Regional Council Policy, Article VI, Section H and California Government Code Section 54957.9, if a SCAG meeting is "willfully interrupted" and the "orderly conduct of the meeting" becomes unfeasible, the presiding officer or the Chair of the legislative body may order the removal of the individuals who are disrupting the meeting.

Instructions for Participating in the Meeting

SCAG is providing multiple options to view or participate in the meeting:

To Participate and Provide Verbal Comments on Your Computer

1. Click the following link: https://scag.zoom.us/j/116153109
2. If Zoom is not already installed on your computer, click "Download & Run Zoom" on the launch page and press "Run" when prompted by your browser. If Zoom has previously been installed on your computer, please allow a few moments for the application to launch automatically.
3. Select "Join Audio via Computer."
4. The virtual conference room will open. If you receive a message reading, "Please wait for the host to start this meeting," simply remain in the room until the meeting begins.
5. During the Public Comment Period, use the "raise hand" function located in the participants' window and wait for SCAG staff to announce your name. SCAG staff will unmute your line when it is your turn to speak. Limit oral comments to 3 minutes, or as otherwise directed by the presiding officer.

To Listen and Provide Verbal Comments by Phone

1. Call **(669) 900-6833** to access the conference room. Given high call volumes recently experienced by Zoom, please continue dialing until you connect successfully.
2. Enter the **Meeting ID: 116 153 109**, followed by **#**.
3. Indicate that you are a participant by pressing **#** to continue.
4. You will hear audio of the meeting in progress. Remain on the line if the meeting has not yet started.
5. During the Public Comment Period, press *9 to add yourself to the queue and wait for SCAG staff to announce your name/phone number. SCAG staff will unmute your line when it is your turn to speak. Limit oral comments to 3 minutes, or as otherwise directed by the presiding officer.

CEHD - Community, Economic and Human Development Committee
Members – April 2022

1. **Hon. Jorge Marquez**
CEHD Chair, Covina, RC District 33

2. **Hon. Frank A. Yokoyama**
CEHD Vice Chair, Cerritos, RC District 23

3. **Hon. Adele Andrade-Stadler**
Alhambra, RC District 34

4. **Hon. Al Austin**
Long Beach, GCCOG

5. **Hon. David Avila**
Yucaipa, SBCTA

6. **Hon. Megan Beaman-Jacinto**
Coachella, RC District 66

7. **Hon. Drew Boyles**
El Segundo, RC District 40

8. **Hon. Wendy Bucknum**
Mission Viejo, RC District 13

9. **Hon. Juan Carrillo**
Palmdale, RC District 43

10. **Hon. Ramon Castro**
Imperial County CoC

11. **Hon. Letitia Clark**
Tustin, RC District 17

12. **Hon. Paula Devine**
Glendale, RC District 42

13. **Hon. Steve DeRuse**
La Mirada, RC District 31

14. **Hon. Diane Dixon**
Newport Beach, RC District 15

15. **Hon. Debra Dorst-Porada**
Ontario, Pres. Appt. (Member at Large)

OUR MISSION
To foster innovative regional solutions that improve the lives of Southern Californians through inclusive collaboration, visionary planning, regional advocacy, information sharing, and promoting best practices.

OUR VISION
Southern California's Catalyst for a Brighter Future

OUR CORE VALUES
Be Open | Lead by Example | Make an Impact | Be Courageous

16. Hon. Rose Espinoza
La Habra, OCCOG

17. Hon. Waymond Fermon
Indio, CVAG

18. Hon. Margaret Finlay
Duarte, RC District 35

19. Hon. Alex Fisch
Culver City, RC District 41

20. Hon. Mark Henderson
Gardena, RC District 28

21. Hon. Peggy Huang
TCA Representative

22. Hon. Cecilia Hupp
Brea, OCCOG

23. Hon. Kathleen Kelly
Palm Desert, RC District 2

24. Sup. Matt LaVere
Ventura County CoC

25. Hon. Tammy Kim
Irvine, RC District 14

26. Hon. Jed Leano
Claremont, SGVCOG

27. Hon. Patricia Lock Dawson
Riverside, RC District 68

28. Hon. Anni Marshall
Avalon, GCCOG

29. Hon. Andrew Masiel
Tribal Govt Regl Planning Board Representative

30. Hon. Lauren Meister
West Hollywood, WSCCOG

31. Hon. Bill Miranda
Santa Clarita, SFVCOG

32. Hon. John Mirisch
Beverly Hills, Pres. Appt. (Member at Large)

33. George Nava
Brawley, ICTC

34. Hon. Marisela Nava
Perris, RC District 69

35. Hon. Kim Nguyen
Garden Grove, RC District 18

36. Hon. Trevor O'Neil
Anaheim, RC District 19

37. Hon. Ed Paget
Needles, SBCTA

38. Hon. Sunny Park
Buena Park, OCCOG

39. Hon. Ariel Pe
Lakewood, GCCOG

40. Hon. Misty Perez
Port Hueneme, Pres. Appt. (Member at Large)

41. Hon. Michael Posey
Huntington Beach, RC District 64

42. Hon. Nithya Raman
Los Angeles, RC District 51

43. Hon. Gabriel Reyes
San Bernardino County CoC

44. Hon. Rex Richardson
Imm. Past President, Long Beach, RC District 29

45. Hon. Sonny Santa Ines
Bellflower, GCCOG

46. Hon. Nicholas Schultz
Burbank, AVCJPA

47. Hon. David J. Shapiro
Calabasas, RC District 44

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Monrovia, SGVCOG

49. Hon. Andy Sobel
Santa Paula, VCOG

50. Hon. Wes Speake
Corona, WRCOG

51. Hon. Mark Waronek
Lomita, SBCCOG

52. Hon. Acquanetta Warren
Fontana, SBCTA

53. Hon. Christi White
Murrieta, WRCOG

54. Hon. Tony Wu
West Covina, SGVCOG

55. Hon. Frank Zerunyan
Rolling Hills Estates, SBCCOG

COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE AGENDA

Southern California Association of Governments
Hybrid (In-Person and Remote Participation)
900 Wilshire Boulevard, Suite 1700 - Policy B Meeting Room
Los Angeles, CA 90017
Thursday, April 7, 2022
9:30 AM

The Community, Economic and Human Development Committee may consider and act upon any of the items on the agenda regardless of whether they are listed as Information or Action items.

CALL TO ORDER AND PLEDGE OF ALLEGIANCE
(The Honorable Jorge Marquez, Chair)

PUBLIC COMMENT PERIOD (Matters Not on the Agenda)
This is the time for persons to comment on any matter pertinent to SCAG's jurisdiction that is *not* listed on the agenda. Although the committee may briefly respond to statements or questions, under state law, matters presented under this item cannot be discussed or acted upon at this time. Public comment for items listed on the agenda will be taken separately as further described below.

General information for all public comments: Members of the public are encouraged, but not required, to submit written comments by sending an email to: CEHDPublicComment@scag.ca.gov by 5pm on Wednesday, April 6, 2022. Such comments will be transmitted to members of the legislative body and posted on SCAG's website prior to the meeting. Any writings or documents provided to a majority of the Community, Economic and Human Development Committee regarding any item on this agenda (other than writings legally exempt from public disclosure) are available at the Office of the Clerk, located at 900 Wilshire Blvd., Suite 1700, Los Angeles, CA 90017 during normal business hours and/or by contacting the office by phone, (213) 630-1420, or email to aguilarm@scag.ca.gov. Written comments received after 5pm on Wednesday, April 6, 2022, will be announced and included as part of the official record of the meeting. Members of the public wishing to verbally address the Community, Economic and Human Development Committee in real time during the meeting will be allowed up to a total of 3 minutes to speak on items on the agenda, with the presiding officer retaining discretion to adjust time limits as necessary to ensure efficient and orderly conduct of the meeting. The presiding officer has the discretion to equally reduce the time limit of all speakers based upon the number of comments received. If you desire to speak on an item listed on the agenda, please wait for the chair to call the item and then indicate your interest in offering public comment by either using the "raise hand" function on your computer or pressing *9 on your telephone. For purpose of providing public comment for items listed on the Consent Calendar (if there is a Consent Calendar), please indicate that you wish to speak when the Consent Calendar is called; items listed on the Consent Calendar will be acted upon with one motion and there will be no separate discussion of these items unless a member of the legislative body so requests, in which event, the item will be considered separately.

REVIEW AND PRIORITIZE AGENDA ITEMS

ELECTION OF CEHD CHAIR AND VICE CHAIR

CONSENT CALENDAR

Approval Items

1. Minutes of the Meeting – March 3, 2022

Receive and File

2. Equity Analysis Approach (formerly Environmental Justice Analysis)

3. Draft 2022 South Coast Air Quality Management Plan (AQMP)

4. Racial Equity Early Action Plan – FY22 Progress Report

INFORMATION ITEMS

5. Presentation on Chan Zuckerberg's Initiative's Housing Narrative Research   40 Mins.
(Jenna Hornstock, Deputy Director of Planning, Land Use)

6. Policy Development Framework for Connect SoCal 2024   15 Mins.
(Jenna Hornstock, Deputy Director of Planning, Land Use)

CHAIR'S REPORT
(The Honorable Jorge Marquez, Chair)

STAFF REPORT
(Jonathan Hughes, Regional Affairs Officer, SCAG Staff)

FUTURE AGENDA ITEMS

ANNOUNCEMENTS

ADJOURNMENT

Southern California Association of Governments

MINUTES OF THE REGULAR MEETING
COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE (CEHD)
THURSDAY, MARCH 3, 2022

THE FOLLOWING MINUTES ARE A SUMMARY OF ACTIONS TAKEN BY THE COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE (CEHD). A VIDEO AND AUDIO RECORDING OF THE FULL MEETING IS AVAILABLE AT: http://scag.iqm2.com/Citizens/.

The Community, Human and Development Committee (CEHD) of the Southern California Association of Governments (SCAG) held its regular meeting both in person and virtually (telephonically and electronically), given the declared state of emergency (pursuant to State of Emergency Proclamation dated March 4, 2020) and local public health directives imposing and recommending social distancing measures due to the threat of COVID-19, and pursuant to Government Code Section 54953(e)(1)(A). A quorum was present.

Members Present:

Hon. Jorge Marquez, Chair	*Covina*	**RC District 33**
Hon. Frank Yokoyama, Vice Chair	*Cerritos*	**RC District 23**
Hon. Adele Andrade-Stadler	*Alhambra*	District 34
Hon. David Avila	*Yucaipa*	SBCTA
Hon. Drew Boyles	*El Segundo*	District 40
Hon. Wendy Bucknum	*Mission Viejo*	District 13
Hon. Steve De Ruse	*La Mirada*	GCCOG
Hon. Paula Devine	*Glendale*	District 42
Hon. Diane Dixon	*Newport Beach*	District 15
Hon. Debra Dorst-Porada	*Ontario*	Pres. Appt., Member-at-Large
Hon. Rose Espinoza	*La Habra*	OCCOG
Hon. Margaret E. Finlay	*Duarte*	District 35
Hon. Alex Fisch	*Culver City*	District 41
Hon. Mark Henderson	*Gardena*	District 28
Hon. Peggy Huang		TCA
Hon. Cecilia Hupp	*Brea*	OCCOG
Hon. Kathleen Kelly	*Palm Desert*	District 2
Hon. Tammy Kim	*Irvine*	District 14
Sup. Matt LaVere	*Ventura County*	CoC
Hon. Jed Leano	*Claremont*	SGVCOG

Hon. Patricia Lock Dawson	*Riverside*	District 68
Hon. Anni Marshall	*Avalon*	GCCOG
Hon. Andrew Masiel, Sr.	*Tribal Gov't Reg'l Planning*	
Hon. Lauren Meister	*West Hollywood*	WSCCOG
Hon. Bill Miranda	*Santa Clarita*	SFVCOG
Hon. John A. Mirisch	*Beverly Hills*	Pres. Appt., Member-at-Large
Hon. Marisela Nava	*Perris*	District 69
Hon. Kim Nguyen	*Garden Grove*	District 18
Hon. Trevor O'Neil	*Anaheim*	District 19
Hon. Edward Paget	*Needles*	SBCTA
Hon. Misty Perez	*Port Hueneme*	Pres. Appt., Member-at-Large
Hon. Michael Posey	*Huntington Beach*	District 64
Hon. Sonny Santa Ines	*Bellflower*	GCCOG
Hon. Nicholas Schultz	*Burbank*	AVCJPA
Hon. David Shapiro	*Calabasas*	District 44
Hon. Becky Shevlin	*Monrovia*	SGVCOG
Hon. Andy Sobel	*Santa Paula*	VCOG
Hon. Wes Speake	*Corona*	WRCOG
Hon. Mark Waronek	*Lomita*	SBCCOG
Hon. Acquanetta Warren	*Fontana*	SBCTA
Hon. Christi White	*Murrieta*	WRCOG
Hon. Tony Wu	*West Covina*	SGVCOG

Members Not Present

Hon. Al Austin, II	*Long Beach*	GCCOG
Hon. Megan Beaman Jacinto	*Coachella*	District 66
Hon. Juan Carrillo	*Palmdale*	District 43
Hon. Ramon Castro	*Imperial County*	CoC
Hon. Letitia Clark	*Tustin*	District 17
Hon. Waymond Fermon	*Indio*	CVAG
Hon. George A. Nava	*Brawley*	ICTC
Hon. Sunny Park	*Buena Park*	OCCOG
Hon. Ariel Pe	*Lakewood*	GCCOG
Hon. Nithya Raman	*Los Angeles*	District 51
Hon. Gabriel Reyes	*San Bernardino County*	CoC
Hon. Rex Richardson	*Long Beach*	District 29
Hon. Frank Zerunyan	*Rolling Hills Estates*	SBCCOG

CALL TO ORDER AND PLEDGE OF ALLEGIANCE

The Honorable Jorge Marquez called the meeting to order at 9:30 a.m. and asked Councilmember Marisela Nava, City of Perris, to lead the Pledge of Allegiance.

PUBLIC COMMENT PERIOD

Chair Marquez provided detailed instructions and general information on how to provide public comments. Additionally, he noted that public comments received via email to CEHDPublicComment@scag.ca.gov after 5pm on Wednesday, March 2, 2022, would be announced and included as part of the official record of the meeting.

Chair Marquez opened the public comment period and noted that this was the time for members of the public to offer comment for matters that are within SCAG's jurisdiction but are not listed on the agenda.

SCAG staff noted there were no written public comments received by email before or after the 5pm deadline on Wednesday, March 2, 2022. SCAG staff also noted that there were no public comments for matters not listed on the agenda.

Chair Marquez closed the public comment period for matters not listed on the agenda.

Chair Marquez provided an update on the Joint Policy Committee (JPC) meeting which kicked off the Policy Development phase for the 2024 update to Connect SoCal, SCAG's Regional Transportation Plan/Sustainable Communities Strategy.

REVIEW AND PRIORITIZE AGENDA ITEMS

No reprioritizations were made.

CONSENT CALENDAR

Approval Item

1. Minutes of the January 6, 2022 Meeting

Receive and File

2. Policy Development Framework for Connect SoCal 2024

3. Connect SoCal's Program Environmental Impact Report (PEIR) 101

4. California Air Resources Board: Sustainable Communities & Climate Policy Update

5. SCE Charge Ready New Construction Rebate

A MOTION was made (Finlay) to approve the Consent Calendar. Motion was SECONDED (Shapiro) and passed by the following roll call vote:

AYES: ANDRADE-STADLER, AVILA, BOYLES, BUCKNUM, DE RUSE, DEVINE, DIXON, FINLAY, FISCH, HENDERSON, HUANG, KELLY, KIM, LEVERE, LEANO, LOCK DAWSON, MARQUEZ, MARSHALL, MASIEL SR. MEISTER, MIRANDA, MIRISCH, M. NAVA, O'NEIL, PAGET, PEREZ, POSEY, SANTA INES, SCHULTZ, SHAPIRO, SHEVLIN, SOBEL, SPEAKE, WARONEK, WARREN, WHITE, WU, AND YOKOYAMA (38)

NOES: (0)

ABSTAIN: (0)

There were no public comments on this item.

INFORMATION ITEMS

6. Expanding Homeownership in the SCAG Region – Panel on Production Solutions

Chair Marquez provided a brief overview and noted that staff invited two panelists to provide information on new and non-traditional approaches to developing homeownership that may offer a more affordable path to homeownership for first-time and lower income homebuyers. He asked David Kyobe, SCAG staff, to introduce both speakers.

Mr. Kyobe introduced to the Committee Sunti Kumjim, Senior Vice President of Development of MBK Rental Living and Scott Laurie, President and CEO of the Olson Company.

Each panelist shared their presentation, which included an overview of homeownership opportunities outside the traditional single-family dwelling options such as modular housing, micro-townhomes, condominiums, and other forms of delivery.

The panelists and SCAG staff responded to comments and questions expressed by the Councilmembers, including observations that focused on the types of modular design, shipping and supply chain costs, finance options, and data on buyers. Comments were also made on the private

equity situation, which may impact affordability. Additional questions focused on building challenges and what can be learned from European countries regarding their factory-built housing.

The Committee thanked the panelists for their presentations.

The comprehensive staff report, including PowerPoint presentations, was included in the agenda packet. Staff noted that contact information for both speakers would be provided.

There were no public comments on this item.

7. Community Economic Resiliency Fund (CERF) – Planning Grant Program

Chair Marquez provided a summary of the Community Economic Resiliency Fund (CERF) program, which is an unprecedented investment in economic development from the State. He asked Jenna Hornstock, SCAG staff, to introduce Mary Collins from the Governor's Office of Planning and Research who provided an overview of the CERF program and share how the $600 million in CERF funds will be allocated.

Ms. Collin's presentation included an overview of the CERF program objectives and status of the current Planning Grant phases. Some highlights included a summary of the following items:

- CERF Program Regional Approach and Strategies
- CERF Program Objectives
- CERF Program Design Projects: Phase 1: Planning and Phase 2: Implementation – Roles and Definitions outlined
- Application Requirements and Eligibility
- Timelines and Next Steps

The panelists and SCAG staff responded to comments and questions expressed by the Councilmembers, including observations that the CERF program focus on housing, land use and transportation integration and related economic development concerns. Additional comments focused on the criteria and guidelines of the administrators or the leadership team that will facilitate the development of the CERF program.

The comprehensive staff report and PowerPoint presentation were included in the agenda packet. Staff noted that an updated presentation that includes updates on the CERF funding source would be uploaded to SCAG's website.

There were no public comments on this item.

8. Connect SoCal 2024 Local Data Exchange Soft Launch

Chair Marquez asked Kevin Kane, SCAG staff, to provide an update on the recently completed "soft launch" of the Local Data Exchange (LDX) site, which coincides with the release of SCAG's Regional Data Platform (RDP).

Mr. Kane's presentation included the development process, purpose, objectives and the LDX timeline relative to Connect SoCal 2024. He noted that the LDX site was designed to provide data, tools, and platforms to assist in local plan development and to ensure local jurisdictions have the opportunity to be actively involved in the development of SCAG's regional plans with accurate data.

The comprehensive staff report, including a PowerPoint presentation, was included in the agenda packet.

There were no public comments on this item.

CHAIR'S REPORT

Chair Marquez reminded the Committee of the upcoming election for the new CEHD Chair and Vice Chair for FY 2022-23. He asked that anyone wishing to nominate themselves or someone on the Committee for the positions of Chair or Vice Chair to please email Clerk of the Board Maggie Aguilar to submit the name or names no later than 5PM on Friday, March 25, 2022.

Chair Marquez noted that his last meeting as Chair of the CEHD would be in April.

STAFF REPORT

SCAG staff Jonathan Hughes noted that the 2022 Regional Conference and General Assembly was scheduled to take place in person, May 4-6, 2022, at the JW Marriott Desert Springs, in Palm Desert, CA. He asked the Committee to ensure that their delegate and alternate member information for the General Assembly, was sent to the Clerk of Board, Maggie Aguilar.

The Committee and staff thanked Chair Marquez for his dedication, service, and valuable contributions to the CEHD Committee.

FUTURE AGENDA ITEMS

There were no future agenda items requested.

ADJOURNMENT

There being no further business, Chair Marquez adjourned the CEHD Committee meeting at 11:35 a.m.

Respectfully submitted by:

Carmen Summers
Community, Economic and Human Development Committee Clerk

[MINUTES ARE UNOFFICIAL UNTIL APPROVED BY THE CEHD COMMITTEE]
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COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE ATTENDANCE REPORT

2021-22

MEMBERS	Representing	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	May	Total Mtgs Attended To Date
Andrade-Stadler, Adele	Alhambra, District 34	1			1	1					1			4
Austin, II, Al	Long Beach, GCCOG													0
Avila, David	Yucaipa, SBCTA				1		1		1		1			4
Beaman Jacinto, Megan	Coachella, District 66				1	1								2
Boyles, Drew	El Segundo, District 40	1	1						1		1			4
Bucknum, Wendy	Mission Viejo, District 13	1			1	1	1		1		1			6
Carrillo, Juan	Palmdale, District 43	1	1		1	1			1					5
Castro, Ramon	Imperial County, CoC													0
Clark, Letitia	Tustin, District 17	1	1	DARK		1	1		1					5
De Ruse, Steve	La Mirada, District 31	1		DARK	1	1			1		1			5
Devine, Paula	Glendale, District 42	1	1	DARK	1	1					1			5
Dixon, Diane B.	Newport Beach, District 15		1	DARK	1	1	1		1		1			6
Dorst-Porada, Debra	Ontario, Pres. Appt.										1			1
Espinoza, Rose	La Habra, OCCOG	1	1		1	1	1		1		1			7
Fermon, Waymond	Indio, CVAG		1		1	1	1		1					5
Finlay, Margaret E.	Duarte, District 35	1	1						1		1			4
Fisch, Alex	Culver City, District 41	1	1		1	1	1		1		1			7
Henderson, Mark E.	Gardena, District 28	1	1				1		1		1			5
Huang, Peggy	TCA	1	1				1		1		1			6
Hupp, Cecilia	Brea, OCCOG	1	1		1	1	1		1		1			7
Kelly, Kathleen	Palm Desert, District 2	1	1		1	1	1		1		1			7
Kim, Tammy	Irvine, RC District 14										1			1
LeVere, Matt	Ventura County, CoC				1	1	1		1		1			5
Leano, Jed	Claremont, SGVCOG	1	1		1	1	1		1		1			7
Lock Dawson, Patricia	Riverside, District 68	1	1			1	1		1		1			6
Marquez, Jorge	Covina, District 33	1	1		1	1			1		1			6
Marshall, Anni	Avalon, GCCOG				1	1	1		1		1			5
Masiel, Sr., Andrew	Pechanga Band of Luiseno Indians			DARK			1		1		1			3
Meister, Lauren	West Hollywood, WCCOG	1	1	DARK	1	1	1		1		1			7
Miranda, Bill	Santa Clarita, SFVCOG	1	1	DARK	1	1	1		1		1			7
Mirisch, John A.	Beverly Hills, Pres. Appt.	1	1	DARK	1		1		1		1			6
Nava, George A.	ICTC	1			1									2
Nava, Marisela	Perris, District 69	1	1		1	1	1		1		1			7
Nguyen, Kim B.	Garden Grove, District 18	1	1		1	1	1				1			6
O'Neil, Trevor	Anaheim, District 19	1	1		1	1			1		1			6
Paget, Edward	Needles, SBCTA/SBCCOG	1	1				1				1			4
Park, Sunny Youngsun	Buena Park, OCCOG	1	1		1	1			1					5
Pe, Ariel "Ari"	Lakewood, GCCOG	1	1		1		1		1					5
Perez, Misty	Port Hueneme, Pres. Appt.	1	1		1	1			1		1			6
Posey, Mike	Huntington Beach, OCCOG	1			1	1	1		1		1			6
Raman, Nithya	Los Angeles, District 51													0
Reyes, Gabriel	San Bernardino County CoC				1									1
Richardson, Rex	Long Beach, District 29	1	1											2
Santa Ines, Sonny	Bellflower, GCCOG	1	1		1		1		1		1			6
Schultz, Nick	Burbank, AVCJPA	1			1	1			1		1			5
Shapiro, David J.	Calabasas, District 44	1	1		1	1	1		1		1			7
Shevlin, Becky A.	Monrovia, SGVCOG	1	1		1	1	1		1		1			7
Sobel, Andy	Santa Paula, VCOG	1	1		1	1	1		1		1			7
Speake, Wes	Corona, WRCOG	1	1		1	1	1		1		1			7
Waronek, Mark	Lomita, SBCCOG	1	1	DARK	1				1		1			5
Warren, Acquanetta	Fontana, SBCTA	1	1	DARK	1	1	1		1		1			7
White, Christi	Murrieta, WRCOG	1	1	DARK	1	1	1		1		1			7
Wu, Tony	West Covina, SGVCOG			DARK	1	1			1		1			4
Yokoyama, Frank Aurelio	Cerritos, District 23	1	1		1	1	1		1		1			7
Zerunyan, Frank	Rolling Hills Estates, SBCCOG	1	1		1	1	1		1					6
TOTAL ATTENDANCE		41	37		41	38	33		41		42	0	0	

AGENDA ITEM 2
REPORT

Southern California Association of Governments

April 7, 2022

To: Community Economic & Human Development Committee (CEHD)
Energy & Environment Committee (EEC)
Transportation Committee (TC)
Regional Council (RC)

From: Anita Au, Senior Regional Planner
(213) 236-1874, au@scag.ca.gov

Subject: Equity Analysis Approach (formerly Environmental Justice Analysis)

EXECUTIVE DIRECTOR'S APPROVAL

Kome Ajise

RECOMMENDED ACTION FOR EEC:
Information Only – No Action Required

RECOMMENDED ACTION FOR CEHD, TC, and RC:
Receive and File

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal 2: Advance Southern California's policy interests and planning priorities through regional, statewide, and national engagement and advocacy.

EXECUTIVE SUMMARY:
In July 2020, SCAG's Regional Council adopted Resolution 20-623-2, affirming its commitment to advancing justice, equity, diversity, and inclusion throughout Southern California and subsequently adopted the Racial Equity Early Action Plan (EAP) in May 2021, outlining goals, strategies, and actions to advance its commitments. SCAG's Environmental Justice (EJ) Program focuses on public outreach, engagement, early and meaningful participation of EJ communities in the decision--making process, and equal and fair access to a healthy environment with the goal of protecting people of color and low-income communities from incurring disproportionately adverse environmental impacts as required by Title VI, EO 12898 and California Government Code Section 11135. The Energy and Environment Committee sets the policy direction for SCAG's EJ Program and plays a central role in advancing two of the primary goals of the EAP which are to: 1) center racial equity in regional policy and planning and bring equity into SCAG's regional planning functions, and 2) encourage racial equity in local planning practices by promoting racial equity in efforts involving local elected officials and planning professionals.

This staff report and presentation provide a preview of SCAG's approach for Connect SoCal 2024's Equity Analysis (formerly Environmental Justice Analysis). The proposed approach is grounded in best practices and aims to meaningfully evaluate inequities in the region and strategies for addressing the resulting issues.

BACKGROUND:

In July 2020, SCAG's Regional Council adopted Resolution 20-623-2, affirming its commitment to advancing justice, equity, diversity, and inclusion throughout Southern California and subsequently adopted the Racial Equity Early Action Plan (EAP) in May 2021, outlining goals, strategies, and actions to advance its commitments. SCAG's Environmental Justice (EJ) Program, which is guided by the policy direction of the Energy and Environment Committee, plays a central role in advancing two of the primary goals of the EAP which are to: 1) center racial equity in regional policy and planning and bring equity into SCAG's regional planning functions, and 2) encourage racial equity in local planning practices by promoting racial equity in efforts involving local elected officials and planning professionals.

SCAG EJ Program focuses on public outreach, engagement, early and meaningful participation of EJ communities in the decision-making process, and equal and fair access to a healthy environment with the goal of protecting people of color and low-income communities from incurring disproportionately adverse environmental impacts. For background, the consideration of EJ in the transportation process stems from Title VI of the Civil Rights Act of 1964,[1] and was further enhanced by Executive Order 12898[2] (1994) which established the need for transportation agencies to disclose to the general public the benefits and burdens of proposed projects on people of color and low-income populations. Executive Order 12898 amplified Title VI by providing protections based on income in addition to race and ordered all federal agencies to consider environmental justice during the planning and decision-making process for all federally funded projects. As a Metropolitan Planning Organization (MPO) that receives federal funding, SCAG is required to conduct early and meaningful outreach to EJ communities and develop an EJ analysis for its regional transportation plans. In addition to federal requirements, SCAG must also comply with California Government Code Section 11135,[3] which mandates fair treatment of all individuals for all state-funded programs and activities.

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[1] Title VI states that "No person in the United States shall, on the ground of race, color or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance."

[2] Federal Actions To Address Environmental Justice in Minority Populations and Low-Income Populations, February 11, 1994. https://www.archives.gov/files/federal-register/executive-orders/pdf/12898.pdf

[3] California Government Code Section 11135 states "no person in the State of California shall, on the basis of race, national origin, ethnic group identification, religion, age, sex, sexual orientation, color, or disability, be unlawfully denied full and equal access to the benefits of, or be unlawfully subjected to discrimination under, any program or activity that is conducted, operated, or administered by the state or by any state agency that is funded directly by the state, or receives any financial assistance from the state."

In an effort to further improve upon the next EJ analysis for Connect SoCal 2024, staff conducted a literature review of EJ methodologies from MPOs throughout the nation. Methodologies were reviewed and analyzed for potentially relevant performance metrics and innovative approaches. In addition to evaluating peer agency EJ methodologies, staff are also coordinating and communicating with stakeholders at the federal and state levels to ensure equity efforts are aligned. More specifically, staff are evaluating the Council on Environmental Quality's Climate and Economic Justice Screening Tool,[4] which has been developed to support federal agencies in identifying communities that are marginalized, underserved, and overburdened by pollution. The current version is still undergoing refinement, but currently provides socioeconomic, environmental, and climate information to inform decisions that may affect these communities. Staff are also in communications with Caltrans staff regarding the agency's forthcoming tool, the Equity Index, which aims to identify communities that are underserved and/or burdened by transportation using environmental, accessibility, and socioeconomic indicators. Because these federal and state tools may be used for future funding programs to prioritize projects in underserved communities, staff want to ensure alignment with the region's approach. SCAG already considers California Environmental Protection Agency's SB 535 Disadvantaged Communities in its analyses. Ultimately SCAG's approach for Connect SoCal 2024 will be grounded in best practices from extensive research and continued communication with many stakeholders.

REFINED APPROACH:
As a planning organization, understanding the disparities that result from geography are central to SCAG's work to plan for a more equitable future. SCAG's long-range plan has long included an EJ analysis that evaluates current conditions and the consequences of the region's transportation projects on people of color and low-income households, as statutorily required. The analysis has also evaluated impacts on other vulnerable populations like older adults, young children, households without vehicles, people with disabilities, people with limited English proficiency, and more. Because SCAG's analysis encompasses more than just environmental justice, staff is recommending developing a more robust equity analysis for Connect SoCal 2024. This evolved approach is described in more detail below. It is important to note that the statutory requirements would continue to be addressed with this shift.

Revisiting Populations and Communities
Language and terms are intricately connected to equity and representation and are evolving. The tables below provide an overview of the proposed changes to the populations and communities considered for the equity analysis. SCAG has long utilized the names of indicators from existing terminology utilized in their original data sources. However, the terminology does not always represent current best practice, and in some cases, may be offensive, triggering, or erasing to some communities. Thus, within SCAG's equity analysis terminology will be updated to reflect current

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[4] Climate and Economic Justice Screening Tool: https://screeningtool.geoplatform.gov/en/

best practice, such as renaming minority populations to people of color and renaming Non-English Speakers to Individuals with Limited English Proficiency. Staff will also update the poverty threshold for low-income households. Finally, the previous three communities, Environmental Justice Areas, SB 535 Disadvantaged Communities, and Communities of Concern, will be incorporated into one community, Prioritized Equity Populations and Areas (PEPA). This adjusted approach is described in more detail below.

In summary, two populations groups, people of color and low-income households, and one community, PEPA, will be considered for the Connect SoCal 2024 Equity Analysis.

PROPOSED CHANGES FOR CONNECT SOCAL 2024 EQUITY ANALYSIS	
Populations	
Minority Populations	Renamed to People of Color
Low-Income Households	Updated with base year poverty threshold and incorporating one income level analysis
Other Populations (Young Children, Older Adults, Disabled, Non-English Speakers, Households w/o High School Diploma, Foreign Born, Zero-Vehicle Households)	Incorporated in Prioritized Equity Populations and Areas (PEPA)
Communities	
Environmental Justice Areas	Incorporated in Prioritized Equity Populations and Areas (PEPA)
SB535 Disadvantaged Communities	
Communities of Concern	

Defining Prioritized Equity Populations and Areas (PEPA)
Staff are proposing that Prioritized Equity Populations and Areas, or PEPA, be comprised of 10 categories, including: groups that are statutorily required for the equity analysis like People of Color, Low-Income Households, groups that were previously used in EJ analyses like Older Adults, People with Disabilities, People with Limited English Proficiency, Zero-Vehicle Households, People without a High School Diploma, Disadvantaged Communities, and groups that have become increasingly relevant and important to SCAG initiatives like Female-Headed Households, and Rent-Burdened Households.

Staff are proposing that PEPAs be determined using two methods:
(1) Census tracts that have an above average regional concentration of BOTH low-income households and people of color; and
(2) Census tracts that have an above average regional concentration of low-income households or people of color AND have above average regional concentrations of four or more of the eight remaining categories listed above (Older Adults, People with Disabilities, People with

Limited English Proficiency, Zero-Vehicle Households, People without a High School Diploma, Disadvantaged Communities, Female-Headed Households, and Rent-Burdened Households).

Incorporating Equity into Analysis

In addition to streamlining and consolidating the populations and communities utilized for the equity analysis, staff are also considering other methods of incorporating equity into the analysis. Staff is proposing to add analysis of race and ethnicity where available to align with SCAG's existing equity efforts. Staff also intend to expand on the demographic trends section and include more existing conditions data that align with SCAG's Racial Equity Baseline Conditions Report to provide more context to the equity analysis. Young children, a population previously included in EJ analyses, but not included in PEPA, will be more fully incorporated into the expanded demographic trends section and certain equity performance indicators that tend to pose significant impacts like air quality. Young children are also considered in under the SB 535 Disadvantaged Communities criteria. Similarly, the foreign-born population was also previously included in EJ analyses and not included in PEPA but will be included in the expanded demographic trends section, because impacts of these individuals are addressed by considering individuals with limited English proficiency.

Next Steps

Staff is seeking input from the Energy and Environment Committee on this evolved approach and the shift to a more robust equity analysis. Staff has conducted extensive internal outreach with subject matter experts and will continue to seek input from external stakeholders to ensure the proposed methodology is inclusive of EJ and equity concerns and accurately reflect SCAG initiatives. Staff will return to the Energy and Environment Committee to present on the proposed Equity Performance Indicators and will continue to return to the Committee to provide updates on the Connect SoCal 2024 Equity Analysis. The table provided below provides a forecast of updates to the Committee.

Proposed Date	Topic	Description
June 2022	Equity Analysis Performance Indicators	Discuss proposed indicators (informed by the updated Equity Analysis)
July 2022	Racial Equity Baseline Conditions Update	Share updated baseline conditions information
September/ October 2022	Equity in Action Presentation	Seek dynamic and engaging speakers from agencies doing innovative work on equity to educate and inspire other jurisdictions
November 2022	Equity Analysis Update	Status update and highlight a major issue area (TBD)
March 2023	Equity Analysis Update	Status update and highlight a major issue area (TBD)

April/June 2023	Equity in Action Presentation	Seek dynamic and engaging speakers from agencies doing innovative work on equity to educate and inspire other jurisdictions
July/August 2023	Equity Analysis Update	Status update and highlight a major issue area (TBD)
October 2023	Equity Analysis Update: Report Release (Tentative)	

FISCAL IMPACT:

Work associated with this item is included in the Fiscal Year 2021-2022 Overall Work Program (020. 0161.06: Environmental Justice Outreach and Policy Coordination).

ATTACHMENT(S):

1. PowerPoint Presentation - Equity Analysis Approach

Equity Analysis Approach (Formerly EJ Analysis)
Connect SoCal 2024

Anita Au, Senior Regional Planner

Energy & Environment Committee

April 7, 2022

www.scag.ca.gov

Statutory Requirement

Federal

Title VI of the Civil Rights Act of 1964
- "…race, color or national origin…"

Executive Order 12898 (1994)
- "…minority populations and low-income populations…"

State

California Government Code Section 11135
- "…race, national origin, ethnic group identification, religion, age, sex, sexual orientation, color, or disability…"

EJ Research

- **Conducted** extensive research
  - Reviewed 20 MPO EJ Methodologies

- **Grounded** in best practices

Federal and State Equity Efforts

- **Aligned** with Federal and State equity efforts

CEQ's Climate and Economic Justice Screening Tool

Caltrans Equity Index

OEHHA's CalEnviroScreen

2024 Equity Analysis

Environmental Justice Analysis ➡️ **Equity Analysis**

Incorporate Equity in Analysis

Enhance and Consolidate Performance Indicators

Incorporate Equity into Analysis

EQUITY

Title VI	Environmental Justice	Other FHWA & FTA Groups
• Race	• Low Income	• Sex/Gender
• Color	• Minority	• Disability
• National Origin		• Age
		• LEP

2020 EJ Analysis Populations and Communities

Minority Populations
- African American
- Hispanic
- Asian/Pacific Islander
- Native American and Alaskan Native
- Other

Low-Income Households
- Family of three earning less than $19,105 in 2016
- By Poverty Levels
- By Quintiles

Other Populations
- Young Children
- Seniors
- Disabled/Mobility Limited
- Non-English Speakers
- w/o High School Diploma
- Foreign Born
- Zero-Vehicle Households

P O P U L A T I O N S

Environmental Justice Areas
- Transportation Analysis Zones (TAZs) (similar to census track block groups) that have a higher concentration of minority population or low-income households than is seen in the region as a whole

SB 535 Disadvantaged Communities
- Census tracts that have been identified by the California Environmental Protection Agency (Cal/EPA) as DAC based on the requirements set forth in SB 535, which sought to identify areas disproportionately burdened by and vulnerable to multiple sources of pollution

Communities of Concern
- Census Designated Places (CDP) and the City of Los Angeles Community Planning Areas (CPA) that fall in the upper one-third of all communities in the SCAG region for having the highest concentration of minority population **and** low-income households

C O M M U N I T I E S

2024 Equity Analysis Populations and Communities

Minority Populations
- African American
- Hispanic
- Asian/Pacific Islander
- Native American and Alaskan Native
- Other

➤ Renamed to People of Color

Low-Income Households
- Family of three earning less than $19,105 in 2016
- By Poverty Levels
- By Quintiles

➤ Updated with base year poverty threshold and incorporating one income level analysis

Other Populations
- Young Children
- Seniors
- Disabled/Mobility Limited
- Non-English Speakers
- w/o High School Diploma
- Foreign Born
- Zero-Vehicle Households

➤ Incorporated in Prioritized Equity Populations and Areas (PEPA)

P O P U L A T I O N S

SCAG

2024 Equity Analysis Populations and Communities

Environmental Justice Areas
- Transportation Analysis Zones (TAZs) (similar to census track block groups) that have a higher concentration of minority population or low-income households than is seen in the region as a whole

➤ Incorporated in Prioritized Equity Populations and Areas (PEPA)

SB 535 Disadvantaged Communities
- Census tracts that have been identified by the California Environmental Protection Agency (Cal/EPA) as DAC based on the requirements set forth in SB 535, which sought to identify areas disproportionately burdened by and vulnerable to multiple sources of pollution

➤ Incorporated in Prioritized Equity Populations and Areas (PEPA)

Communities of Concern
- Census Designated Places (CDP) and the City of Los Angeles Community Planning Areas (CPA) that fall in the upper one-third of all communities in the SCAG region for having the highest concentration of minority population **and** low-income households

➤ Incorporated in Prioritized Equity Populations and Areas (PEPA)

C O M M U N T I E S

2024 Equity Analysis Populations and Communities

People of Color
- African American
- Hispanic
- Asian/Pacific Islander
- Native American and Alaskan Native
- Other

Low-Income Households
- Base Year Federal Poverty Level
- Analysis By Quintiles

Prioritized Equity Populations and Areas (PEPA)
- Census tracts that have a concentration of BOTH low-income households and people of color
- Census tracts that have a concentration of either low-income households or people of color AND 4 or more of the 8 additional criteria.

P O P U L A T I O N S

C O M M U N T I E S

2024 Prioritized Equity Populations and Areas (PEPA)

STATUTORILY REQUIRED

- People of Color
- Low-Income Households

PREVIOUSLY ANALYZED

- Older Adults (Previously Seniors)
- People with Disabilities
- People with Limited English Proficiency
- Zero-Vehicle Households
- People without a High School Diploma
- Disadvantaged Communities

NEW

- Female-Headed Households
- Rent-Burdened Households

2024 Prioritized Equity Populations and Areas (PEPA)

Census tracts that have a concentration of **BOTH** low-income households and people of color

Census tracts that have a concentration of either low-income households or people of color **AND** 4 or more of the 8 additional criteria.

AND
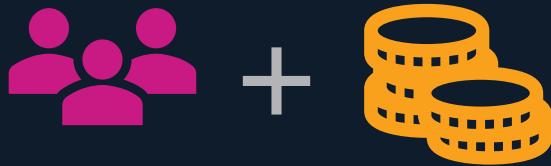
Incorporate Equity into Analysis

Add Analysis of Race/Ethnicity (when available)

Expand Demographic Trends (Baseline Conditions)

Add More Existing Conditions Data

Next Steps

Equity Analysis Performance Indicators	Racial Equity Baseline Conditions Update	Equity in Action Presentation	Equity Analysis Update
June 2022	July 2022	September/ October 2022	November 2022

March 2023	April/ June 2023	July/ August 2023	October 2023
Equity Analysis Update	Equity in Action Presentation	Equity Analysis Update	Equity Analysis Update: Report Release

Attachment: PowerPoint Presentation - Equity Analysis Approach (Equity Analysis Approach (formerly Environmental Justice Analysis))

Packet Pg. 29

Thank you!

Anita Au, Senior Regional Planner

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www.scag.ca.gov

AGENDA ITEM 3
REPORT

April 7, 2022

		EXECUTIVE DIRECTOR'S APPROVAL
To:	Community Economic & Human Development Committee (CEHD) Energy & Environment Committee (EEC) Transportation Committee (TC) Regional Council (RC)	*Kome Ajise*
From:	Rongsheng Luo, Program Manager II (213) 236-1994, luo@scag.ca.gov	
Subject:	Draft 2022 South Coast Air Quality Management Plan (AQMP)	

RECOMMENDED ACTION FOR EEC:
Information Only – No Action Required

RECOMMENDED ACTION FOR CEHD, TC, AND RC:
Receive and File

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal 1: Produce innovative solutions that improve the quality of life for Southern Californians.

EXECUTIVE SUMMARY:
Jointly prepared by the South Coast Air Quality Management District (AQMD), the lead agency, the California Air Resources Board (ARB), and SCAG, the Draft 2022 Air Quality Management Plan (AQMP) has been released for public review. Dr. Sarah Rees, South Coast AQMD Deputy Executive Officer, and Ariel Fideldy, ARB South Coast Air Quality Planning Manager, will provide a joint presentation on the Draft 2022 AQMP including the respective major control measures of AQMD and ARB.

BACKGROUND:
Pursuant to the Federal Clean Air Act (CAA), the 2022 Air Quality Management Plan (AQMP) is being prepared to attain the federal 2015 8-hour ozone national ambient air quality standard in the South Coast Air Basin and the Coachella Valley respectively. The 2022 AQMP is being jointly prepared by three responsible agencies: the South Coast Air Quality Management District (AQMD), the lead agency, the California Air Resources Board (ARB), and SCAG. The 2022 AQMP is required to be submitted to the U.S. Environmental Protection Agency (EPA) by August 3, 2022.

As reported previously, SCAG's role in the 2022 AQMP development process includes providing the socio-economic growth forecast and regional transportation demand model output data to the South Coast AQMD for use in estimating and forecasting emission inventories and airshed modeling; and vehicle activity data to the ARB for use in developing on-road emissions. SCAG has provided this data to the respective agencies.

In addition to the technical data, SCAG is also responsible for writing a portion of the 2022 AQMP for the South Coast Air Basin on the region's Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) and Transportation Control Measures (TCMs) as they relate to air quality. The document, commonly referred to as "Appendix IV-C," primarily includes an overview of the adopted Connect SoCal (2020 RTP/SCS); a list of committed TCMs in the South Coast Air Basin that are federally enforceable and subject to timely implementation; and, pursuant to Clean Air Act requirements, an analysis of reasonably available TCMs. As recommended by the EEC in January 2022 and subsequently approved by the RC in February 2022, the Draft Appendix IV-C has been transmitted to the South Coast AQMD for inclusion in the Draft 2022 AQMP for public release in March 2022.

The 2022 AQMP will include an important component relative to regional transportation planning and federal transportation conformity requirements, the motor vehicle emissions budgets, which set an upper limit which on-road transportation activities are permitted to emit. The new emission budgets established as part of the 2022 AQMP process and approved in the final plan will become the functioning emission budgets for transportation conformity for future RTP/SCS, Federal Improvement Program (FTIP), and their amendments post the effectiveness date of the new emission budgets.

Note that additional air quality plans are also being developed by three of the other four local air districts within the SCAG region in collaboration with ARB. These air quality plans also include their respective new motor vehicle emissions budgets that will become the functioning emission budgets for transportation conformity for future RTP/SCS, FTIP, and their amendments post the effectiveness date of the new emission budgets. Staff has been closely participating in and monitoring the various air quality planning efforts throughout the SCAG region and will report on any significant issues to EEC as appropriate.

FISCAL IMPACT:
Work associated with this item is included in the current FY 2021-22 Overall Work Program (025.0164.01: Air Quality Planning and Conformity).

ATTACHMENT(S):
1. PowerPoint Presentation - Draft 2022 AQMP - 1. Overview and AQMD Strategy
2. PowerPoint Presentation - Draft 2022 AQMP - 2. ARB SIP Strategy

DRAFT 2022 AIR QUALITY MANAGEMENT PLAN

SCAG Energy & Environment Committee

April 7, 2022

Sarah Rees, Ph.D.
Deputy Executive Officer
South Coast Air Quality Management District

# Background – Air Quality Management Plans

- An Air Quality Management Plan (AQMP) is the region's blueprint on how it will attain air quality standards
- When U.S. EPA revises a National Ambient Air Quality Standard*
    - South Coast AQMD is required to prepare an AQMP if the region does not meet the standard
    - Each plan is prepared for a specific standard and does not address all standards at once
- In 2015, U.S. EPA strengthened the ozone NAAQS from 75 to 70 parts per billion (ppb)
    - EPA does not consider costs when setting health-based standard
- 2022 AQMP focuses on 2015 8-hour ozone standard with attainment year in 2037**

*NAAQS cover ozone, particulate atter, lead, carbon monoxide, sulfur dioxide, and nitrogen dioxide
** State standards also addressed, whereas upcoming deadlines for other standards (e.g., 2023 ozone deadline) not part of this plan

2

Ozone Trends in the South Coast Air Basin*
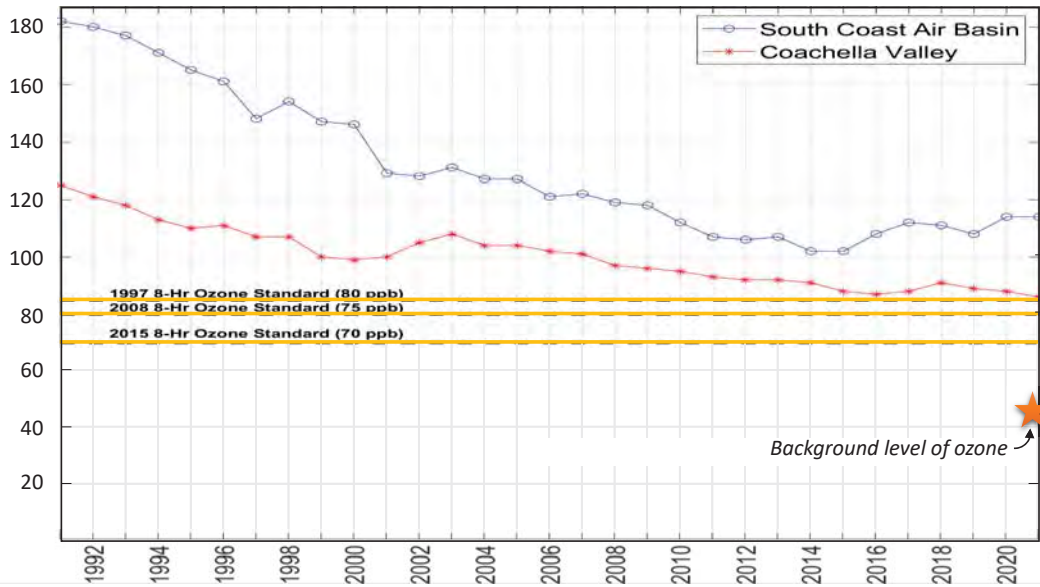
Poor meteorology and complex photochemistry have resulted in recent poor ozone air quality despite on-going emission reductions

Standards allow for some air pollution

Background level of ozone

* Design values shown, Preliminary data for 2021

3

2022 AQMP Input

Keeping this slide to show SCAG's role for AQMP. Put it a full screen mode. There is a custom animation to highlight SCAG. Little fun in slide!
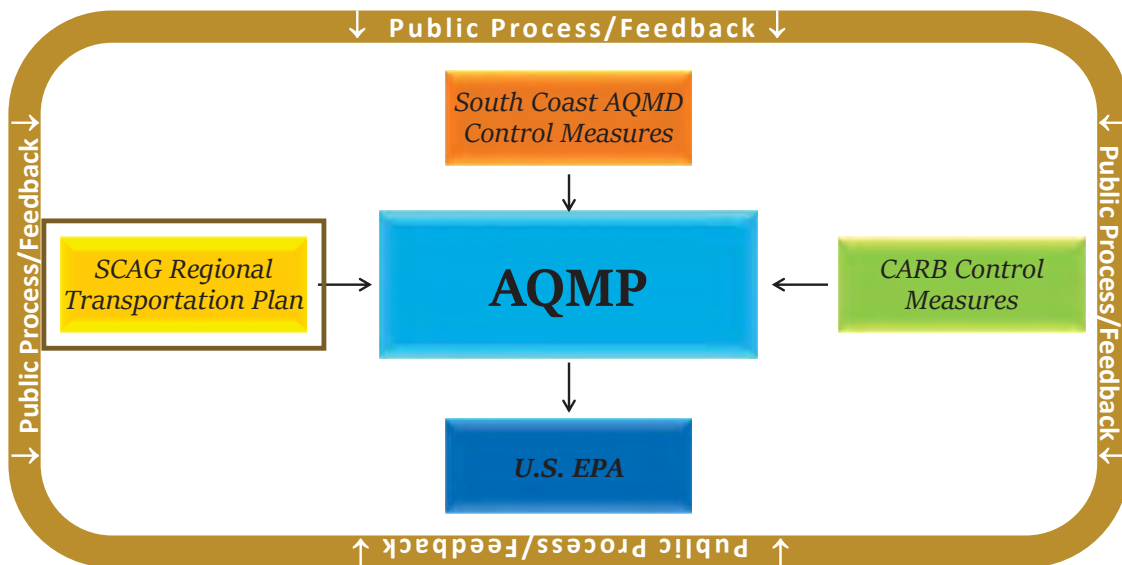
4

NOx Emissions and Reduction Goals

Basin Total NOx Emissions

45% Reduction

55% Reduction

73% Reduction

Baseline   Carrying Capacity
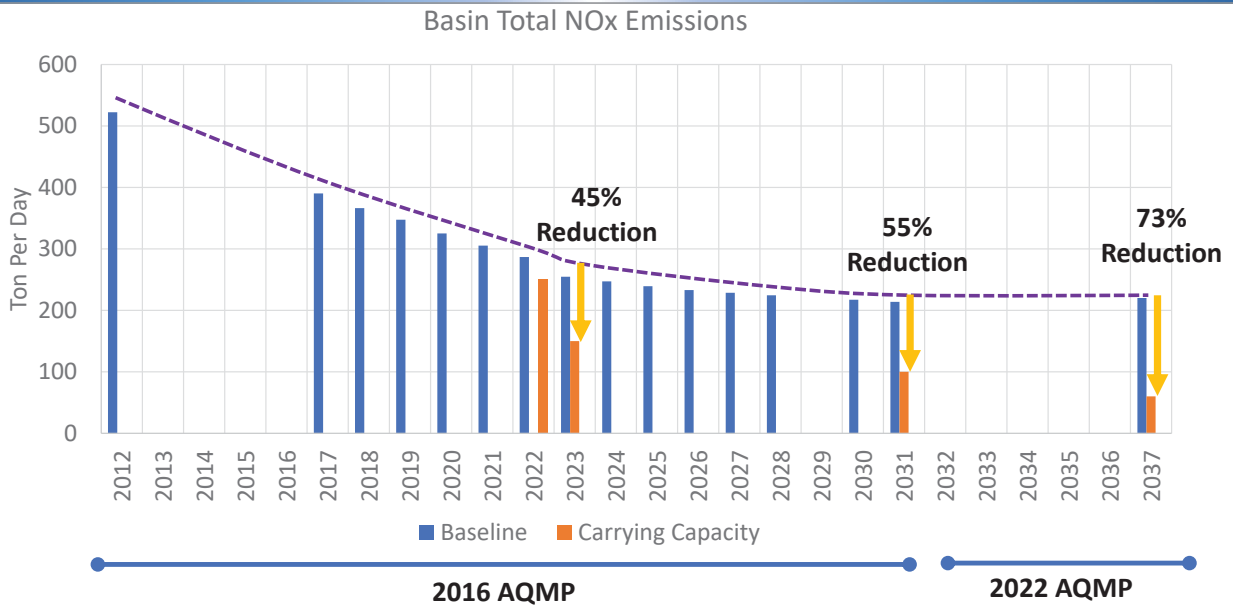
2016 AQMP   2022 AQMP

2016 AQMP emissions inventory for 2012 to 2031, and 2022 AQMP preliminary emissions inventory for 2037

NOx Reductions Needed for Attainment

Basin Total NOx Emissions in tons per day

2018

2037

Reductions from Already Adopted Regulations and Programs

Additional Reductions Needed to attain 70 ppb

Total Reductions from 2018 to attainment

Carrying Capacity is approximately 60 tons per day

- Heavy-Duty Diesel Trucks
- Medium-Duty & Heavy-Duty Gas Trucks
- Buses
- Cars/Light-Duty Trucks/SUVs/Motorcycle
- Off-Road Equipment and Vehicles
- Locomotives
- Aircraft
- Ocean Going Vessels
- Commercial Harbor Craft
- Recreational Boats
- Residiential Fuel Combustion
- Industrial Fuel Combustion
- (pre-)RECLAIM
- Other Statioanry

6

Is Attaining the Ozone Standard in 15 Years Possible?

Attaining this standard is possible, but...

- *Will be difficult*
- *Cannot be achieved alone*
- *Will be expensive with existing technologies*
- *Will require flexibility provided by Clean Air Act*
  - *'Black Box'*

2037

Traditional Air Quality Planning Won't Work

Traditional approach relies on additional *tailpipe/exhaust stack controls*, *new engines technology*, or *fuel improvements* tailored to individual use cases

Traditional Approach

These traditional approaches on already highly controlled sources cannot achieve additional ~73% reduction in South Coast and must be bypassed wherever possible

8

Key Considerations on a Zero Emissions Approach

What does the pathway look like through time?

Which fuels for which applications?

How can this be made most affordable?
- **Ensures adoption at scale, and available equitably**

Anticipated Key Issues

Large Magnitude of Emission Reductions
- Amount needed from Stationary & Mobile measures, Federal & State measures

Transition to Zero Emissions
- Infrastructure (grid, hydrogen, reliability, affordability)
- Fuels pathway given earlier attainment dates for other standards

Building Electrification
- Coordination with other agencies

Federal and International Sources

- Approximately 1/3 of the 2037 baseline emissions inventory is regulated primarily under federal and international jurisdiction, with limited authority for CARB/South Coast AQMD
  - Ships, aircraft, locomotives, etc
- Cannot assign responsibility to federal government to reduce emissions, even from federal sources
- Attainment is not possible without significant reductions from these sources
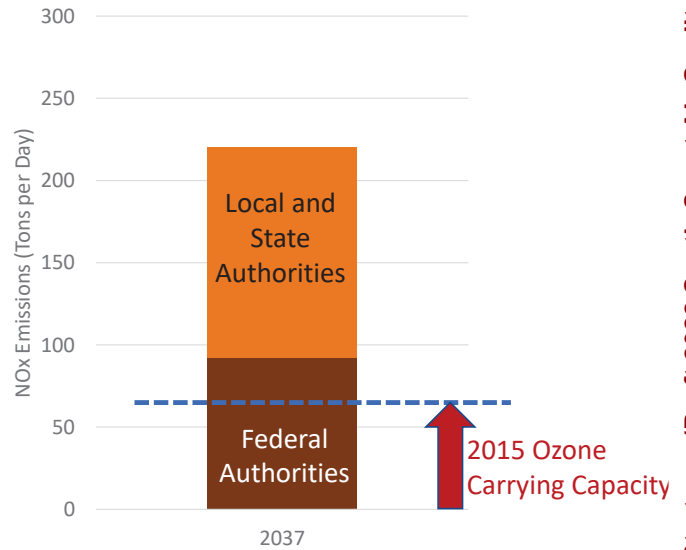
11

Overview of Draft Stationery and Area Sources Control Strategy

- Residential combustion:
  - A combination of zero-emission and other low-NOx technology approaches
  - 2037 Goal: ~70 percent reduction
- Commercial combustion
  - A combination of zero-emission, near-zero, and other NOx combustion reduction technology approaches
  - 2037 Goal: ~70 percent reduction
- Large Combustion Equipment
  - Focus on traditional source-specific and industry-specific command and control rules
  - 2037 Goal: ~ 37 percent reduction from commercial combustion equipment

2037 NOx Baseline Emissions

Commercial Combustion 14 tons/day

Large Combustion 15.3 tons/day

Residential Combustion 9.8 tons/day
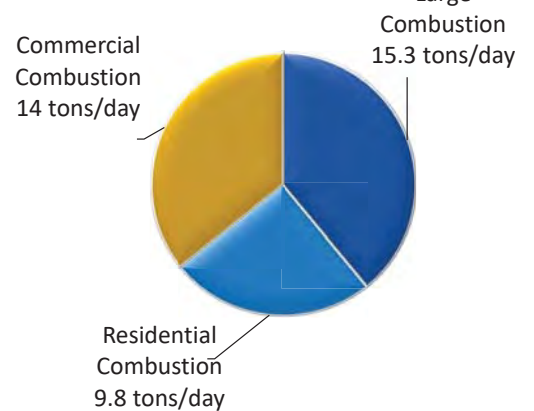
Total NOx: 39 Tons/Day

Overview of Draft South Coast AQMD Mobile Source Control Strategy

Facility Based Mobile Source Measures

Emission Reductions from Incentive Program

Partnership with local, state, federal and international entities

Summary of Potential Approach to Reducing NOx by Major Source Category

Emissions (tons per day)

57%	Point and Area*
76%	On-Road Mobile
63%	Off-Road Mobile
80%	OGVs
	Aircraft

Legend:
- Reduction from Incentives
- 2037 Remaining Emissions
- Potential Reductions from Draft 2022 AQMP and Draft 2022 SIP strategy

*Some incentives also anticipated for area sources, but not yet defined
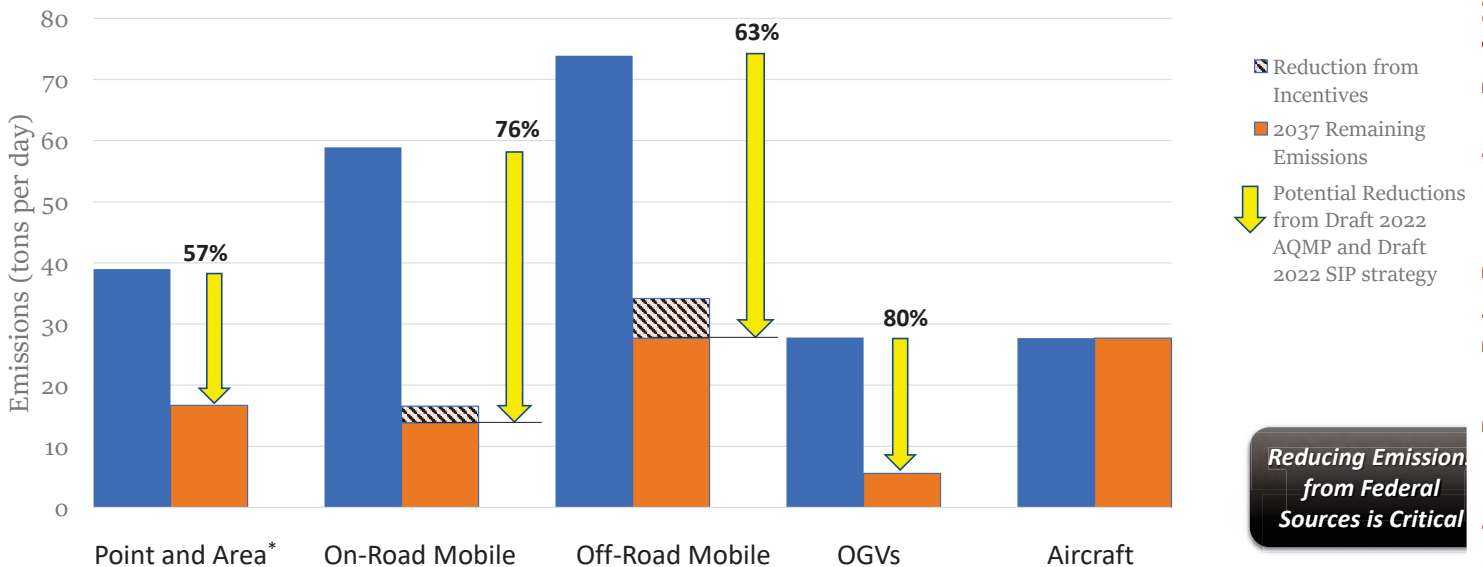
Reducing Emissions from Federal Sources is Critical

Outreach

'Standard' Comprehensive AQMP Outreach + **Additional Critical Outreach**
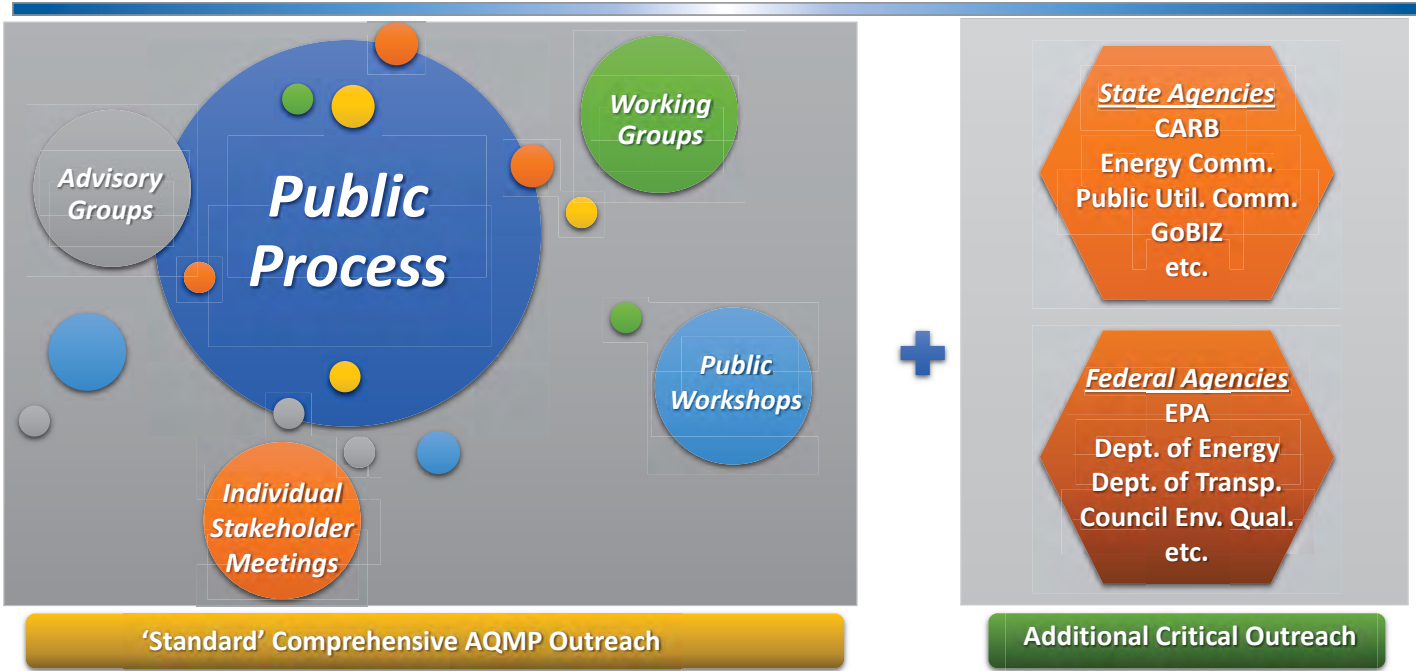
Coachella Valley

- Designated as "Severe" nonattainment for the 2015 8-hour ozone standard with attainment year 2032
- Coachella Valley's ozone attainment depends on emission reductions placed in the South Coast Air Basin
- South Coast Air Basin's attainment has measures subject to CAA Section 182(e)(5), which is allowed only in an extreme nonattainment area
- It is likely necessary to bump-up Coachella Valley to "extreme" with attainment in 2037
- Coachella Valley is already "extreme" nonattainment for the 1997 8-hour ozone standard (80ppb)

Next Steps

Draft AQMP
March 2022

Draft Final AQMP
May to June 2022

South Coast AQMD Board
Summer to Fall 2022

U.S. EPA
– 18 months after submission

Regional Public Workshops
April 2022

Regional Hearings
Summer 2022

CARB Board
Summer to Fall 2022

Attachment: PowerPoint Presentation - Draft 2022 AQMP - 1. Overview and AQMD Strategy (Draft 2022 South Coast Air Quality Management

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CALIFORNIA
AIR RESOURCES BOARD

2022 State SIP Strategy

SCAG Energy & Environment Committee
April 7, 2022

Ariel Fideldy, Manager, South Coast Air Quality Planning Section

1

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70 ppb Challenge Across the State

- U.S. EPA revised the 8-hour ozone standard to 70 ppb in 2015
- 19 nonattainment areas in California
  - Attainment years 2020-2037
- 10 areas must submit SIPs
- South Coast most challenging, but other areas will also need commitments
- SIPs due August 2022
- Continue to identify and implement measures for 75 and 80 ppb

70 ppb 8-Hour Ozone Nonattainment Areas

Legend
Air Basin
County
8-Hr O3 Classification
- Marginal (Rural Transport)
- Marginal
- Moderate
- Serious
- Severe-15
- Extreme

CARB

2

Attainment Plans and 2022 State SIP Strategy

- District Measures
- Federal Actions Needed
- CARB Measures
- Transportation Planning Agency Activity & Actions
- Attainment Plan (SIP)

CARB
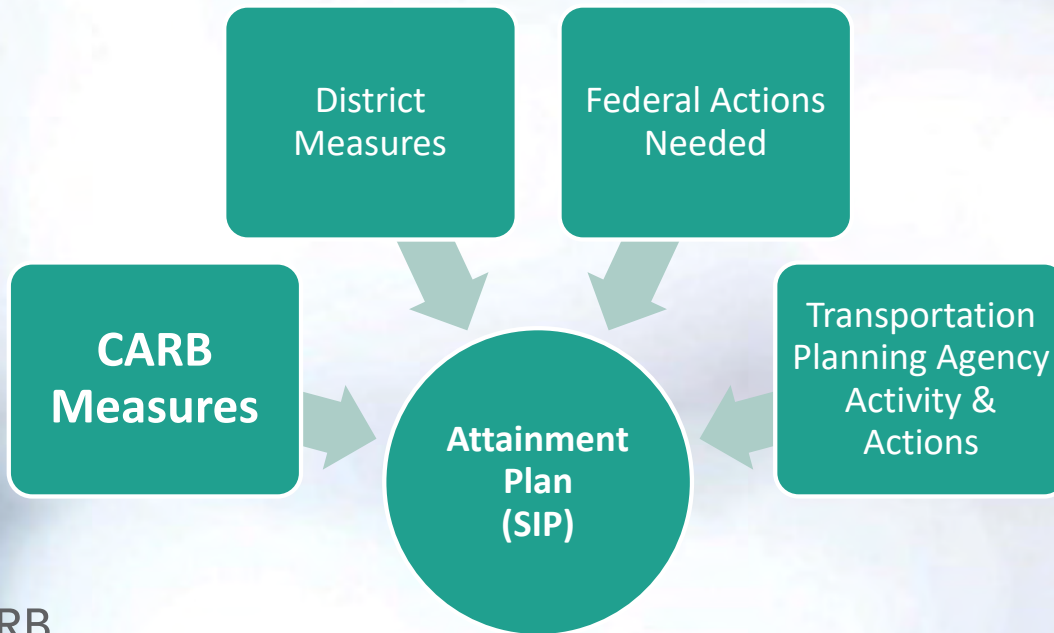
2022 State SIP Strategy

- Draft Released on January 31, 2022
- Unprecedented variety of new measures to reduce emissions using all mechanisms available
- Level of action is necessary to meet all air quality standards and protect public health
- Drives pace and scale of CARB rulemakings
- Prioritizes near-term reductions for earlier SIP deadlines

Draft
2022 State Strategy for the State
Implementation Plan
January 31, 2022

CALIFORNIA
AIR RESOURCES BOARD

CARB
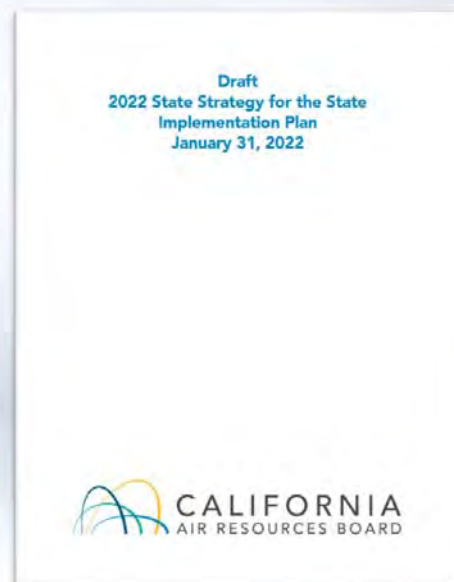
Proposed 2022 State SIP Strategy Measures

On-Road	Off-Road	Primarily Federally-Regulated
• Advanced Clean Fleets Regulation • Zero-Emission Trucks • On-Road Motorcycle New Emissions Standards • Clean Miles Standard* • Enhanced Regional Emission Analysis in State Implementation Plans	• Tier 5 Off-Road Engine Standard • Amendments to In-Use Diesel-Fueled Fleets Regulation • Zero-Emission TRU Part II • Commercial Harbor craft • Cargo Handling Equipment • Off-Road Zero-Emission Targeted Manufacturer Rule • Clean Off-Road Fleet Recognition Program • Spark-Ignition Marine Engine Standards	• In-Use Loco Regulation • Future Measures for Aviation Emissions Reductions • Future Measures for OGV Emissions Reductions

Other

- Consumer Products
- Zero-Emission Standard for Space and Water Heaters

CARB   *Already adopted by Board

On-Road Heavy-Duty

- **Advanced Clean Fleets Regulation**
  - ZE requirements for heavy-duty fleets
  - Adoption: 2023, Implementation beginning: 2023
- **Zero-Emission Trucks Measure**
  - Exploring new methods to target the replacement of older trucks and accelerate transition to ZEV, beyond ACT/ACF
  - Adoption/Implementation: TBD

CARB

On-Road Light-Duty

- **Advanced Clean Cars II** (2016 SSS measure)
  - Manufacturer ZE sales requirements for LDV
  - Adoption: 2022, Implementation beginning: 2026
- **On-Road Motorcycles New Emissions Standards**
  - More stringent exhaust/evap standards & ZE sales threshold
  - Adoption: 2022, Implementation beginning: 2024
- **Clean Miles Standard Regulation** (Adopted 2021)
  - ZE requirements for transportation network companies
  - Implementation beginning: 2023
- **Enhanced Regional Emission Analysis in SIPs**
  - Exploring options to facilitate reductions in VMT – update MVEB development process, RACM support, update CMAQ guidance
  - Development/Implementation: TBD

CARB

Federal Action is Critical

California-Regulated Sources:
Cars, Trucks, & Equipment

Reductions from California Sources:

>70% as of 2020
>85% by 2037

Primarily Federally Regulated Source Emissions Surpassed CA Source Emissions in 2020, & will be Double CA Source Emissions by 2030

Primarily Federally-Regulated Sources: Interstate Trucks, Planes, Trains, & Ships

Statewide Mobile Source NOx Emissions (tpd)

2000 · 1500 · 1000 · 500 · 0

2000 · 2005 · 2010 · 2015 · 2020 · 2025 · 2030 · 2035 · 2040

CARB   Source: CARB, CEPAM 2019 SIP - Standard Emission Tool (v1.03), https://ww2.arb.ca.gov/applications/cepam2019v103-standard-emission-tool

Federal Actions Needed

On-Road Heavy-Duty Vehicles
- Low-NOx Engine Standards
- Zero-Emission Engine Standards

Off-Road Equipment
- Tier V Standards
- Zero-Emission Standards Where Feasible

Locomotives
- More Stringent National Emission Standards
- Zero-Emissions Standards for Switcher
- Address Remanufacturing Loophole

Ocean-Going Vessels
- More Stringent NOx and PM Standards Requirements
- Cleaner Fuel and Visit Requirements

Aviation
- More Stringent Engine Standards
- Cleaner Fuel and Visit Requirements
- Zero-Emission Airport On Ground Support Requirements

CARB

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CARB NOx Strategy Benefits

South Coast

NOx (tpd)

Legend: Adopted, Remaining 2016 SSS, 2022 SSS
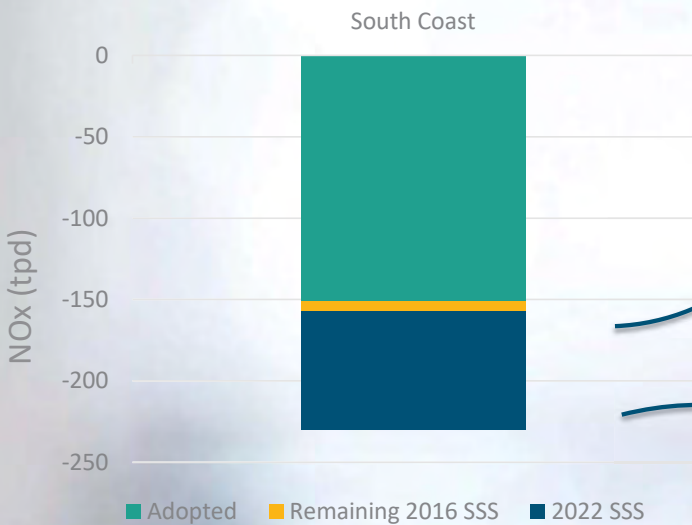
Total NOx Reductions in 2037

South Coast

Legend: On-Road, Off-Road, Buildings, Locomotive, Federal Action

2022 SSS Reductions in 2037

CARB

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Attachment: PowerPoint Presentation - Draft 2022 AQMP - 2. ARB SIP Strategy (Draft 2022 South Coast Air Quality Management Plan (AQMP))

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Public Process & Next Steps

| July 2021: Public Workshop | Summer 2021: Stakeholder Meetings | Oct 2021: Release 2022 State SIP Strategy Draft Measures, 2nd Public Workshop | Oct/Nov 2021: Participated in SJVAPCD & SCAQMD Control Measure Workshops | January 2022: Release Draft 2022 State SIP Strategy | February 2022: 3rd Public Workshop | February 2022: Informational Update CARB Board Hearing | Summer 2022: Board Consideration of 2022 SSS & District SIPs |

CARB

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Contact Us!

- Austin Hicks, Air Pollution Specialist
  Austin.Hicks@arb.ca.gov
- Ariel Fideldy, Manager
  Ariel.Fideldy@arb.ca.gov
- General SIP Questions: SIPplanning@arb.ca.gov

  https://ww2.arb.ca.gov/resources/documents/2022-state-strategy-state-implementation-plan-2022-state-sip-strategy

CARB

Southern California Association of Governments

April 7, 2022

To:	Community Economic & Human Development Committee (CEHD)	**EXECUTIVE DIRECTOR'S APPROVAL**
	Energy & Environment Committee (EEC)	
	Transportation Committee (TC)	
	Regional Council (RC)	
From:	Courtney Aguirre, Program Manager II	
	(213) 236-1990, aguirre@scag.ca.gov	
Subject:	Racial Equity Early Action Plan – FY22 Progress Report	

RECOMMENDED ACTION:
Information Only – No Action Required

RECOMMENDED ACTION FOR CEHD, TC, AND RC:
Receive and File

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal 1: Produce innovative solutions that improve the quality of life for Southern Californians.

EXECUTIVE SUMMARY:
In July 2020 SCAG's Regional Council adopted Resolution No. 20-623-2, affirming its commitment to advancing justice, equity, diversity, and inclusion throughout Southern California. The resolution called for the formation of an ad hoc Special Committee on Equity and Social Justice to further develop SCAG's response to advancing equity. The Committee met on a quarterly basis starting in September 2020 and concluding in March 2021, culminating in the development of an early action plan. In May 2021, the Regional Council adopted the Racial Equity Action Plan (EAP), and since then, SCAG staff have made significant progress on implementing actions included within the plan. This is a report on SCAG's progress on advancing equity across the region.

BACKGROUND:
On July 2, 2020, SCAG's Regional Council adopted Resolution No. 20-623-2, affirming its commitment to meaningfully advance justice, equity, diversity, and inclusion, and declaring its intent to end racial and social disparities internal to the agency, strengthen the way it engages and convenes to protect and expand community voice and power, and work in partnership with others to close the gap of racial injustice and better serve the region's Black, Indigenous, and People of

Color. The resolution called for the formation of an ad hoc Special Committee on Equity and Social Justice to further develop SCAG's response to advancing social justice throughout the agency's activities and advise the Regional Council on policies and practices. The Committee met on a quarterly basis starting in September 2020 and concluding in March 2021, culminating in the development of an early action plan.

The Racial Equity Early Action Plan (EAP) was grounded in SCAG's working definition of equity that led with race as a focal point in addressing the pervasive and deep inequities faced by people of color across the region. The EAP included overarching goals and strategies to advance racial equity through SCAG's policies, practices, and activities. The plan's goals included:

- Shifting the Organizational Culture;
- Centering Racial Equity in Regional Policy & Planning;
- Encouraging Racial Equity in Local Planning Practices; and
- Activating and Amplifying SCAG and others' commitment to advancing equity.

Each of these goals was meant to be advanced through a focus on the following strategies:

- Listen & Learn: Develop a shared understanding of our history of discrimination and the structural barriers that continue to perpetuate the inequities experienced today;
- Engage & Co-Power: Create an environment where everyone is included, able to share their experiences, and equipped to talk about racial equity and inequities; and
- Integrate & Institutionalize: Focus on systems change to improve racial equity. Center racial equity in all aspects of work. This involves internal and external systems change.

IMPLEMENTATION:
The EAP included a total of 29 actions fairly evenly split across all the goals and strategies. Progress on all actions is reported in Attachment 1. A selection of actions is highlighted below, along with a handful of new actions that were not originally accounted for that have been initiated and have secured support from the Regional Council. As noted at the time of adoption, the EAP is anticipated to continue to be a "living document," with opportunities to identify new actions over time.

Shifting the Organizational Culture

Develop an Inclusion, Diversity, Equity, and Awareness (IDEA) Education and Training Program
SCAG's Human Resources Division recently secured consultant support for equity-related work, including education and training, developing a baseline assessment report of SCAG's current organizational practices; and assessing the level of inclusion, diversity, and equity awareness and competency to identify opportunities for improvement and priorities.

Prepare an Inclusive and Equitable Talent Management Strategy
SCAG's Human Resources Division initiated new practices to further embed diversity, equity, inclusion, and accessibility within the recruitment process. Specifically, SCAG's job posting template was revamped to emphasize minimum qualifications over ideal qualities, and all candidates who meet the minimum qualifications of a position are sent over for subject matter expert review. Interview rating materials have been updated with a numerical rating scale to provide more objectivity in the interview assessment process, and the interview panel views a video on bias mitigation in the interview process. The descriptions of the competencies for which candidates are evaluated as well as the interview questions SCAG uses have been updated to reflect more inclusive and diverse verbiage. SCAG is also supporting accessibility throughout the interview process by conducting remote interviews and copying and pasting interview questions into the chat function of the virtual meeting for candidates to reference as they respond to the interview questions.

Centering Racial Equity in Regional Policy & Planning

Update Public Participation Plan
SCAG updated its Public Participation Plan to include several goals and strategies to ensure the agency's communications are looked at through an equity framework whenever possible. As a part of a more equitable outreach and engagement approach, SCAG intends to seek the support of Community-Based Organizations to target specific populations and areas of the region as it develops its next long-range plan, Connect SoCal 2024.

Prepare Annual Racial Equity Indicators Report
In 2021, SCAG released a baseline assessment of racial equity in Southern California. The report highlighted past transportation and housing policies and practices that yielded the inequitable conditions that exist today and provided an assessment of existing disparities and inequities. SCAG staff anticipate sharing an updated report this summer once updated data becomes available.

Restorative Justice Subcommittee (new)
As a part of the proposed Connect SoCal Policy Development Framework, SCAG will be convening a set of special subcommittees to consider emerging issues. One of the subcommittees will focus on Restorative Justice. This subcommittee will identify opportunities to advance racial equity through the policies and strategies in Connect SoCal and guide how planning and investments over the next 30 years can address and rectify the effects of racially discriminatory policies in SCAG's Environmental Justice communities.

Encouraging Racial Equity in Local Planning Practices

Call for Collaboration

Last year the Regional Council voted to approve $1 million of SCAG's REAP 1.0 grant funding to establish the Call for Collaboration partnership program with the intent to support new partnership models and engage a wider range of stakeholders to advance the region's housing goals. SCAG partnered with the California Community Foundation (CCF), joined by the Irvine Foundation, Chan Zuckerberg Initiative, and other funding partners for this program. The program was designed to fund community-based organizations and non-profit led activities that result in action-oriented planning policies and programs demonstrating a nexus to accelerating housing production. This collaboration fosters diverse community-driven approaches and strategic coalitions to shape and execute a vision for more housing in every community while addressing historic racial inequities.

CCF and SCAG procured a technical assistance provider, to be funded by the foundation partners, to support the grant program awardees in their planning activities. CCF released the Request for Proposals for the grant program on January 19, 2021, offering funding in two categories:

- **Partnership Programs:** Awards of up to $125,000 to support the expansion and/or implementation of existing plans, initiatives, and/or partnerships that promote equitable growth strategies.
- **Spark Grants:** Smaller, capacity-building grants of around $50,000 (1) to seed new models of collaboration and engagement to support community-driven approaches and partnerships that promote equitable growth strategies.

The grant program was oversubscribed by four (4) times, and fifteen (15) awards were made totaling $1.25 million. These awards were made to a range of non-profit and community-based organizations covering five of SCAG's six counties. Through its partner, CCF, awardees are now in grant agreements and implementing their grant-funded work. The period of performance is 18-months from execution of the grant agreement.

Economic Empowerment Program (new)
Recent restructuring within SCAG's Planning Division have created an opportunity to form a new Economic Empowerment Program. SCAG is in the process of recruiting and hiring staff for the new team, which will include a department manager with shared responsibilities for Housing and Economic Empowerment, as well as, a senior planner and associate regional planner dedicated to Economic Empowerment. The team will oversee several EAP action items to build capacity to incorporate equity into local planning including the implementation of Sustainable Communities Program Call 4 efforts (projects focused on Civic Engagement, Equity, and Environmental Justice) as well as the Public Health Fellows program.

Activating and Amplifying

Develop an Excellence in Equity Annual Award Program

SCAG's Sustainability Awards Program now includes an equity category to highlight projects that advance equity and facilitate the growth of healthy, livable, sustainable, and economically resilient communities. SCAG anticipates issuing the first award at the Regional Conference in May.

Inclusive Economic Growth Implementation Program (new)
The Inclusive Economic Recovery Strategy (IERS) was developed through a rigorous public outreach Following adoption of the Inclusive Economic Recovery Strategy in July 2021, SCAG was awarded $3.5 million in State funding to implement IERS core recommendations. This work is anticipated to kick off in mid-2022. Deliverables will include: a targeted analysis of the economic impacts of racial inequities in income; the creation of a job-quality index; reports and recommendations on best practices for more inclusive procurement and contracting; recommendations for best practices on project labor agreements, construction, and development; and sub-regional reports on sectors with family-supporting jobs combined with addressing the human capital needs for households to access those jobs (such as childcare, transportation, training). The grant funding is structured to fund community-based partners that can ground-truth the research and findings with the lived experiences of targeted communities.

NEXT STEPS:
SCAG staff will continue to take steps to implement the EAP and share periodic updates with the EEC and other policy committees to ensure progress and accountability. New actions that are underway that have secured approval from the Regional Council will be incorporated into an updated EAP.

FISCAL IMPACT:
Funding for staff work associated with this item is included under various projects and programs in the FY 2021-22 Overall Work Program.

ATTACHMENT(S):
1. PowerPoint Presentation - Racial Equity Early Action Plan – Progress Report
2. Racial Equity Early Action Plan – FY22 Progress Report Table

SCAG's Equity Efforts
Racial Equity Early Action Plan – Progress Report

Energy & Environment Committee

April 7, 2022

www.scag.ca.gov

SCAG's Commitment to Equity & Social Justice

- July 2020 - SCAG Board adopted resolution

- Sept. 2020 – Established Special Committee on Equity & Social Justice

- Focused on:
    - SCAG's response to advancing equity across agency's activities

    - Advising SCAG's Regional Council on policies and practices

SEPT. 2020
- SCAG Overview and Work Program
- Committee Purpose
- Defining Equity
- Special Presentation on Transportation Inequities from Mr. Charles Brown of Equitable Cities: "Arrested Mobility"

NOV. 2020
- Regional Equity Discussion
- SCAG Activities:
    - Defining Equity
    - Equity Inventory
    - Diversity, Equity, & Inclusion (DEI) Work Plan
    - Public Participation Plan

JAN. 2021
- Draft Racial Equity Framework & Early Action Plan
- Inclusive Economic Recovery Strategy – Work Plan & Draft Framework

MAR. 2021
- Early Action Plan
- Final Recommendatio[n]

Equity Framework & Early Action Plan

- Early Action Plan critical for ensuring work advances and endures

- Early Action Plan included:
    - Definition of equity
    - Equity goals and strategies
    - Early actions

Racial Equity Framework: Goals & Strategies

GOALS

Shift Organizational Culture

Focus SCAG's internal work and practices on inclusion, diversity, equity, and awareness.

Center Racial Equity in Regional Planning & Policy

Bring equity into SCAG's regional planning functions.

Encourage Racial Equity in Local Planning Practices

Promote racial equity in efforts involving local elected officials and planning professionals.

Activate & Amplify

Communicate broadly SCAG's commitment to racial equity and join with others in different fields and sectors to amplify impact.

STRATEGIES

Listen & Learn

Develop a shared understanding of our history of discrimination and the structural barriers that continue to perpetuate the inequities experienced today.

Engage & Co-Power

Create an environment where everyone is included, able to share their experiences, and equipped to talk about racial equity and inequities.

Integrate & Institutionalize

Focus on systems change to improve racial equity. Center racial equity in all aspects of work. This involves internal and external systems change. Advancing Racial Equity in Southern California.

Racial Equity Early Action Plan

Shifting the Organizational Culture

- Inclusion, Diversity, Equity, and Awareness (IDEA) Education and Training Program

- Inclusive and Equitable Talent Management Strategy

- Update SCAG's Strategic Plan to incorporate an equity vision and goals

Centering Racial Equity in Regional Policy & Planning

Updated Public Participation Plan

Regional Equity Working Group

Connect SoCal 2024 – Equity Analysis

Restorative Justice Subcommittee (new)

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Encouraging Racial Equity in Local Planning Practices

Resources for CBO engagement:
Call for Collaboration, *Go Human* Mini-Grants

Toolbox Tuesday Trainings

Economic Empowerment Program (new)

8

Activating and Amplifying

Develop an Excellence in Equity Annual Award Program

Planning University for Community-Based Organizations and Stakeholders

Inclusive Economic Growth Implementation Program (new)

Next Steps

SCAG staff implements the Racial Equity Early Action Plan

Regional Council receives periodic updates on implementation

Thank you!

Questions?

Courtney Aguirre, Program Manager

aguirre@scag.ca.gov

www.scag.ca.gov

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Shift Organizational Culture	Develop an Inclusion, Diversity, Equity, and Awareness (IDEA) Education and Training Program.	In-Progress	Secured consultant support for equity-related work, including education and training, developing a baseline assessment report of SCAG's current organizational practices; and assessing the level of inclusion, diversity, and equity awareness and competency to identify opportunities for improvement and priorities.
Shift Organizational Culture	Conduct an externally led racial equity audit to further inform equity actions.	In-Progress	Strategic Plan Consultant is being onboarded and will be discussing the scope and timing.
Shift Organizational Culture	Establish an IDEA Team to oversee and update EAP.	Completed	The IDEA team, consisting of 17 cross-functional SCAG team members, underwent a foundational knowledge workshop series titled "IDEA Foundations," where a shared language of DEI principles was established. With both the addition of a DEI Principal Management Analyst position in HR, and the execution of a contract between a DEI consultant firm in Spring, the IDEA team will reconvene to continue working toward shifting the organizational culture.
Shift Organizational Culture	Assess and align procurement policies with diversity goals.	In-Progress	The Regional Council authorized staff to include the project budget within a Request for Proposal (RFP) when including the project budget is deemed by staff to be in the best interest of SCAG. Service providers will consider the best use of their limited staffing resources when deciding whether to respond to RFP's, and the evaluation of the adequacy of project funding is a key consideration. Small, woman, DVBE and minority owned businesses are more likely to face the challenge of limited staffing resources, thus RFPs that do not provide project budget information may disproportionately disincentivize or prohibit these service providers from bidding.
Shift Organizational Culture	Create an Equity Planning Resource Group to share best practices.	Completed	SCAG has established an Equity Planning Resource Group that is currently focused on developing an equity toolkit to help institutionalize equity in the Planning Division, and the group has also developed an equity resource guide to support local jurisdictions as they take on advancing equity.
Shift Organizational Culture	Develop a Diversity Style Guide on standards for communication.	In-Progress	Public Affairs will work with HR to incorporate an Equity Style Guide into DEI Consultant work.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Shift Organizational Culture	Update SCAG's Strategic Plan to incorporate an equity vision and goals to guide agency work plans.	Planned	Consultant is being on-boarded and the first task order being developed will include DEI components.
Shift Organizational Culture	Prepare an Inclusive and Equitable Talent Management Strategy.	In-Progress	SCAG HR initiated new practices to further embed diversity, equity, inclusion, and accessibility within the recruitment process. SCAG's job posting template was revamped to emphasize minimum qualifications over ideal qualities, and all candidates who meet the minimum qualifications of a position are sent over for subject matter expert review. Interview rating materials have been updated with a numerical rating scale to provide more objectivity in the interview assessment process, and the interview panel views a video on bias mitigation in the interview process. The descriptions of the competencies for which candidates are evaluated as well as the interview questions SCAG uses have been updated to reflect more inclusive and diverse verbiage. SCAG is also supporting accessibility throughout the interview process by conducting remote interviews and copying and pasting interview questions into the chat function of the virtual meeting for candidates to reference as they respond to the interview questions.
Center Racial Equity in Regional Policy & Planning	Offer equity training for Board members, including as part of Board Orientation.	In-Progress	SCAG's equity efforts are incorporated into New Member Orientation presentations and onboarding materials. Resources from GARE and other publications will be shared with members. A formal training program will be proposed to Human Resources as part of their DEI Consultant initiatives.
Center Racial Equity in Regional Policy & Planning	Include Equity Assessment section in Staff Reports.	Planned	An equity section based on the forthcoming equity vision and goals incorporated in SCAG's Strategic Plan is anticipated to be added to the staff report template in MinuteTraq. Evaluating a date when it will become effective (requires advance staff training).
Center Racial Equity in Regional Policy & Planning	Prepare Annual Racial Equity Indicators Report.	In-Progress	In 2021, SCAG staff developed a baseline assessment of racial equity in Southern California. The report highlighted past transportation and housing policies and practices that yielded the inequitable conditions that exist today and provided an assessment of existing disparities and inequities. SCAG staff anticipate sharing an updated report this summer.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Center Racial Equity in Regional Policy & Planning	Increase opportunity for participation in Policy Committees; Formalize Committee equity roles.	Completed	Coinciding with the adoption of the Racial Equity Early Action Plan, last May SCAG's Bylaws were amended to expand Policy Committee membership to include Communities of Concern representatives to create a more inclusive governance structure.
Center Racial Equity in Regional Policy & Planning	Update Public Participation Plan.	Completed	SCAG updated the Public Participation Plan to include several goals and strategies to ensure SCAG's communications are looked at through an equity framework whenever possible. The Regional Council will consider approving the document at its April meeting.
Center Racial Equity in Regional Policy & Planning	Form Regional Policy Working Group dedicated to Equity.	Completed	Quarterly, SCAG staff convenes a Regional Equity Working Group to engage stakeholders on SCAG's equity-focused regional and local planning activities as well as uplift efforts across the region to advance equity in land-use and transportation planning.
Center Racial Equity in Regional Policy & Planning	Develop equity goals, policies, and metrics as part of Connect SoCal update.	In-Progress	SCAG staff are currently researching and developing Connect SoCal equity-oriented goals and performance measures, and reevaluating the plan's environmental justice analysis by shifting to an equity analysis to further align with SCAG's equity efforts.
Center Racial Equity in Regional Policy & Planning	Explore developing Research Program with University Partners.	Planned	SCAG staff are currently developing a proposal for a University Collaboration rooted in equity to create more opportunities for participatory and collaboratively applied research projects with university partners. SCAG staff are also currently working with UC Davis on a COVID and associated travel behavior study that includes analysis of impacts on high need populations.
Center Racial Equity in Regional Policy & Planning	Form a Restorative Justice Subcommittee to inform work on Connect SoCal (**new**).	Planned	This subcommittee will identify opportunities to advance racial equity through the policies and strategies in Connect SoCal and guide how planning and investments over the next 30 years can address and rectify the effects of racially discriminatory policies in SCAG's Environmental Justice communities.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Encourage Racial Equity in Local Planning	Support data requests, create tools for information sharing.	In-Progress	SCAG staff are currently conducting outreach to local jurisdictions in the region, including those that are low-resourced and located in Disadvantaged Communities, to introduce the available tools and resources in the Regional Data Platform (RDP). One of the immediate benefits of the RDP is a set of complementary ArcGIS licenses, which could support jurisdictions with planning activities like Housing Element updates. The Local Information Services Team (LIST) at SCAG are ready to provide technical assistance upon request.
Encourage Racial Equity in Local Planning	Expand Toolbox Tuesday trainings to include sessions on racial equity.	Completed	On a quarterly basis, SCAG hosts equity-focused Toolbox Tuesday trainings for practitioners. To-date, SCAG has held three trainings on the following topics: developing equity baseline conditions reports, conducting equitable engagement, and developing and utilizing equity tools.
Encourage Racial Equity in Local Planning	Provide elected officials with fact sheets and tools to promote racial equity.	In-Progress	SCAG's equity efforts are incorporated into New Member Orientation presentations and onboarding materials. Resources from GARE and other publications will be shared with members.
Encourage Racial Equity in Local Planning	Provide resources for CBO engagement in Local Planning - e.g., Call for Collaboration, Go Human Mini-Grants.	In-Progress	In the past year, SCAG issued a Call for Collaboration in partnership with three foundations. SCAG provided $1 million of its REAP 1.0 funding to develop a program that provided capacity-building technical assistance and grants to non-profits and CBOs. Fifteen organizations were invited to engage in land use planning efforts that support the acceleration of housing production, with an emphasis on ensuring principles of equity are included in planning processes, new funding programs, and policies. The Go Human Safety Strategies contract is anticipated to kickoff this spring. The contract includes resources for CBO engagement. The Go Human Mini Grants Call for Applications is also anticipated in spring 2022.
Encourage Racial Equity in Local Planning	Build planning capacity in low-resourced jurisdictions by providing staff support - e.g., Civic Sparks, Public Health Fellows.	In-Progress	SCAG is currently funding Public Health & Policy Fellows in a variety of jurisdictions, including Eastvale, Fontana, Los Angeles, Montclair, and Riverside. SCAG staff are exploring grant funding options for next fiscal year, including possible REAP 2021 funding.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Encourage Racial Equity in Local Planning	Refine equity goals and evaluation criteria used in Sustainable Communities Program (SCP).	In-Progress	Throughout three Calls for Applications completed in 2020/2021, SCAG prioritized equity criteria in the project evaluation and program goals. Specifically, the evaluation criteria required applicants to discuss anti-displacement strategies for all projects, and discuss how projects will engage community-based partners and the most impacted communities, including non-English speaking populations. The program goals point to prioritizing disadvantaged communities in alignment with SCAG's resolution on race and equity. Additionally, staff developed an Equity Tool to prioritize outreach to high need areas based on a series of data-driven equity indicators and past funding SCP, to target communities with the highest need and those who historically have not received SCP funding.
Encourage Racial Equity in Local Planning	Provide resources through the Sustainable Communities Program to promote Environmental Justice.	Planned	Developing SCP Call 4, Civic Engagement, Equity and Environmental Justice, to support the goals and implementation of the Racial Equity Early Action Plan. Through strategic funding set-asides, this program, SCAG will prioritize resources in historically disinvested areas and communities most impacted by adverse public health outcomes and air quality impacts. This program will catalyze planning activities to support GHG and VMT reduction, advance equity and environmental justice, and provide needed funding to communities with the highest need.
Encourage Racial Equity in Local Planning	Identify opportunities to incorporate equity analysis in development of 2023 Federal Transportation Improvement Program (FTIP).	In-Progress	Based on the adopted FTIP Guidelines, County Transportation Commissions are encouraged to consider equity in developing their respective County TIPs, which could be in the form of an equity statement or consideration of equity in project selection. Once SCAG is in receipt of the County TIPs, staff will prepare a regional equity statement to be included in the Final FTIP. This document will identify/quantify investments in non-auto modes, particularly transit and active transportation, given that Disadvantaged Communities or Communities of Concern tend to have low levels of auto ownership and therefore greater dependence on non-auto modes.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Encourage Racial Equity in Local Planning	Form Economic Empowerment Program (**new**).	In-Progress	SCAG is in the process of recruiting and hiring staff for the new team, which will include a department manager, senior planner, and associate regional planner. The team will oversee the Sustainable Communities Program Call 4 efforts (projects focused on Civic Engagement, Equity, and Environmental Justice) as well as the Public Health Fellows program.
Activate & Amplify	Collaborate on a public information campaign to promote fair housing, reduce segregation.	Planned	SCAG designated funding for the development of a community outreach and advertising campaign with the goals of creating positive associations with housing development and housing-supportive land use policies. This effort will be modeled on the success of SCAG's Go Human campaign. Staff began to research several similar, active efforts, and found that the Chan Zuckerberg Initiative (CZI) has been working with a marketing and branding firm on a market segmentation analysis, identifying core values associated with housing development. CZI is currently testing various slogans developed based on the outcomes of the market research. SCAG staff is proposing to coordinate with CZI and other partners (foundations, community based and municipal) to use these market-tested slogans and develop and launch the campaign materials and toolkits.
Activate & Amplify	Strengthen relationships with other MPOs.	In-Progress	On a bimonthly basis, SCAG works with others to convene an MPO Equity Working Group to discuss current equity efforts, challenges, and best practices. The past year's meetings have focused on performance measures, partnering with community-based organizations, environmental justice analysis, and equity tools. SCAG also participates in the California Association of Councils of Governments Big MPO + Caltrans meetings to discuss experiences advancing equity and share resources.
Activate & Amplify	Explore opportunities to partner to establish a "Planning University" for Community-Based Organizations & Stakeholders.	In-Progress	"Planning University" concepts have been incorporated into the scope development for the Connect SoCal 2024 public and stakeholder engagement consultant, including establishing a Pre-Plan Development phase to build interest and capacity for stakeholders to meaningfully participate in the regional and local decision-making processes that shape their communities.

SCAG's Racial Equity Early Action Plan
Fiscal Year 2021-22 Progress Report

Goal	Action	Status	Notes
Activate & Amplify	Develop an Excellence in Equity Annual Award Program.	Completed	SCAG's Sustainability Awards Program now includes an equity category to highlight projects that advance equity and facilitate the growth of healthy, livable, sustainable, and economically resilient communities.
Activate & Amplify	Develop Inclusive Economic Recovery Strategy.	Completed	The Inclusive Economic Recovery Strategy (IERS) was developed through a rigorous public outreach and engagement process, including 20 convenings with stakeholders from the private, public, and government sectors. The resulting Inclusive Economic Recovery Strategy Report and recommendations were adopted by the Regional Council on July 1, 2021.
Activate & Amplify	Inclusive Economic Growth Implementation Program (**new**).	Planned	Following adoption of the Inclusive Economic Recovery Strategy in July 2021, SCAG was awarded $3.5 million in State funding to implement IERS core recommendations. This work is anticipated to kick off in mid-2022.

Southern California Association of Governments

April 7, 2022

To:	Community, Economic and Human Development Committee (CEHD)	**EXECUTIVE DIRECTOR'S APPROVAL**
From:	Jenna Hornstock, Deputy Direcotr of Planning, Land Use (213) 630-1448, hornstock@scag.ca.gov	*Kome Ajise*
Subject:	Presentation on Chan Zuckerberg Initiative's Housing Narrative Research	

RECOMMENDED ACTION:
Information Only – No Action Required

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal 1: Produce innovative solutions that improve the quality of life for Southern Californians. 2: Advance Southern California's policy interests and planning priorities through regional, statewide, and national engagement and advocacy.

EXECUTIVE SUMMARY:
As part of the $47 million Regional Early Action Plan (REAP) program, SCAG committed to exploring development of a pro-housing campaign that could offer broad narrative tools and strategies to subregional and local partners in support of efforts to meet the housing needs identified in the 6th cycle Regional Housing Needs Allocation (RHNA) process. The Chan Zuckerberg Initiative (CZI) recently made a significant investment in a market segmentation study to develop evidence-based narratives around housing that resonate with a broad base of stakeholders across California. Staff from CZI will provide an overview of their recently published white paper entitled The California Dream: A New Narrative to Engage Californians on Housing Affordability. Following the presentation staff will discuss next steps for this effort including a REAP-funded partnership with United Way of Greater Los Angeles.

BACKGROUND:
Building on the success of SCAG's Go Human campaign, SCAG's REAP 1 grant includes funding set aside to develop a messaging campaign and related flexible materials and toolkits that can support subregional partners and elected officials in their efforts to meet the region's housing needs through land use planning, policies and projects. In researching other efforts and best practices, SCAG's housing team learned that the Chan Zuckerberg Initiative (CZI) had committed a significant investment in a market segmentation study to develop evidence-based narratives that could support pro-housing policies and solutions to the State's housing crisis.

The CZI Research Effort

CZI partnered with Senior Advisor, Dr. Tiffany Manuel, and a five-organization Steering Committee representing various geographies across the state to advise on a technical mixed-methods research study examining and analyzing Californians' sentiment and underlying values towards housing issues. CZI's premise was that identifying a unifying narrative framework and a set of corresponding messages could shift attitudes and values in support of housing reforms that produce more housing, preserve affordability, and prevent displacement and homelessness. This effort could support policy makers and housing advocates to advance a wide range of meaningful housing policies across the state that align with Californians' values — whatever they may be.

Using a methodology relatively unique to the social justice field, CZI collected the most comprehensive California-based dataset on perceptions of the housing crisis and then tested narrative frames and specific messages by segments across the state and monitored changes in housing-related values in response to more effective narratives. As far as we know, it is the first and most comprehensive approach of its kind.

In January 2022, CZI, through its research partnership with Dr. Tiffany Manuel, Gradient Metrics, the Youngblood Group, Protagonist and Elizabeth Stroud, published a white paper with the results of its research efforts. That white paper, *The California Dream: A New Narrative to Engage Californians on Housing Affordability*, is attached to this staff report and the results will be presented to the CEHD committee.

Next Steps: Implementation

Based on the results and feedback from the field, CZI is investing with three (3) partners across the state to develop an implementation strategy that can bring this narrative work to the local level, including a toolkit and suite of trainings to empower elected officials, staff, advocates, and supporters to use research insights and align on a shared foundational narrative framework around housing. CZI's anchor partner in Southern California is United Way of Greater Los Angeles, which is developing recommendations for narrative and advocacy investments in 2022 and beyond. United Way is creating a $5M initiative to create toolkits and shift the narrative around housing. Committed investors in the fund include CZI and the Conrad M. Hilton Foundation, with others in the works.

As part of the RC-approved REAP 1 funding program, SCAG has allocated $200,000 toward development of a pro-housing campaign. Staff is directing this funding to leverage the significant private/philanthropic investment in the CZI Narrative strategy, to support development of toolkits that can be deployed at the local level. This approach will provide tools to electeds, staff, developers and advocates to support programs, policies and projects that meet 6th cycle RHNA and Housing Element goals, and is modelled on the success of SCAG's Go Human campaign.

The Chan Zuckerberg Initiative (CZI)

The Chan Zuckerberg Initiative was founded in 2015 to help solve some of society's toughest challenges — from eradicating disease and improving education, to addressing the needs of our local communities. Their mission is to build a more inclusive, just, and healthy future for everyone. Across its focus areas—Science, Education, Community and alongside various Justice & Opportunity partners, CZI pairs technology, with grantmaking, impact investing, and collaboration to help accelerate the pace of progress towards an equitable future. CZI works at the intersection of philanthropy and technology, while supporting movement and capacity building to achieve progress across our focus areas with a diversity, equity, and inclusion lens.

The Presenter

Adina Abeles is a Research Science Manager on the Public Opinion and Survey Science Research Team at the Chan Zuckerberg Initiative (CZI). In this role, she conducts research in support of CZI's programs and grantees, including a recent effort to better understand how Californians view the housing affordability landscape. Prior to joining CZI, Adina earned her PhD in Communication from Stanford University, where she was a Goldman Graduate Fellow at the Stanford Woods Institute for the Environment. She earned her Masters in Environmental Science and Management from UC Santa Barbara and has worked at various non-governmental organizations aimed at connecting science and policy.

FISCAL IMPACT:

Funding for this work is in included in the FY22 budget under 300.4889.04.

ATTACHMENT(S):

1.   CZI-The-California-Dream-Housing-White-Paper

Chan Zuckerberg Initiative

The California Dream

A New Narrative to Engage Californians on Housing Affordability

This white paper outlines research conducted by the Chan Zuckerberg Initiative's (CZI) Public Opinion and Survey Science research team, in partnership with CZI's Housing Affordability team, to identify a unifying narrative to shift attitudes and values in support of housing reforms across California. Designed as a resource for housing advocates, we hope this research adds evidence-based depth and breadth to advance pro-housing policies and practices, build on existing expertise from the field, and help ensure every Californian has a safe, stable, and affordable place to call home.

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About the Project

The Chan Zuckerberg Initiative (CZI) was founded in 2015 to help solve some of society's toughest challenges — from eradicating disease and improving education, to addressing the needs of our local communities. Our mission is to build a more inclusive, just, and healthy future for everyone. Across our focus areas — science, education, community, and alongside our justice & opportunity partners — we pair technology with grantmaking, impact investing, and collaboration to help accelerate the pace of progress toward a more equitable future.

CZI's Housing Affordability program is dedicated to improving housing affordability and access so people from all backgrounds and income levels can live, work, and thrive statewide. We aim to support front-line organizations that are working to dismantle racial and economic inequities in our housing system through grantmaking, policy change, innovative investments, advocacy support, research, and storytelling.

Building political and public will through narrative change is one of the key levers for creating a sustained movement for housing reform. We hope the information offered by this white paper can help advocates implement long-term strategies for narrative change at scale across California.

Our in-house Public Opinion and Survey Science (POPSS) research team designs and executes first-party, rigorous social and behavioral science research in service of CZI's mission. Working with teams across CZI and often directly with grantees, POPSS applies expertise in public opinion, survey science, and advanced statistical techniques to inform and accelerate CZI's strategy and goals.

The solutions to California's housing problems are many, but they will involve the three "Ps" of housing: Production, Preservation, and Protection.
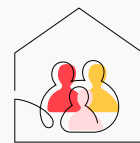

Production
Increase the supply of housing

Preservation
Keep our existing stock of homes affordable

Protection
Protect residents from displacement

Executive Summary

Toward a Broad, Unifying California Housing Narrative

This project set out to identify a unifying narrative and set of corresponding frames and messages to support CZI's grant partners and other housing advocacy groups as they work to shift voter attitudes and values in support of housing reform across California. The ultimate goal was to identify a shared foundational, long-term narrative framework with accompanying messaging to equip housing advocates with communications tools to build greater public and political will. We hope this research builds on existing expertise from the field of housing advocates and offers new tools to advance a range of important advocacy priorities related to housing production, protection, and preservation.

Digging deep into California voters' values and views, CZI's Public Opinion and Survey Science (POPSS) research team has generated and tested a narrative to help advocates position housing as a basic right rather than a privilege. We hope this will open a pathway for advocates to advance new ideas and practical solutions and ensure that all Californians have the safe, affordable, stable housing everyone deserves.

Our rigorous, multi-year research identified a broad narrative, the *California Dream*, that is effective at meeting Californians where they are — across a range of political identities, values, and beliefs.

Meeting — and Moving — People Via Their Values

This research is rooted in an approach wherein advocates are equipped to more effectively meet people where they are, then move their values and attitudes to be more supportive of pro-housing policies and practices, using the most persuasive narrative strategy. Part of this approach means not writing off any large group of voters as unreachable, or heightening existing tensions, and instead focusing on making inroads with all groups over time. Our hope is that the California Dream narrative will support housing advocates to engage the audiences they are actively reaching and pursuing now, while also offering an effective tool to engage and persuade an even wider audience over the long haul.

This approach is necessary to achieve strategic, high-impact housing wins across California — and we believe it's possible given early results from the research. Values-driven narratives can help housing advocates define for audiences across California what housing reform and housing affordability mean. We believe this will make electoral and legislative wins possible while simultaneously working to shift broad public perception over the long term.

Moreover, our research shows that California voters hold conflicting beliefs about housing reform and housing affordability, and these beliefs don't necessarily map onto traditional political identities (e.g. Democrat, Republican, Conservative, Liberal, etc.) or demographic identities of gender, race, ethnicity, or class. This presents a unique opportunity — before housing affordability in California becomes even more polarized — to identify and test a broad, unifying narrative of housing affordability that a majority of California voters will find palatable, compelling, and actionable.

The narrative frame and messages resulting from this research are designed for an audience of California registered voters and tailored to speak to their dominant values with regard to housing reform. The narrative frame and messages are specifically geared toward increasing the likelihood that a broad cross section of California voters will: 1) support policies and solutions that will achieve greater housing affordability across the state; 2) take action on housing affordability policies and campaigns; and 3) see housing as a basic right rather than a privilege.

We chose to test various narratives with voters — rather than a broader cross section of California residents — because voters are the most immediate path to electoral and legislative progress. In order for these narrative tools to be useful for housing advocates in their efforts to advance reforms, the narratives must be effective in electoral and legislative contexts — which means they had to be effective with voters.

The broad and unifying approach offered here is not intended as a substitute for, but rather as complement to, the strategies that housing advocates are already pursuing. In the short term and for specific electoral and legislative efforts, the California Dream narrative can be deployed in support of the wide range of policies and practices that advocates are advancing to improve housing access and affordability across the state. As this

new narrative begins to take hold, we expect that advocates will be better equipped to more effectively engage a broader and bigger group of Californians in future efforts toward housing reform.

Breakthrough Narrative: The California Dream

After nearly three years of planning, deep listening, careful design, rigorous research, analysis, and iteration, we are pleased to share that we've identified a broad, unifying narrative for our grant partners and other housing advocacy groups to use — a narrative that is effective at engaging the range of voters who hold divergent values and attitudes, and moving them toward supporting housing solutions.

We've tested this narrative with California voters who hold multiple, overlapping, and often conflicting beliefs about housing issues. The California Dream narrative is the culmination of our robust research to find an effective narrative that advocates can use to meet a broad cross section of California voters where they are in order to garner more support for housing reforms over the short and long term. The California Dream narrative frame was one of the most compelling in our tests and was most effective at persuasion and engagement when used in messaging. This frame also proved effective for use in advocating a range of solutions on housing.

This narrative — focused on redefining the American Dream in a way that works for Californians — is effective at moving voters to support housing

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WINNING HOUSING NARRATIVE: THE CALIFORNIA DREAM

> **It's about time we redefine the American Dream, and we Californians are the right ones for the job.**

We need to reboot our idea of the American Dream to reflect the values of our present-day state. Californians know that when we bring people together from all different walks of life, we're able to spark new ideas, pioneer groundbreaking innovations, and solve big problems the Californian way. That's why we need to ensure we build communities where people from different incomes, beliefs, and backgrounds can live, work, and create the California Dream together.

The California Dream of an inclusive, hopeful future must be open to people from all kinds of backgrounds and all walks of life. Every Californian has the right to a decent place to live, regardless of race or income, so they can be a part of our shared future.

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as a basic right, to support production of housing in their communities, and to increase their likelihood to take action in support of housing solutions.

Even in the context of entrenched prior narratives and an increasingly heated public debate over how to best address California's housing crisis, this narrative frame, along with its accompanying messaging, is effective at shifting voters toward actionable solutions.

Our research demonstrates this narrative can be effective in building the broad coalitions our grant partners and other housing advocacy groups need to win housing solutions at scale. By linking this narrative frame with specific messaging on solutions, housing advocates have a powerful new tool at the ready in their ongoing efforts to ensure that all Californians have a safe, stable home in thriving communities throughout the Golden State.

A Modular, Flexible Narrative Tool

The flexibility of this narrative frame is one of its chief advantages. It's compelling to voters at a high level and is effective for a range of persuasion and messaging contexts — more effective than other frames and messages we tested. This may be helpful for housing advocates working to advance a wide range of issues, approaches, engagement, and action amongst diverse audiences throughout California to do so in a way that builds a consistent statewide narrative. Grant partners and their allies across the housing field can deploy the California Dream narrative frame in a variety of ways that are valuable to their efforts, paired with messages to move the outcomes most important to them.

We hope advocates across the state will be able to make use of this broad, unifying narrative throughout their work. Ultimately, this narrative softens the ground to work across many efforts and approaches, supporting advocacy work spanning a range of much needed solutions to the ongoing housing crisis in California.

Narrative Change for the Long Haul

Across California, housing advocates are doing important and impactful work, whether focused on local zoning initiatives, statewide ballot measures, or neighborhood organizing. This work encompasses a wide range of strategies with many different stakeholders, and often with varied solutions to the housing crisis.

But they have also confronted deep-rooted narratives that are counterproductive to their efforts for change. Some of these tropes focus only on the problems, or only on technical solutions without the context of a larger vision. Others construct housing as a market good or commodity, making efforts to secure affordable housing for all more challenging. This results in an uphill battle for many important policy initiatives on housing preservation, protection, and production.

The often localized nature of housing advocacy work — and specifically the targeted messaging it takes to run tailored campaigns, engage with local decision-makers and the general public, and ultimately secure concrete housing wins — means that resources dedicated to strategic communications and narrative work tend to be short-term, campaign-based, and often reactive. Similarly, housing advocacy and messaging research are often focused on one specific policy at a time, or in just one of the three approaches of preservation, protection, and production. In short, these efforts are not designed to converge to change the larger narrative context in which those fights take place.

Housing advocates across California are ready for an effective narrative approach that will help them make progress. Our research suggests there is a tremendous opportunity for a cohesive narrative that helps connect local communities across the state. The evidence-based narrative frame we've identified is both broad and deep; broad in that it can be used to appeal to all kinds of California voters, and deep in that it is informed by and speaks to their values.

Research Methods

Over the last three years, we have collected deep qualitative and quantitative data exploring the perceptions, values, opinions, and ideas California voters hold toward housing in the state. We've tested narrative frames and specific messages by mindset segments across the state and monitored changes in housing-related values and attitudes. As far as we know, this is the first and most comprehensive approach of its kind, and we are eager to share our findings with other narrative researchers and housing advocates who can put these ideas into action. Further details on the research methodology can be found in the appendix on page 35.

The target population for all research is registered California voters and is weighted to reflect that population using the most recent Current Population Survey Census benchmarks. All respondents are provided the option to opt out of the survey at any time. Responses are discarded if they have a high frequency of straightlining responses (e.g., consistently answering the same across multiple questions). All panelists have their identity verified to ensure they are real panelists and not from a bot farm. For those who complete the survey, they are provided with a nominal financial incentive for their participation. Where quantitative results are compared, the differences presented are statistically significant at a p-value of 0.05 or below.

Narrative, Defined

Today, advocates are placing increased focus on narrative as a means of advancing social change. But, as in any evolving discipline, it can be helpful to hone in on shared understanding of terms in practice. The ideas below are offered as a means of clarifying the context for — and usages of — the narrative research offered here.

NARRATIVE

Narrative, says Joseph Phelan of ReFrame, is "a collection or system of related stories that are articulated and refined over time to represent a central idea or belief." It's the story people have in their heads about the way things work, and provides a framework for ingesting new information or forming new attitudes related to an issue. In the advocacy context, narrative is the broad story we're advancing about our issue, constructed and reinforced by frames and messages. By shifting the story from the American Dream that everyone can work hard and achieve a home (and if not, they are lazy or not worthy) to one in which a safe and stable home is a right for everyone (and if not, then something is wrong with our community/society, not the individual), we think people will view the problem and solutions differently.

On the issue of criminal justice, for example, some politicians emphasize the narrative that in order to be safe we need harsh punishment to deter crime — and that includes stripping people of their rights even after incarceration — while others put forth the story that rehabilitation can help keep us safe by approaching those who are incarcerated as people who can be rehabilitated and re-enter society. These two different ways of telling the story about what keeps us safe impacts how one views the criminal justice system, the people in that system, and the solutions to its problems.

DOMINANT NARRATIVES

Dominant narratives, says Dr. Tiffany Manuel of TheCaseMade, are "common explanations, beliefs or ways of thinking that get reinforced through culture (e.g., through the stories we tell and our culture norms) that often make it more difficult for people to see their collective interest in having systems designed to produce equitable outcomes. Because dominant narratives are so normalized through their repetition and authority, they have the illusion of being objective and apolitical, when in fact they are neither."

NARRATIVE CHANGE

Narrative change is a set of strategies for shifting paradigms and discourse over time. The purpose of narrative change is to change dominant narratives and make our ideas and values common sense or mainstream. Meaningful narrative change is not possible without real narrative power behind it. According to Alan Jenkins, co-founder of The Opportunity Agenda, "Narrative change is not about consensus on every policy detail, but rather agreement on the broad values, themes, and directions that the public discourse and public policy should take."

NARRATIVE POWER

Narrative power is the ability to change the norms and rules our society lives by. ReFrame defines narrative power building as "the long-term effort of advancing, establishing, and reifying/defending narratives through a variety of strategies and tactics." Narrative power is built through the practice of strategic communications, further defined by ReFrame as "consistently and persistently saying the right thing, to the right people, at the right time, to mobilize social power and advance your narrative, to accomplish short-term objectives and set up long-term victories."

The goal of this research is to provide advocates with a tested narrative frame and messages that over time, help advance narrative change and build narrative power toward housing solutions in California.

FRAME

"A frame is a guide," according to FrameWorks Institute. "It directs people where to look, but more importantly, helps them interpret what they see. Every message — whether written, spoken, illustrated, or signed — is presented through a frame of some kind." Because all frames reinforce or undermine some narrative, in this paper, we use "frame" and "narrative frame" interchangeably.

The frame is what we're emphasizing in the story we want to tell, and the messages are the words and phrases we place within that frame that will connect with our audiences to move them toward our goal. Messages are nested in frames that prime and reinforce narratives. Conversely, narratives are formed and solidified through frames and messages. Used effectively in concert, they can result in narrative change.

Research Findings

This project included a number of research approaches in iterative phases that culminated in generating, testing, and selecting the California Dream narrative. By drawing on multiple methods and stages of research, our approach has resulted in rich insights into the narrative landscape of housing in California, as well as opportunities to shift that landscape toward housing solutions.

The appendix includes additional details of the research findings, including a deeper dive into the formative research summarized below, as well as methodology, additional data points, and reflections from the "fresh findings" outlined below.

Formative Research (Phase 0–2)

The findings described in this paper build upon several types of vital formative research:

Phase 0: Field Listening
First and foremost, the Public Opinion and Survey Science (POPSS) and Housing Affordability teams sought to root the research in the field we serve. To inform the research design and ensure its utility and applicability for the field, CZI began the project by convening a multidisciplinary group of advisors to bring the perspective of field practitioners to the fore. A formal Steering Committee — composed of seasoned housing advocates from across California — advised the project at every step of the way, and we are so grateful for their wisdom, guidance, and continued partnership. By building on input from advocates as the core foundation of the research, CZI sought to ensure the resulting recommendations were driven by field needs and would yield the tools housing advocates need most to advance their work.

Phase 1: Media Monitoring
We partnered with Protagonist to conduct media landscaping in order to understand the existing public conversation on housing in California — in both social and traditional media. The goal of this phase of research was to better understand and assess the current conversations on housing taking place across California in the media. This landscape analysis gave us vital contextualizing input and a foundational understanding of the narrative circumstances California's housing advocates are operating within.

Phase 2: Foundational Qualitative Research
This phase of research collected qualitative input from everyday Californians across the state to generate hypotheses about the values and attitudes that California voters have toward housing affordability. In this phase of research, we sought to understand the breadth and depth of California voters' underlying values and attitudes toward housing reform — as well as the contradictions they hold. In the subsequent research described below, these hypotheses were then tested in the quantitative mindset segmentation that followed.

Mindset Segmentation (Phase 3)

GOAL OF THIS PHASE OF RESEARCH

Given the goals of this narrative research to identify a unifying narrative frame that can appeal across a wide range of California voters, we sought to capture the distinct and varying views that California voters hold toward housing affordability and housing reform. Rather than viewing the electorate as a monolithic unit or only through traditional differentiators like demography, partisanship, or geography, a values-based mindset segmentation surfaces the unique ways that voters think about housing affordability. The mindset segmentation offers a generalizable and representative picture of how voters in California come to the table on housing affordability.

METHODOLOGY IN BRIEF
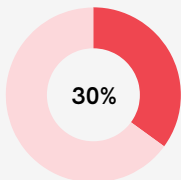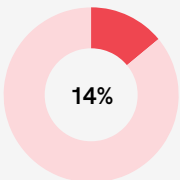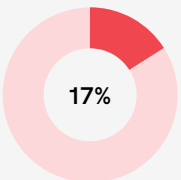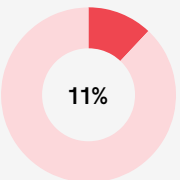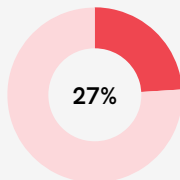
- **Field dates:** November 5–18, 2019

- **Data source:** AmeriSpeak from the National Opinion Research Center at the University of Chicago

- **Target population:** Registered California voters

- **Languages:** English, Spanish

- **Sample size:** n=1,078

- **Analytical notes:** Segments were derived through a non-negative matrix factorization. All reported differences are statistically significant at a p-value of 0.05 or below. POPSS has continued to track segment sizes twice annually since the original segmentation was completed.

KEY TAKEAWAYS

- There are five distinct mindset segments that describe California voters on the issue of housing affordability.

- These mindset segments transcend the traditional differences of demography and political affiliation, reinforcing that housing as an issue is not yet bogged down by partisan tribalism among the electorate; for voters, there's no clear "left" or "right" on many aspects of this issue.

- The mindset segments offer housing advocates a fresh, deeper understanding of their audiences within the California voter population in order to meet voters where they are on the issues.

The following table summarizes the mindsets, which can be explored in greater detail in the appendix on page 26.

Meet the Mindsets

November 2021 proportions | Margin of error +/- 3.84%

Rugged Individualists

30%

"Housing security — and other financial achievements — need to be earned. It's every person for themselves."

Housing is a privilege, not a right.

Not everyone can afford a place to live, and that's not my fault or problem.

American Dreamers

14%

"The American Dream is attainable if you buckle down, work hard, and take care of your community."

Values insular community, although ultimately looks out for themselves.

Expensive housing is a sign of success that we should all strive for.

Pro-Government Pragmatists

17%

"People need to work hard to achieve housing security, but the government should help create a system that provides opportunity for everyone."

Everyone deserves to live somewhere.

However, owning a home is something you must work for.

Dream Disruptors

11%

"We shouldn't rely on legacy ideas and systems to solve modern day problems.

Neighborhoods need to adapt to changing realities.

The market is to blame for the housing crisis."

Equity Enthusiasts

27%

"Everyone should be able to achieve their version of the American Dream; A rising tide lifts all boats!"

Housing is a basic human right.

Individuals born with more opportunities are responsible to ensure everyone has a roof over their head.

When looking at the breakdown of California voters' views on housing issues, an important note for advocates is that — given expected movement in mindsets, turnout likelihood, level of political engagement, and other contextual constraints — movement toward statewide policy solutions will likely require a coalition across mindset segments.

The data also yields useful information on how each of the mindset segments views specific housing reforms. It's worth noting that voters in each mindset segment respond fairly predictably based on the underlying values that define each — which further validates the mindset segmentation as a means of understanding audiences. It's also worth noting that all mindset segments are generally supportive of reforms in the abstract, signaling opportunity across all mindsets.

Housing Reform Outcome by Segment

Legend: % SOMEWHAT SUPPORT / % STRONGLY SUPPORT

Segment	Production		Preservation		Protection	
Equity Enthusiasts	48%	34%	50%	40%	36%	56%
Dream Disruptors	41%	37%	52%	31%	34%	54%
Pro-Government Pragmatists	45%	32%	58%	34%	50%	40%
American Dreamers	54%	13%	57%	15%	53%	25%
Rugged Individualists	44%	15%	58%	9%	47%	9%
All CA Registered Voters*	46%	25%	55%	24%	55%	24%
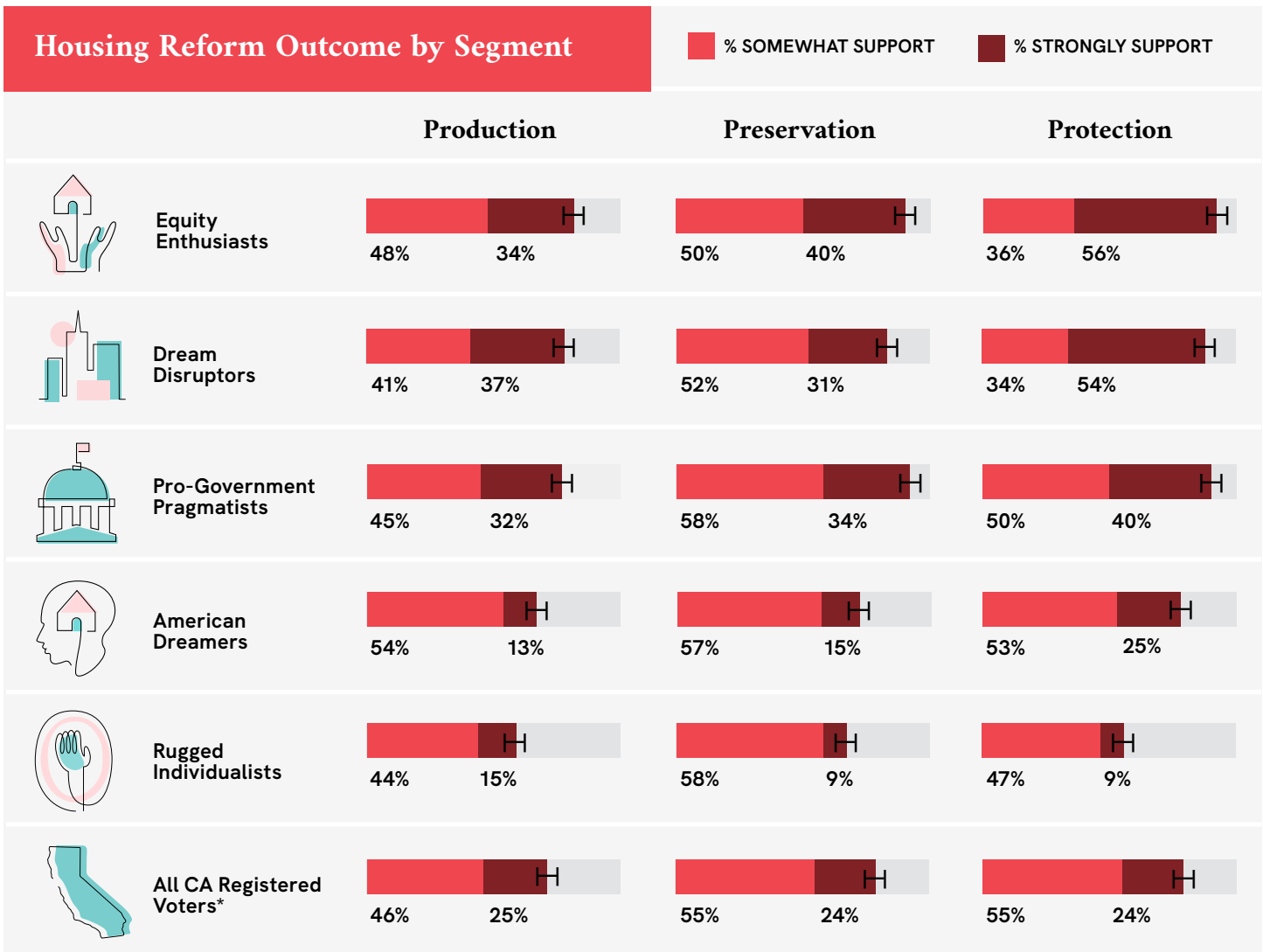
* Represents total population of voters, not a segment.

Frame Generation and Testing (Phase 4–4.5)

GOAL OF THIS PHASE OF RESEARCH

Rooted in the fresh understanding of our audience offered by the mindset segmentation, the goal of this phase was to identify a broad unifying narrative frame to buoy the case for housing reforms across the widest possible audience of California voters by developing and testing a set of six frames.

Methodology in Brief

FOCUS GROUPS

- **Virtual discussion field dates:** June 2–June 5, 2020

- **Group composition:**
  - Two focus groups with each of the five segments for a total of ten focus groups.
  - Groups represented voters from the Bay Area and Southern California.
  - Recruited participants completed a typing tool that classified them into one of the mindset segments.
  - Each group had 8–10 participants for a total of 86 participants.

QUANTITATIVE TESTING

- **Field dates:** January 3–February 8, 2021, with a pause from January 7–27, 2021, to avoid data collection following the insurrection of the U.S. Capitol on January 6. (Responses collected before January 7 and those collected after January 27 were compared to ensure no systematic differences existed.)

- **Data source:** YouGov

- **Target population:** California registered voters

- **Languages:** English, Spanish

- **Sample size:** n=5,734

- **Analytical notes:** All reported differences are statistically significant at a p-value of 0.05 or below

KEY TAKEAWAYS

- From the focus groups, we heard that most California voters do not believe that the standard American Dream of home ownership is possible — or, among some mindset segments, even desirable. One common theme that emerged was, despite the state's difficulties in terms of housing costs, traffic, and political dynamics, nearly all participants felt like California had the ability to solve its problems. Respondents reflected on how innovative, creative, and forward-thinking California is with respect to its economy and setting national trends, and that these qualities could be leveraged to solve the housing affordability crisis. This theme served as the initial genesis of the California Dream narrative frame.

- Along with this *California Dream = Build What Matters to You* frame that emerged from the focus groups, we also tested five other frames in a large-scale survey of California voters that assessed how motivating and compelling voters found the frames, as well as the extent to which each frame was effective at achieving persuasion and engagement goals after being exposed to one of the frames. Full language tested for each frame can be found in the appendix on page 31. Many of the frames performed in predictable ways across the mindset segments, two of the frames — the *California Dream = Build What Matters to You* and *American Dream = Safe & Stable Home* — had the most positive effects across the segments overall with the least amount of backlash.

FRAMES

NEIGHBORHOOD STABILITY

Key Findings
Compared to all other frames, voters were more likely to find the *Neighborhood Stability* frame motivating. However, motivation did not translate to positive outcomes, as voters exposed to this frame were less likely to believe housing should be guaranteed or is a community issue. Voters are also less likely to express support for production or preservation.

Mindset Segments' Reactions
Rugged Individualists are most repelled by the *Neighborhood Stability* frame, which focuses on the importance of ensuring people from all different backgrounds can afford to live side by side during times of crisis.

Exposure to *Racial Equity* and *Neighborhood Stability* weakens American Dreamers' support for 3Ps (the production of more housing, the preservation of existing housing, and the protection of residents from displacement).

Equity Enthusiasts are most enthusiastic about *American Dream = Safe & Stable Home* and *Neighborhood Stability* frames.

AMERICAN DREAM = ACCESS TO SUCCESS

Key Findings
Voters exposed to the *American Dream = Access to Success* frame were less likely to find it inspiring or motivating, and this frame was least likely to yield positive views on housing outcomes.

Mindset Segments' Reactions
Rugged Individualists only respond well to the *American Dream = Access to Success* frame. However, this is the least popular frame among all other segments.

CALIFORNIA DREAM = BUILD WHAT MATTERS TO YOU

Key Findings
California Dream = Build What Matters to You is the most effective frame for increasing propensity to act. In fact, it is the only frame that increases propensity to act on housing issues. Respondents exposed to *California Dream = Build What Matters to You* were most likely to donate money to a nonprofit organization focused on housing and sign a petition related to housing.

Mindset Segments' Reactions
Pro-Government Pragmatists are the most persuadable. They respond well to the widest variety of frames, especially *American Dream = Safe & Stable Home*, *California Dream = Build What Matters to You,* and *Better Together*.

BETTER TOGETHER

Key Findings
Respondents exposed to *Better Together* were most likely to view housing as a privilege that is "completely earned" and "much less likely" to vote for a candidate focused on increasing affordable housing.

Mindset Segments' Reactions
Pro-Government Pragmatists are the only group that responds well to *Better Together*.

AMERICAN DREAM = SAFE, STABLE HOME

Key Findings
American Dream = Safe & Stable Home is the most appealing frame based on self-reported measures (i.e., convincing, inspiring, motivating).

Mindset Segments' Reactions
American Dreamers are most convinced, inspired, and motivated by the *American Dream = Safe & Stable Home* frame. However, this frame also reinforces their belief that housing is "mostly earned."

Pro-Government Pragmatists are the most persuadable. They respond well to the widest variety of frames, especially *American Dream = Safe & Stable Home*, *California Dream = Build What Matters to You*, and *Better Together*.

Equity Enthusiasts are most enthusiastic about *American Dream = Safe & Stable Home* and *Neighborhood Stability* frames.

RACIAL EQUITY

Key Findings
Racial Equity has potential to frame housing as a "community" vs. "individual" responsibility. However, it also produces polarizing results across segments.

Respondents exposed to *Racial Equity* were more likely to view housing as a "community" instead of "individual" responsibility.

Mindset Segments' Reactions
Exposure to *Racial Equity* and *Neighborhood Stability* weakens American Dreamers' support for 3Ps (the production of more housing, the preservation of existing housing, and the protection of residents from displacement).

Dream Disruptors are harder to persuade with narrative frames, and do not find any of the frames to be particularly motivating. Although they already express strong support for the 3Ps, exposure to the *Racial Equity* frame weakens the strength of their support.

Among Equity Enthusiasts, exposure to *Racial Equity* slightly weakens support for 3Ps but increases likelihood of donating.

Frame and Outcome-Specific Message Testing

GOAL OF THIS PHASE OF RESEARCH

In this phase, we sought to further hone in on the most effective narrative frame housing advocates could use to engage, persuade, and motivate the broadest cross section of California voters toward housing solutions. To identify a clearly dominant frame between the two most promising candidates, the *California Dream = Build What Matters to You* and the *American Dream = A Safe and Stable Home* frames, the team developed issue-specific messaging to test against specific outcomes.

METHODOLOGY IN BRIEF

- **Field dates:** May 29–June 17, 2021

- **Data source:** YouGov

- **Target population:** Registered California voters

- **Languages:** English, Spanish

- **Sample size:** n=5,023

- **Analytical notes:** All reported differences are statistically significant at a p-value of 0.05 or below

KEY TAKEAWAYS

- *California Dream = Build What Matters to You* emerged as the frame with the greatest potential to move California voters to support and engage with pro-housing ideas and outcomes.

- *The California Dream = Build What Matters to You* frame was more effective for moving respondents to view housing as a right, to act on housing issues, and to support production of housing when compared to other frames and messages.

High-Level Summary of Outcome-Specific Messages

Legend:
- Frame and message combination had a positive effect on outcome (teal)
- Frame and message combination had a negative effect on outcome (red)

		OUTCOMES				
		Right v. Privilege	Individual v. Collective	Propensity to Act	Support for Production	Likelihood of Voting
CALIFORNIA DREAM FRAME AND MESSAGES	Right v. Privilege	positive				
	Individual v. Collective			positive		
	Propensity to Act		positive (weak)	positive	positive (weak)	
	Support for Production			positive		
AMERICAN DREAM FRAME AND MESSAGES	Right v. Privilege	positive		positive		
	Individual v. Collective					positive
	Propensity to Act	negative		negative		
	Support for Production		positive			negative

The California Dream

FRAME: It's about time we redefine the American Dream, and we Californians are the right ones for the job. We need to reboot our idea of the American Dream to reflect the values of our present-day state. Californians know that when we bring people together from all different walks of life, we're able to spark new ideas, pioneer groundbreaking innovations, and solve big problems the Californian way. That's why we need to ensure we build communities where people from different incomes, beliefs, and backgrounds can live, work, and create together.

The California Dream of an inclusive, hopeful future must be open to people from all kinds of backgrounds and all walks of life. Every Californian has the right to a decent place to live, regardless of race or income, so they can be part of our shared future.

DESIRED OUTCOME: Housing is viewed as a fundamental human right (to be guaranteed) and not a privilege (to be earned).	**DESIRED OUTCOME:** Higher propensity to act (e.g., donate money, write to officials, sign petitions) in support of housing reform.	**DESIRED OUTCOME:** Increase support for producing additional housing in one's community.
MESSAGE: Californians know how important an inclusive, hopeful future is for people from all kinds of backgrounds and all walks of life. These values drive innovation, keep businesses and communities thriving, and bring Californian's unique culture to life. Let's make sure all Californians have the right to a decent place to live, regardless of race or income, so they can be part of our shared future.	**MESSAGE:** Californians know how to dream big, innovate, and lead the way. We know housing is a top priority for our community, and it's up to us to use our voices, our votes, and our dollars to make it a priority for lawmakers. Let's take bold action to solve one of the most urgent problems of our time and make sure everyone has a decent place to live.	**MESSAGE:** Rising housing costs are driving business, workers, and young people out of our communities, and if we wait to take action, the problem will only get worse. Let's expand housing options right here, right now, to protect the good jobs, great schools, diverse communities, and unique opportunities that matter to our families and neighbors.

Our research to date suggests that when advocates can nest their ideas within this frame, they are more likely to be successful in moving California voters toward solutions to our shared housing crisis.

In addition to the aggregate results displayed above, the *California Dream = Build What Matters to You* frame produced favorable results among key demographic groups, while — importantly — doing the least harm among others. This ability to persuade key audience segments without igniting backlash among others is a key reason the California Dream frame rose to the top.

- Women exposed to the *California Dream = Build What Matters to You* frame express more favorable views on housing outcomes.
  - More likely to believe housing is a right (58%, compared to 53% *American Dream = Safe, Stable Home* and 54% control).
  - More likely to believe housing is a collective issue (57%, compared to 50% *American Dream = Safe, Stable Home* and 49% control).
  - More likely to vote for a housing candidate (58%, compared to 53% *American Dream = Safe, Stable Home* and 56% control).

- Voters over 50 years old exposed to the *California Dream = Build What Matters to You* frame express more favorable views on housing outcomes.

  - More likely to believe housing is a right (55–64 years old 50%, compared to 38% *American Dream = Safe, Stable Home* and 44% control; 65+ years old 48%, compared to 40% *American Dream = Safe, Stable Home* and 45% control).

- When it comes to race/ethnicity or education, there were no statistically significant effects based on exposure to different frames.

- Voters between 18–29 years old exposed to the *California Dream = Build What Matters to You* frame express mixed results.

  - Younger voters exposed to the *California Dream = Build What Matters to You* frame are more likely to believe housing is a community issue (69%, compared to 55% *American Dream = Safe, Stable Home* and 54% control).

  - However they are also more likely to believe housing is a privilege (44%, compared to 39% *American Dream = Safe, Stable Home* and 27% control).

Mindsets' Reactions to Frames

A key motivation for the mindset segmentation research was to identify a frame that advocates could use to unify voters across values, and move them toward pro-housing solutions. The data below further signals the success of the *California Dream = Build What Matters to You* frame in doing so.

- Among the more movable segments, those exposed to the *California Dream = Build What Matters to You* frame express more favorable views on housing outcomes.

  - American Dreamers exposed to the *California Dream = Build What Matters to You* frame are more likely to believe housing is a community issue (52%, compared to 43% *American Dream = Safe, Stable Home* & 37% control)

  - Dream Disruptors exposed to the *California Dream = Build What Matters to You* are more likely to vote for a housing candidate (78%, compared to 66% *American Dream = Safe, Stable Home*).

  - Pro-Government Pragmatists exposed to *California Dream = Build What Matters to You* are more likely to vote for a housing candidate (72%, compared to 65% *American Dream = Safe, Stable Home* and 62% control).

- Rugged Individualists remain predictable and unphased by narrative frames. For example, they exhibit no significant difference between *California Dream = Build What Matters to You* and *American Dream = Safe, Stable Home* in their belief that housing is a fundamental human right (9% *California Dream = Build What Matters to You*, compared to 10% *American Dream = Safe, Stable Home* and 12% control).

What's Next

We plan to engage in further study to see how this narrative performs in practice. Additional research, networking, and capacity building efforts in the works include:

Further Research

- **Regional Pilot Testing:** Two key regional partners from the Steering Committee — Leadership Counsel for Justice and Accountability and United Way of Greater LA — will put these narrative recommendations into practice for regional and issue-specific message testing. These pilots will help us further understand the conditions under which this narrative performs well, and provide a roadmap for how partners can try this research on for size in their own work.

- **Statewide Randomized Controlled Trial:** Simultaneously, working with Housing California, a key statewide partner from the Steering Committee, we'll conduct a statewide, randomized controlled study to evaluate the effectiveness of the narrative frame in the field and at scale. This randomized controlled trial will involve fielding a statewide creative campaign themed around the California Dream to roughly a million voters across the state.

  Both the pilot testing and the randomized controlled trial will provide a roadmap and further information for advocates on how the California Dream narrative frame can be used to achieve their goals.

- **Racial Equity Message Testing:** Additionally, we'll link the California Dream frame with messages that specifically center and address racial equity to see how voters respond. Hopefully this will yield additional guidance for advocates on how to weave an analysis of race into their communications toward housing solutions while using the California Dream narrative.

- **Regional Segmentation:** In 2022, we expect to design and execute additional values-based segmentations of California voters that are specific to different regions of the state. We heard loud and clear from advocates — and know from prior research — that values and attitudes vary significantly from region to region, and we hope these additional segmentations will be of use to advocates working on region-specific campaigns and solutions.

- **Research to Identify What Makes the California Dream Frame So Effective:** Based on the research we've done to date, we cannot say empirically why the California Dream frame is effective across a diverse set of audiences. In future research, we plan to test different elements of the frame in order to pinpoint its success, thereby making it easier for advocates to use different pieces of the narrative that work for their purposes and goals in different contexts.

Toolkit for Advocates
The findings and recommendations from this research will be compiled into a practical suite of tools on a website that housing advocates can use and remix in their work. The site will be an accessible resource that organizations across the state can rely on for easy-to-use messaging materials to support their day-to-day work.

Housing Narrative Researcher Convening
CZI's Movement Capacity Building team and advocacy partners will gather researchers from across the country to develop a shared understanding of the larger housing narrative landscape, distill key research insights for advocates, and identify opportunities to collaborate and strengthen our collective findings.

Funder Coordination Efforts
CZI's Movement Capacity Building Team and advocacy partners will convene other funders to offer some needed clarity, rigor, and coordination about the resources necessary to effectively shift the narrative for housing over the long term. We hope to secure additional funders to make the needed investments to scale this narrative power and infrastructure building work statewide in 2022 and beyond.

Investing in Narrative for the Long Term
Informed by our research, CZI is excited to invest in the leadership, skills, and infrastructure needed to build and implement long-term narrative power. This will include supporting housing advocates working to experiment with and implement narrative research designed to build public and political support for housing, as well as supporting campaigns and strategies to build and shift new narratives on housing.

Using This Research

This narrative research is designed to be used by California housing advocates across the state. We hope this research adds evidence-based depth and breadth that builds on existing expertise from the field of housing advocates and results in strategies and tactics that can be used to shift existing narratives — and establish new ones that resonate with the individual needs and values of the communities they serve. The ideas, frames, narratives, and messages surfaced in this research can be applied by advocates in numerous ways:

- Pair the tested frames and messages with calls to action that drive your organization's specific goals.

- Use the segmentation results to develop a deeper understanding of your organization's audiences and/or your community's attitudes and beliefs about housing.

- Use the language verbatim in public statements, emails, speeches, social media posts, op-eds, and more.

- Tailor the language, adapting it in ways that will work best for your constituency and community.

Please use and apply these ideas freely! We view this framework as a tool for advocates to adapt and experiment with, tailoring it to your organization and your specific issues, your geography, your context, and your community. We hope that you will try it out in your work and find that it produces results. Tinker with it, stretch it. We look forward to further opportunities for collaboration with other researchers who are also exploring how to advance narrative change efforts. We know that shifting long-entrenched narratives is key for the policy changes necessary to make sure that all Californians have a safe and stable home.

Appendix to
The California Dream

A New Narrative to Engage Californians on Housing Affordability

Appendix to
The California Dream:
A New Narrative to
Engage Californians on
Housing Affordability

This appendix includes additional details and reflections on each phase of this research project.

Table of Contents

Summary of Findings

Phase 0: Core Foundation of Field Input

GOAL

To inform the research design and ensure applicability for the field, the Chan Zuckerberg Initiative's Public Opinion and Survey Science (POPSS) research team began the project by convening a multidisciplinary group of advisors to bring the perspective of field practitioners to the fore. By building on input from advocates as the core foundation of the voter narrative study, CZI sought to ensure the research was driven by the needs of the field in order to give advocates the tools they need most to advance their work.

METHODOLOGY

Input from the field was gathered through one-on-one meetings and interviews and via a series of convenings to collect input on the research design.

TIMING

Early 2019 and ongoing through the pilot testing phase.

Because the research effort was sparked by the clear call from advocates for data-driven narrative tools, CZI wanted to ensure that the research agenda was informed by advocates themselves. We invited advocates to participate at two levels:

- A broad, informal group of stakeholders was engaged in April 2019 to inform our research scope and design. This network of advisors included more than 25 organizations and leaders within the housing movement, all of whom generously lent their ideas and expertise to inform this voter narrative study. The full list of advisors is available in the acknowledgments section.

- From this network, a smaller and more formal six-member Steering Committee was convened in June 2019 to inform research design and to continue to provide deep-dive reflections and reactions to the initial findings in the early stages of research. These subject-matter experts — many of whom are leading-edge practitioners in housing advocacy across California — offered strategic insight and recommendations. Initially planned for a six-month consultation, the Steering Committee continued to offer guidance and insight to inform the project through February 2021, when researchers honed in on a core narrative. Even after the formal sunset of the Steering Committee, three core members are continuing in active partnership with the POPSS

research team, in fall 2021, to host pilot tests of the initial narrative recommendations. These pilot tests will evaluate the effectiveness of the proposed narrative in practice, within the context of active advocacy efforts. The full list of Steering Committee members is available in the acknowledgments section.

The Steering Committee was guided by Dr. Tiffany Manuel, as senior strategic advisor on the project. "Dr. T" is a nationwide expert, working at the nexus of housing narrative research and capacity building for advocates. Connecting housing research and putting it into practice in the field, she regularly guides advocates to shift and unseat dominant narratives, replacing them instead with narratives that advance housing solutions that work for everyone. Her leadership has been invaluable, connecting CZI's research to the existing library of research on housing narratives, to ensure that together as a field we're expanding our shared knowledge.

The feedback of the advisory network and the steering committee was critical to ensure these narrative research efforts continue to be informed by — and responsive to — the needs of the field. Over the course of 2020, members of both groups were also invited to participate in a series of Learning Labs, joining a broader network of some 200 of their colleagues from a wide range of California housing advocacy organizations. wand engagement efforts. Through a mix of presentations, advocates to learn about and digest the early research findings and reflect on how their narrative shift efforts

might be shaped by the early findings within their own communities and constituencies. CZI's POPSS and Housing Affordability teams are deeply grateful for the advocates who lent their perspectives to shape this effort, and we are hopeful that the resulting narrative will be actionable and effective in helping them advance their important efforts toward affordable, safe, and stable homes for all Californians.

Phase 1: Media Monitoring

GOAL

With guiding input from the steering committee, we partnered with Protagonist to conduct media landscaping in order to better understand the public conversation on housing in California. The goal of this phase of research was to assess the current conversations on housing taking place across California in the media (traditional and social).

METHODOLOGY

Content was reviewed from national, local, and regional media (such as The Atlantic, LA Times, Mercury News, etc.), as well as blogs (Curbed LA, Bold Italic, etc.), and Spanish-language media (La Opinion, El Tecolote, etc.) to determine where and how frequently narratives appeared. The narrative landscape analysis also included first person expressions from Twitter and Reddit forums specific to housing in key California regions.

TIMING

January–June 2019. These results are a snapshot in time, and we acknowledge that narratives around housing access and affordability have become more urgent since the beginning of the COVID-19 pandemic.

Media monitoring findings revealed numerous key insights, including ten core narratives shaping California's housing debates, and how they reflect a spectrum of stances toward housing production and the role of government in addressing California's housing crisis. The analysis offers insight into how these narratives play out differently in specific communities across California.

For example, the most common housing-related topics varied across the state and by dissemination platform, as did potential solutions and how communities feel about them.

Phase 2: Foundational Qualitative Research

GOAL

This phase of research collected qualitative input to generate hypotheses about the values and attitudes that California voters have toward housing affordability. In this phase of research, we sought to understand the breadth and depth of California voters' underlying values and attitudes toward housing reform — as well as the contradictions they likely hold. While this provided deep and nuanced insights, they are not generalizable to the population. As such, these hypotheses were then tested in the quantitative mindset segmentation that followed.

METHODOLOGY

- Four focus groups with a total of 33 participants

- Online diaries with 25 participants

- In-depth interviews in the homes of 12 participants in the Bay Area, Los Angeles Area, and San Joaquin Valley.

TIMING

April–May 2019

The qualitative research was characterized by deep listening to a sample of Californians to understand their ideas, attitudes, deep values, and underlying beliefs about our housing crisis and its root causes in a personal, nuanced way.

From listening deeply to a cross-section of California voters, POPSS noticed some common themes:

1. People hold multiple, overlapping, and often conflicting narratives about housing issues.

2. Everyone agrees rent and prices are too high, but they don't necessarily connect this with a housing shortage.

3. People blame developers, landlords, and the government for housing costs.

A key outcome of this phase was to identify the breadth of views that exist among Californians as an input into the quantitative mindset segmentation that followed it. We heard that Californians have diverging, sometimes conflicting, views on:

- Whether or not all Californians have a right to affordable housing.

- The role government should play in the housing market.

- The costs and benefits of addressing the affordable housing shortage.

- The role of housing in exacerbating inequality.

- Openness to living in communities that are both racially and economically diverse.

- The pros and cons of neighborhood change.

- The relationship between individual and collective interests.

Attachment: CZI-The-California-Dream-Housing-White-Paper (Presentation on Chan Zuckerberg Initiative's Housing Narrative Research)

Packet Pg. 91

Additional themes emerged that highlight the tensions and challenges that housing advocates regularly confront:

- **Low-income housing itself is not necessarily named as a threat to the neighborhood — but some voters associate this type of housing with "behaviors" they do express concerns about.** Some California voters hold deep-seated fears that housing opponents can easily tap into. Most renters and owners we heard from expressed that they are wary of affordable housing solutions in their neighborhood, citing worries that it will result in crime, noise, litter, illegal dumping, and a general lack of property upkeep. Owners expressed this more as a quality of life issue than a property value issue — but property value concerns seem to lie just under the surface.

- **Voters' fears are linked to mental images of potentially threatening people and places.** Voters readily identified specific people and places they perceive to be threatening. Phrases used to describe these mental images included "gangs," "homeless people," "riff raff," "bad neighborhoods," and "underpasses."

- **Some see benefits in gentrification, others see threats.** Many voters perceive gentrification as welcome improvements in their neighborhood: a store like Starbucks or Target nearby, improved parks and transportation, neighborhood watch groups, and families and children enjoying safe sidewalks and streets. For market-rate renters, these can be exciting even as they raise flags about their own long-term stability to afford housing as the neighborhood changes around them. For owners and price-stabilized renters, the sense of threat or loss comes later when the neighborhood becomes wealthier and often whiter, and the neighborhood tips toward a new majority. At that stage, longstanding neighbors of various income levels and races are pushed out, small businesses struggle, and groceries and other day-to-day items become too expensive.

- **It's hard for voters to imagine stable, thriving mixed-income neighborhoods.** Most voters we met are accustomed to thinking of multi-income/multi-class neighborhoods as unstable and transitioning — either gentrifying or in decline. This is reinforced by a tendency to think of their towns and communities in terms of geographies of class. These mental geographies inform their ideas of where they'd like to live and where they can afford to live. This also informs ideas about locations that they consider unstable borderlands where different classes have existed side by side but may be starting to collide.

- **When it comes to housing, class is the least comfortable dimension of diversity**. Nearly all voters we met broadly embraced diversity as a current or aspirational feature of their neighborhood. Many voters, both progressive and conservative, speak proudly of neighbors who are dissimilar from them in age, sexual orientation, race, and ethnicity. But they are wary of neighbors who are significantly different from them in class. Discomfort living among different economic classes was expressed across all income levels; low-income and high-income people alike often express distrust — or even distaste — for their neighbors with differing economic circumstances.
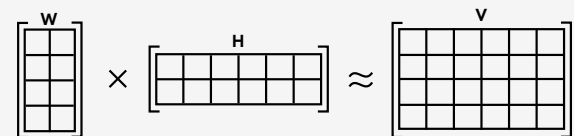
Phase 3: Mindset Segmentation

GOAL

Given the goals of this narrative research to identify a unifying narrative frame that can appeal to all types of California voters, in this phase, the research team sought to capture the distinct and varying views that California voters hold toward housing affordability and housing reform. Rather than viewing the electorate as a monolithic unit or only through traditional differentiators like demography or geography, a mindset segmentation surfaces the unique ways that voters think about housing, grounded in the values that inform their worldview. The mindset segmentation offers generalizable and representative data and analysis on what voters across the state actually think and feel about housing.

METHODOLOGY

This phase of research generated values-based quantitative audience segmentation using survey data resulting in voter personas reflective of the statewide population. The research team first developed mindset segmentation questions informed by the formative research and expert input. The questions were designed to sort voters according to their own deeply held values toward housing and their communities. The research team administered the survey using AmeriSpeak. The research team then ran a cluster analysis that takes as input responses to 88 values statements and identifies the unique clusters of mindset segments that exist within the data. Using responses to the values statements to understand preferences toward housing reform, POPSS ultimately developed the rich personas below, with the distinctions between the mindset segments rooted entirely in voters' values.

- **Data source:** AmeriSpeak, an online, probability-based panel developed by the National Opinion Research Center at the University of Chicago

- **Sample size:** n=1,078

- **Field dates:** November 5 -18, 2019

- **Sampling methodology:** Survey fielded to self-identifying registered voters in California; Margin of Error: ±3.94% for full sample.

- **Weighting benchmarks:** Post-stratification weighting was performed to account for response bias and demographic imbalance. Weighting benchmarks included county, gender, age, income, education, and race/ethnicity and were based on proportions from the 2019 Current Population Survey.

- **Analytical process:**
  - Using the response data from 88 Likert scale statements, ran a cluster analysis using non-negative matrix factorization (NMF). Non-negative matrix factorization is a method used to represent the model matrix (respondents X variables) with 2 new matrices, where one segments respondents and the second groups variables into clusters of highly correlated features. This method is often applied to high-dimensional datasets where the number of features exceeds 20. With this approach, we were able to cluster segment respondents according to their mindset segmentation variables and specify the variables that define each cluster. The known challenge within this method is the proper specification of the number of segments used in the factorization, which is supported by statistical validation methods designed for clustering problems

- The best performing solution in both statistical (as determined by model diagnostic scores such as Silhouette and Dispersion metrics) and practical terms was the 5-segment option.

  Note that anywhere comparative values are presented, differences are significant at a p=value of 0.05 or below.

  Our analysis identified an option with 5 segments (of balanced sizes)

Clusters (k)	5	Dispersion	0.66
Methodology	NMF	Largest segment %	28.2%
Silhouette score	0.39	Smallest segment %	17.2%

PHASE 3

The mindset segments identified in this phase of research are outlined in greater detail below and current as of November 2021.

RUGGED INDIVIDUALISTS

Comprising 30% of California voters, Rugged Individualists are voters who believe that having a home is something that needs to be earned. It's not something that people should expect to be provided for them. Focused on the individual, rather than the collective, Rugged Individualists expect people to either pay more as housing costs increase or to move to a cheaper area.

Themes that emerged as defining beliefs and values of Rugged Individualists include:

- Housing is a privilege
- Too expensive? Pay more or move to an affordable area
- Opposes government intervention
- Home ownership is an avenue for wealth generation
- Does not value diversity
- Prefers living in close-knit community with similar people
- Does not feel responsible to think of affordable housing for others
- Homelessness is a result of bad personal choices
- Individualism over collectivism

It's also worth noting where Rugged Individualists' demographics were statistically different from overall California voters, as they were more likely to be:

- Older than 60 years old (43%)
- White, non-Hispanic (81%)
- Republican (45%)
- Independent (24%)
- Homeowners (76%)

AMERICAN DREAMERS

American Dreamers comprise 14% of California voters. Similar to Rugged Individualists, American Dreamers believe that housing must be earned. American Dreamers are more likely to be renters and lower income. American Dreamers are community-oriented as far as their immediate insular community goes, but ultimately focused on individual needs and outcomes, likely out of necessity.

Themes that emerged as defining beliefs and values of American Dreamers include:

- Housing should be earned
- High housing cost is a sign of success
- Values and trusts insular community
- Ultimately looks out for themselves
- Feels less safe in communities with lots of different types of people
- Prefers to live among people with similar race/ethnicity and economic class
- It's a shame when neighborhoods evolve over time
- Does not really understand the government's role in creating affordable housing
- Open to government intervention if it helps them

It's also worth noting where American Dreamers' demographics were statistically different from overall California voters, as they were more likely to be:

- Female (60%)
- Asian (28%)
- Undecided political views (8%)

PHASE 3

Attachment: CZI-The-California-Dream-Housing-White-Paper (Presentation on Chan Zuckerberg Initiative's Housing Narrative Research)

PRO-GOVERNMENT PRAGMATISTS

Comprising 17% of California voters, Pro-Government Pragmatists believe that everyone should have a decent place to live, but they know that right now not everyone can. Pro-Government Pragmatists think the government should intervene to provide housing opportunities for more people and that owning a home is a wealth-generating opportunity.

Themes that emerged as defining beliefs and values of Pro-Government Pragmatists include:

- Housing is both a right and a privilege
- Everyone should have a decent place to live, but not everyone can right now
- Government should intervene to provide affordable and safe housing for everyone
- Owning a home is an opportunity for wealth generation
- Values close-knit community and diversity
- Would be proud to live in a community with affordable housing
- Would choose a neighborhood further from jobs, as long as housing prices are within budget
- Prioritizes collectivism over individualism

It's also worth noting where Pro-Government Pragmatists' demographics were statistically different from overall California voters, as they were more likely to be:

- 45–59 years old (34%)
- Black, non-Hispanic (10%)
- Undecided political view (6%)
- No high school diploma (26%)
- High school graduate or equivalent (30%)

DREAM DISRUPTORS

Reflecting 11% of California voters, Dream Disruptors are supportive of most housing reforms but unattached to and skeptical of the current housing system and market. Unconcerned about home ownership or property value, Dream Disruptors envision a future where everyone has a home, but no one has more home than they need. They're pro-change, pro-diversity, and pro-innovation.

Themes that emerged as defining beliefs and values of Dream Disruptors include:

- Supportive of housing reforms, but skeptical of current system
- Unconcerned about home ownership or property values
- Envisions a future where everyone has a home, but no one has more than they need
- A community's success has nothing to do with high housing costs
- Americans should be able to achieve financial security without owning a home
- Does not express strong community ties
- Most open to change in neighborhoods
- Healthy neighborhoods need to adapt to changing realities

It's also worth noting where Dream Disruptors' demographics were statistically different from overall California voters, as they were more likely to be:

- American Indian / Alaskan Native (7%)
- Asian (25%)
- Democrat (74%)
- 18–29 years old (36%)
- Have some form of college education (47%)

EQUITY ENTHUSIASTS

Equity Enthusiasts make up 27% of California voters. Similar to Dream Disruptors, Equity Enthusiasts believe that everyone has a right to a home, and are highly supportive of every housing reform tested — the most supportive of all 5 segments. Unlike Dream Disruptors, Equity Enthusiasts see value in home ownership, and want that opportunity for everyone. Collectivist to their core, Equity Enthusiasts believe that individuals born with more opportunities in life have a responsibility to ensure everyone has a roof over their head. Equity Enthusiasts are pro-government intervention, pro-community, and against the free market determining who can live where.

Themes that emerged as defining beliefs and values of Equity Enthusiasts include:

- Housing is a basic human right
- Highly supportive of housing reforms
- Sees value in home ownership, and wants that opportunity for everyone
- Collectivist to their core
- Individuals born with more opportunities have a responsibility to ensure everyone has access to housing
- Providing decent housing is the key to addressing homelessness
- Thinks of others before themselves
- Most willing to make personal sacrifices and use their own resources to help strangers

It's also worth noting where Equity Enthusiasts' demographics were statistically different from overall California voters, as they were more likely to be:

- 18–44 years old (54%)
- Mixed race (7%)
- Democrat (73%)
- Bachelor's degree or above (51%)
- Renter (40%)

PHASE 3

Attachment: CZI-The-California-Dream-Housing-White-Paper (Presentation on Chan Zuckerberg Initiative's Housing Narrative Research)

The Mindsets Segments

Unpacking Mindsets

	Rugged Individualists	American Dreamers	Pro-Government Pragmatists	Dream Disruptors	Equity Enthusiasts
COLLECTIVE	●○○○○	●●●○○	●●●●○	●●○○○	●●●●●
DIVERSITY	●○○○○	●○○○○	●●●●○	●●●●●	●●●●●
BASIC RIGHT	●○○○○	●●○○○	●●●○○	●●●●●	●●●●●
OPEN TO CHANGE	●●○○○	●○○○○	●●●○○	●●●●●	●●●●○
HOUSING REFORM	●○○○○	●●○○○	●●●●○	●●●●●	●●●●●

Another key finding of note is the very high salience of housing issues among California voters: across all mindset segments, housing and homelessness were consistently ranked among voters' top concerns.

This is good news for housing advocates, who don't need to raise awareness about the problem or stoke the call for solutions — California voters already see these issues as urgent and important.

## Personal Concerns Ranked Across Segments

NUMBERS FROM DECEMBER 2019
* STATISTICALLY MORE IMPORTANT THAN ITEM BELOW

Rugged Individualists

1. Homelessness *
2. **Housing Affordability**
3. Nonviolent Crime
4. Drugs *
5. Violent Crime
6. Healthcare
7. Poverty *
8. Unemployment
9. Undocumented Immigrants
10. Traffic *
11. Transportation
12. Public Education *
13. Pollution
14. Access to Healthy Food
15. Climate Change
16. Racial Tension *
17. Access to Recreational Areas

American Dreamers

1. **Housing Affordability**
2. Homelessness
3. Drugs *
4. Violent Crime
5. Healthcare
6. Poverty
7. Unemployment
8. Nonviolent Crime
9. Traffic
10. Public Education *
11. Transportation
12. Pollution
13. Access to Healthy Food
14. Climate Change
15. Undocumented Immigrants *
16. Access to Recreational Areas
17. Racial Tension

Pro-Government Pragmatists

1. Homelessness
2. **Housing Affordability** *
3. Poverty
4. Healthcare
5. Violent Crime *
6. Drugs
7. Unemployment *
8. Nonviolent Crime
9. Climate Change *
10. Public Education
11. Access to Healthy Food
12. Transportation *
13. Pollution
14. Traffic
15. Racial Tension
16. Undocumented Immigrants *
17. Access to Recreational Areas

Dream Disruptors

1. **Housing Affordability** *
2. Healthcare
3. Poverty *
4. Homelessness
5. Unemployment *
6. Climate Change
7. Violent Crime
8. Nonviolent Crime
9. Drugs
10. Access to Healthy Food
11. Public Education
12. Transportation
13. Pollution
14. Racial Tension
15. Traffic *
16. Access to Recreational Areas
17. Undocumented Immigrants

Equity Enthusiasts

1. **Housing Affordability** *
2. Poverty *
3. Homelessness
4. Healthcare
5. Climate Change *
6. Unemployment *
7. Violent Crime
8. Drugs
9. Nonviolent Crime
10. Access to Healthy Food
11. Traffic
12. Transportation
13. Racial Tension
14. Pollution
15. Public Education *
16. Access to Recreational Areas
17. Undocumented Immigrants

What the mindset segmentation data further indicates is that while California voters can agree there's a serious problem, they are not aligned on the source of the problem, or the solutions to address it.

Individual or Systemic Problem? Market or Government Solutions?

SYSTEMIC PROBLEM

Who's problem?

MARKET ← Who's solution? → GOVERNMENT

INDIVIDUAL PROBLEM

Packet Pg. 97
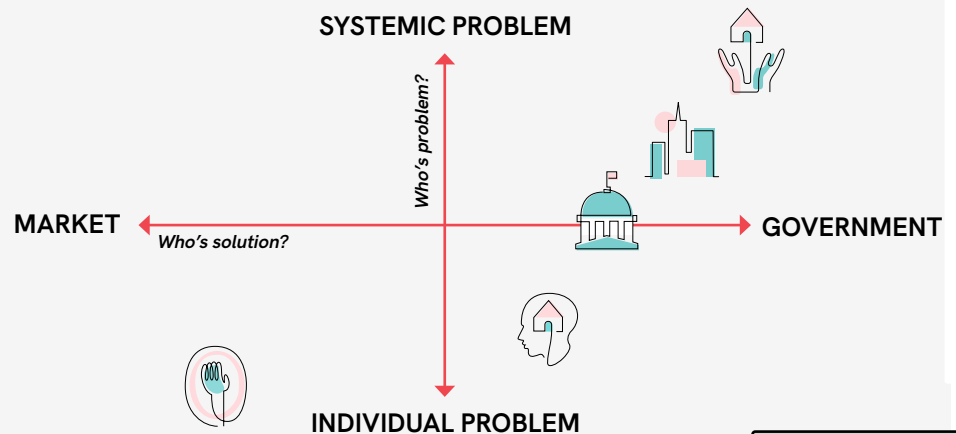
Phase 4: Frame Generation and Testing

GOAL

Rooted in the fresh understanding of our audience offered by the mindset segmentation, the goal of this phase was to identify a broad unifying narrative to buoy the case for housing reforms across the widest possible audience of California voters by testing a set of six frames.

METHODOLOGY

This phase of research included two sub-phases: 1) focus groups to generate narrative frames that speak to the values that surfaced from the mindset segmentation and quantitatively test the appeal and persuasive power of each frame; and 2) survey experiments to test the extent to which each narrative frame can move California voters overall and by Mindset Segment on key outcomes such as viewing housing as a human right and increasing their propensity to act in support of housing reform.

Focus Groups:

- Two 90-minute online focus groups with each of the five segments for a total of ten groups.

- One group for each segment was completed among voters in Southern California and one among voters in the San Francisco Bay Area.

- Recruited participants completed a typing tool that classified them into one of the mindset segments.

- Each group had 8–10 participants for a total of 86 participants.

- Virtual focus group dates: June 2–June 5, 2020.

QUANTITATIVE SURVEY

For the survey experiment, the sample was randomized into seven groups of roughly 800 people, and each group was exposed to one of the six frames below (with the seventh group as the control). Voters were first asked about their baseline attitudes toward housing, including issue salience, perception of housing as a right or privilege, perception of housing as an individual or collective issue, as well as support/opposition for the 3Ps (the production of more housing, the preservation of existing housing, and the protection of residents from displacement). After exposure to the frames, participants were again asked attitudinal questions, with statistically significant differences in attitudes and motivation attributed to their exposure to the frames.

- **Data source:** YouGov, an online survey panel with a sample frame developed by targeted quota recruitment followed by a random selection of units within each quota cell.

- **Target population:** California registered voters

- **Sample size:** n=5,734

- **Field dates:** January 3–February 8, 2021, with a pause from January 7–27, 2021, to data collection following the insurrection of the U.S. Capitol on January 6. (Responses collected before January 7 and those collected after January 27 were compared to ensure no systematic differences existed.)

- **Languages:** English, Spanish

- **Weighting benchmarks:** Gender, age, education, and race/ethnicity

- **Analytical notes (significance):** All comparative statistics are statistically significant at a p-value of 0.05 or below

The table below outlines the six frames that were tested in this phase:

FRAME	SUMMARY	LANGUAGE
Neighborhood Stability	Making sure every Californian has access to a safe and stable home isn't just a nice-to-have, it's key to our collective resilience.	**Making sure every Californian has access to a safe and stable home isn't just a nice-to-have. It's the key to ensuring that our towns and cities can maintain resilience during hard times.** As we're faced with more social and environmental challenges, the more we see how our well-being is directly tied to our neighbors' stability and well-being. That's why it's our responsibility to make sure people from all different backgrounds and skill sets — from doctors, nurses, and firefighters to school teachers, bus drivers, and couriers — can afford to live side by side with one another and support each other during uncertain times.
American Dream = Access to Success	Focus on empowerment and the opportunity to provide people with access to success.	The crux of the American Dream is about making sure everyone can work hard and build the life they want for themselves. It's our responsibility as Californians to make sure every Californian has equal opportunity to succeed and reach their full potential. **Still, it's also up to each one of us to make good choices about our personal housing situation if we want to improve it.**
California Dream = Build What Matters To You	We care less about everyone owning a traditional home and we care more about making sure everyone can afford to live in communities rich with diversity.	**It's about time we redefine the American Dream, and we Californians are the right ones for the job.** We need to reboot our idea of the American Dream to reflect the values of our present-day state. Californians know that when we bring people together from all different walks of life, we're able to spark new ideas, pioneer groundbreaking innovations, and solve big problems the Californian way. That's why we need to ensure we build communities where people from different incomes, beliefs, and backgrounds can live, work, and create the California Dream together.
American Dream = Safe, Stable Home	Every Californian deserves a chance at achieving the American Dream, and that starts with having access to a safe and stable home.	Being able to work toward the American Dream starts with having access to a safe and stable home. **Without the necessary security that comes with having somewhere secure to call home and build a life from, it's nearly impossible to plan for your future,** focus on school or work, start a business, or contribute to the community you live in. When we ensure people from all walks of life can afford a place to live, we can make sure that more of us can make our American Dream a reality and contribute to our society's collective well-being.
Better Together	Connect individuals with collective benefits. The sum is greater than its parts.	**Here in California, we believe the sum is more significant than its parts.** When we build neighborhoods with a mix of homes for people of all income levels, our communities become richer with diversity and more connected through shared experiences. That's why it's important to ensure housing in cities and towns across our state meet a wide range of people's needs.
Racial Equity	Emphasize the current opportunity to rectify historically discriminatory practices in housing policy to close the racial wealth gap and diversify the mix of housing available to all families.	More than any other place in the nation, California has the best opportunity to create a racially just housing system. Historically discriminatory practices, such as redlining, restricted the growth of many of our towns and cities by keeping millions of Black and brown families from owning their homes. **Today, we have the opportunity to finally make things right. By focusing on solutions that directly address these injustices, we can close the racial wealth gap and diversify the mix of housing available to all families.** Such efforts will ultimately strengthen our state's economy by ensuring that every Californian can share in the prosperity of our growing neighborhoods.

PHASE 4

Attachment: CZI-The-California-Dream-Housing-White-Paper (Presentation on Chan Zuckerberg Initiative's Housing Narrative Research)

Phase 4.5: Frame and Outcome-Specific Message Testing

GOAL

In this phase, we sought to further hone in on the most effective frame housing advocates could use to engage, persuade, and motivate the broadest cross section of California voters toward housing solutions. To identify a clearly dominant frame between the two most promising candidates, the *California Dream = Build What Matters to You* and the *American Dream = A Safe and Stable Home* frames, the team developed issue-specific messaging to test against specific outcomes. This phase sought to test if the frames are effective at a high level and also when deployed in service of specific outcomes.

METHODOLOGY

During this phase, researchers crafted outcome-specific messages for each of the narrative frames, in a way that stayed true to the tenor of the frame while being more direct in the outcome of interest. Respondents were randomly assigned to be exposed to one of eight frame and outcome pairings, a competing narrative frame, or a pure control, and then posed a series of outcome questions. After exposure to a frame any statistically significant differences in an outcome variable is attributed to exposure to the frame.

- **Data source:** YouGov, an online survey panel with a sample frame developed by targeted quota recruitment followed by a random selection of units within each quota cell

- **Target population:** Registered California voters

- **Sample size:** n=5,023

- **Field dates**: May 29–June 17, 2021

- **Languages:** English, Spanish

- **Weighting benchmarks:** Gender, age, education, and race/ethnicity

- **Analytical notes (significance):** All comparative statistics are statistically significant at a p-value of 0.05 or below

In addition to identifying the winning frame, this phase of research also found that the *California Dream = Build What Matters to You* frame can be even more effective when paired with outcome-specific messages. The table on the next page outlines the outcomes the researchers hoped to achieve, the messages that audiences were exposed to, and the results.

OUTCOME	MESSAGE	STATISTICALLY SIGNIFICANT RESULTS
Housing is viewed as a right (rather than a privilege)	**Californians know how important an inclusive, hopeful future is for people from all kinds of backgrounds and all walks of life.** These values drive innovation, keep businesses and communities thriving, and bring California's unique culture to life. Let's make sure all Californians have the right to a decent place to live, regardless of race or income, so they can be a part of our shared future.	California voters exposed to this message were significantly more likely to believe that housing should be "completely guaranteed" (27% vs 21% of California voters overall).
Higher propensity to act (e.g., donate money, write to officials, sign petitions) in support of housing reform	**Californians know how to dream big, innovate, and lead the way.** We know housing is a top priority for our community, and it's up to us to use our voices, our votes, and our dollars to make it a priority for lawmakers. Let's take bold action to solve one of the most urgent problems of our time and make sure everyone has a decent place to live.	24% of California voters exposed to this message indicated they were more likely to share housing-related messages on social media (vs 21% overall).
Increase support for producing additional housing in one's community	**Rising housing costs are driving businesses, workers, and young people out of our communities, and if we wait to take action, the problem will only get worse.** Let's expand housing options right here, right now, to protect the good jobs, great schools, diverse communities, and unique opportunities that matter to our families and neighbors.	This message was somewhat effective, as California voters exposed to this message were more likely to "somewhat support" production in their community (35%, compared to 31% overall).

Why Not the American Dream?

It's also worth noting the outcomes related to the other frame researchers were testing at this stage, *American Dream = Safe, Stable Home*.

The *American Dream = Safe, Stable Home* message intended to increase propensity to act was damaging. California voters exposed to the message were more likely to say "I do not plan on doing any of the above actions" (57%, compared to 52%).

- Researchers saw similar damages toward the likelihood of voting for housing candidates, with a significant decrease in "more likely" to vote for housing candidates (21%, compared to 26%).

- This message was further damaging on the "housing as a fundamental human right" outcome, with voters exposed to this message significantly more likely to believe housing should be "completely earned" (22%, compared to 17% overall).

- These damaging effects were particularly notable among Independent voters exposed to the *American Dream = Safe, Stable Home* frame, which results in these voters expressing less favorable views on housing outcomes, including:
  - More likely to believe housing is a privilege (64%, compared to 54% *California Dream = Build What Matters to You* and 48% control)

- More likely to believe housing is an individual issue (64%, compared to 55% *California Dream = Build What Matters to You* and 52% control)

- Less likely to vote for a housing candidate (35%, compared to 43% *California Dream = Build What Matters to You* and 49% control)

Mindset Segments' Additional Reactions to Frames

During this phase of the research, the data also affirmed the mindset segments, deepening the research team's confidence in the personas as a means of understanding audiences.

A primary finding is that housing views of the mindset segments did not shift based on exposure to frames.

- Regardless of frame, Equity Enthusiasts and Dream Disruptors have more favorable views of housing outcomes, while Rugged Individualists have the least favorable views. American Dreamers lean in opposition and Pro-Government Pragmatists remain most neutral.

- Rugged Individualists remain predictable and unphased by narrative frames. For example, they exhibit no significant difference between the *California Dream = Build What Matters to You* and *American Dream = Safe, Stable Home* in their belief that housing is a fundamental human right (9% *California Dream = Build What Matters to You*, compared to 10% *American Dream = Safe, Stable Home* and 12% control).

Methodology

Overall Methodology Statement

Across all phases of this research, we used the most representative data sources and sampling methods available — given constraints like necessary sample size and modal requirements — to carry out each phase. All surveys were completed online due to constraints of some of the survey questions. The source for quantitative data was either the AmeriSpeak probability panel developed by the National Opinion Research Center at the University of Chicago or YouGov; the latter was used only for survey experiments.

The AmeriSpeak probability panel uses address-based sampling to recruit its panelists and provides the survey technology to those panelists who do not have regular access. We used AmeriSpeak for the audience segmentation because we wanted this segmentation to describe the California registered voting population as precisely and fully as possible.

YouGov's recruitment method relies upon sourcing panel participants who fill specific demographic quotas and then developing a sample frame for each survey that matches the demographic distribution of the target population. Given the high number of experimental conditions of the frame testing surveys, the research team required more than n=5,000 quality responses from registered California voters, which exceeds the available sample frame from AmeriSpeak or other high-quality probability panels. In addition, the analytic setup and goals of the experiments differed from the audience segments such that the research team felt confident using data collected by YouGov.

The target population for all research is registered California voters and is weighted to reflect that population using the most recent Current Population Survey Census benchmarks. All respondents are provided the option to opt out of the survey at any time. Responses are discarded if they have a high frequency of straightlining responses (e.g., consistently answering the same across multiple questions). All panelists have their identity verified to ensure they are real panelists and not from a bot farm. For those who complete the survey, they are provided with a nominal financial incentive for their participation. Where quantitative results are compared, the differences presented are statistically significant at a p-value of 0.05 or below.

Phase-by-Phase Summary

Phase 1: Media Monitoring
From January to June 2019, Protagonist reviewed content from national, local, and regional media (such as The Atlantic, LA Times, Mercury News, etc.), as well as blogs (Curbed LA, Bold Italic, etc.) and Spanish-language media (La Opinion, El Tecolote, etc.), to determine where and how frequently narratives appeared. The narrative landscape analysis also included first person expressions from Twitter and Reddit forums specific to housing in key California regions.

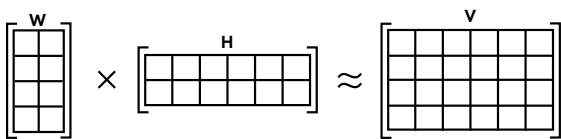### Phase 2: Foundational Qualitative Research

- Conducted from April to May 2019.

- Facilitated four focus groups with a total of 33 participants representing various regions of California and demographic characteristics.

- Managed online diaries with 25 participants with structured prompts about their perspective on the affordability housing crisis and possible solutions.

- Facilitated in-depth interviews in the homes of 12 participants in the Bay Area, Los Angeles area, and San Joaquin Valley.

Phase 3: Mindset Segmentation

The research team first developed mindset segmentation questions informed by the formative research and expert input. The questions were designed to sort voters according to their own deeply held values toward housing and their communities. The research team then ran a cluster analysis that takes as input responses to 88 unique values statements and identifies the unique clusters of mindset segments that exist within the data. Using responses to the values statement to understand preferences towards housing reform, POPSS ultimately developed the rich personas, with the distinctions between the mindset segments rooted entirely in voters' values.

- **Data source:** AmeriSpeak, an online, probability-based panel developed by the National Opinion Research Center at the University of Chicago

- **Sample size:** n=1,078

- **Field dates:** November 5–18, 2019

- **Sampling methodology:** Survey fielded to self-identifying registered voters in California; Margin of Error: ±3.94% for full sample

- **Weighting benchmarks:** Post-stratification weighting was performed to account for response bias and demographic imbalance. Weighting benchmarks included county, gender, age, income, education, and race/ethnicity and were based on proportions from the 2019 Current Population Survey.

- **Analytical process:**

  - Using response data from 88 Likert scale statements, ran a cluster analysis using non-negative matrix factorization (NMF). Non-negative matrix factorization is a method used to represent the model matrix (respondents X variables) with two new matrices, where one segments respondents and the second groups variables into clusters of highly correlated features. This method is often applied to high-dimensional datasets where the number of features exceeds 20. With this approach, we were able to cluster segment respondents according to their mindset segmentation variables and specify the variables that define each cluster. The known challenge within this method is the proper specification of the number of segments used in the factorization, which is supported by statistical validation methods designed for clustering problems.

- The best performing solution in both statistical (as determined by model diagnostic scores such as Silhouette and Dispersion metrics) and practical terms was the 5-segment option.

  Note that anywhere comparative values are presented, differences are significant at a p=value of 0.05 or below.

Our analysis identified an option with 5 segments (of balanced sizes)

Clusters (k)	5	Dispersion	0.66
Methodology	NMF	Largest segment %	28.2%
Silhouette score	0.39	Smallest segment %	17.2%

Phase 4: Frame Generation & Testing

Focus Groups

- Two 90-minute online focus groups with each of the five segments for a total of ten groups.

- One group for each segment was completed among voters in Southern California and one among voters in the San Francisco Bay Area.

- Recruited participants completed a typing tool that classified them into one of the segments.

- Each group had 4–5 participants.

Quantitative Survey

For the survey experiment, the sample was randomized into seven groups of roughly 800 people, and each group was exposed to one of the six frames below (with the seventh group as the control). Voters were first asked about their baseline attitudes toward housing, including issue salience, perception of housing as a right or privilege, perception of housing as an individual or collective issue, as well as support/opposition for the 3Ps. After exposure to the frames, participants were again asked attitudinal questions, with statistically significant differences in attitudes and motivation attributed to their exposure to the frames.

- **Data source:** YouGov, an online survey panel with a sample frame developed by targeted quota recruitment followed by a random selection of units within each quota cell.

- **Sample size:** n=5,734

- **Field dates:** January 3–February 8, 2021, with a pause from January 7–27, 2021, to avoid data collection following the insurrection of the U.S. Capitol on January 6. (Responses collected before January 7 and those collected after January 27 were compared to ensure no systematic differences existed.)

- **Languages:** English, Spanish

- **Margin of Error:** ±1.4%

- **Weighting benchmarks:** Gender, age, education, and race/ethnicity

- **Analytical notes (significance):** All comparative statistics are statistically significant at a p-value of 0.05 or below

Phase 4.5: Frame and Outcome-Specific Message Testing

During this phase, researchers crafted outcome-specific messages for each of the narrative frames, in a way that stayed true to the tenor of the frame while being more direct in the outcome of interest. Respondents were randomly assigned to be exposed to one of eight frame and outcome pairings, a competing narrative frame, or a pure control, and then posed a series of outcome questions. After exposure to a frame, any statistically significant differences in an outcome variable is attributed to exposure to the frame.

- **Data source:** YouGov, an online survey panel with a sample frame developed by targeted quota recruitment followed by a random selection of units within each quota cell

- **Sample size:** n=5,023

- **Field dates:** May 29–June 17, 2021

- **Margin of Error:** ±1.6%

- **Weighting benchmarks:** Gender, age, education, and race/ethnicity

- **Analytical notes (significance):** All comparative statistics are statistically significant at a p-value of 0.05 or below

AGENDA ITEM 6
REPORT

Southern California Association of Governments

April 7, 2022

To: Community Economic & Human Development Committee (CEHD)
Energy & Environment Committee (EEC)
Transportation Committee (TC)

From: Sarah Dominguez, Program Manager II
(213) 236-1918, dominguezs@scag.ca.gov

Subject: Policy Development Framework for Connect SoCal 2024

EXECUTIVE DIRECTOR'S APPROVAL

Kome Ajise

RECOMMENDED ACTION FOR CEHD, EEC AND TC:
Information Only – No Action Required

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal 1: Produce innovative solutions that improve the quality of life for Southern Californians.

EXECUTIVE SUMMARY:
In July 2021, the Executive Administration Committee convened for a strategic planning session. One action identified during that session was to create a Policy Development Framework for Connect SoCal 2024. Connect SoCal 2024, the 2024 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS), will be prepared by SCAG over the next two years, in anticipation of an April 2024 adoption date. SCAG will build from the strategies and policies established in Connect SoCal 2020, such as the Core Vision and Key Connections. However, in developing Connect SoCal, SCAG must continue to monitor and reexamine trends and emerging issues in order to put forth a plan that addresses the region's evolving needs, challenges and opportunities. The attached draft Policy Development Framework for Connect SoCal 2024 outlines the approach for policy development with the existing Policy Committees and three new sub-committees.

BACKGROUND:

What is Connect SoCal 2024?
SCAG prepares a long-range RTP/SCS every four years which provides a vision for integrating land use and transportation for increased mobility and more sustainable growth.

SCAG's next RTP/SCS, Connect SoCal 2024, will incorporate important updates of fundamental data, enhanced strategies and investments based on, and intended to strengthen, the plan adopted by
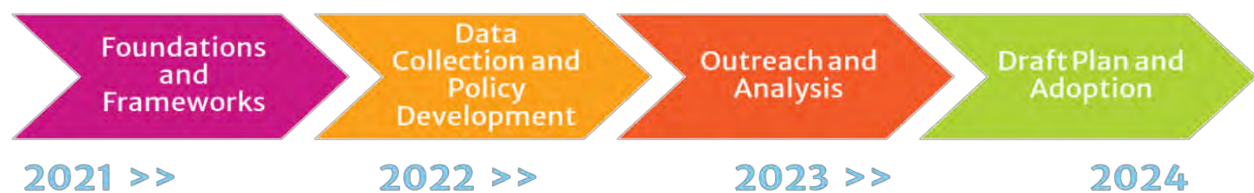
the SCAG Regional Council in 2020. The pillars of the Connect SoCal—the *Core Vision* and *Key Connections*—are anticipated to continue into the next plan. The *Core Vision* centers on maintaining and better managing the transportation network we have for moving people and goods, while expanding mobility choices by locating housing, jobs and transit closer together and increasing investment in transit and complete streets. The *Key Connections* augment the *Core Vision* of the plan to address trends and emerging challenges. These *Key Connections* lie at the intersection of land use, transportation and innovation to accelerate progress on regional planning goals. For this plan development cycle, SCAG staff will focus on process improvements and data updates and refinements. However, in developing Connect SoCal, SCAG must continue to monitor and reexamine trends and emerging issues in order to put forth a plan that addresses the region's evolving needs, challenges and opportunities.

Connect SoCal 2024: Status Update
As described at the February 2022 Joint Policy Committee Meeting, SCAG is now entering into the "Data Collection and Policy Development" phase of plan development.

Throughout 2022, staff will be continuing with research to better understand the trends and existing conditions in the region. This phase also includes steps to understand the existing conditions and planning occurring at the local jurisdiction level through the Local Data Exchange process and engagement with County Transportation Commissions on the Project List later this year. Over the course of the next year and in the first half of 2023, SCAG staff will be seeking direction from our policy makers, through the relevant Policy Committees, on the priorities and strategies for Connect SoCal 2024 to augment and help better align plans and investments across the region.

Phases of Connect SoCal 2024 Development

Foundations and Frameworks — 2021 >>
Data Collection and Policy Development — 2022 >>
Outreach and Analysis — 2023 >>
Draft Plan and Adoption — 2024

Policy Development Framework for Connect SoCal 2024
In July 2021, President Lorimore convened a strategic planning session for the Executive Administration Committee (EAC) and executive staff to establish high-level work goals and priorities for work planning for the year. The resulting EAC Strategic Work Plan identified elevating and expanding policy leadership as a central measure to advancing the EAC's goals and priorities. Among the tasks assigned to staff to expand policy leadership was the development of a Policy Development Framework for Connect SoCal 2024. Per the EAC Strategic Work Plan:

"Working with the Executive Officers and the Policy Committee Chairs and Vice Chairs to develop a Policy Development Framework for 2024 Connect SoCal that identifies priority policy issues for deeper discussion and establishes a sub-committee structure for policy education, engagement, and consensus building to guide visionary policy development (March 2022)"

The attached draft Policy Development Framework for Connect SoCal 2024 includes the preliminary plan vision and goals, key policy priorities, and an outline for the focus and responsibility of each Policy Subcommittee and three new sub-committees to consider opportunities to incorporate new policy direction and priorities identified by the board since 2020 into the regional plan.

In March 2022, SCAG staff shared this draft with the EAC for initial feedback. Several members highlighted the need to address or discuss water in relationship to planned development. Staff noted that in Connect SoCal 2020 we incorporated water considerations through the Housing Supportive Infrastructure Key Connection and through analysis in the Program Environmental Impact Report. Staff will explore how best to address this issue within the requirements and goals for Connect SoCal 2024.

Next Steps
SCAG staff will incorporate feedback and input from each Policy Committee into a revised Policy Development Framework before seeking a recommendation for adoption by the EAC and RC in June 2022.

Following adoption, SCAG will circulate a survey to all members, anticipated in June of this year, to assess interest in policy issues and in serving on one of the sub-committees. Following the results of this survey, SCAG will work with the President and Executive Officers establish the sub-committees and prepare a more detailed policy committee agenda outlook for each of the Committees to illustrate the progression of policy discussions leading up to plan analysis and production in Summer 2023.

Later this year, SCAG will be onboarding a consultant to assist with Public and Stakeholder Engagement for the plan. Early deliverables from that work will include educational materials to help stakeholders better understand the regional planning process as well as issue papers to inform the policy development process.

FISCAL IMPACT:
Work associated with this item is included in the FY 21-22 Overall Work Program (310.4874.01: Connect SoCal Development).

ATTACHMENT(S):

1. CSC24_PolicyDevelopmentFramework
2. PowerPoint Presentation - Policy Development Framework

Draft Policy Development Framework for Connect SoCal 2024

Connect SoCal 2024, the 2024 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS), will be prepared by SCAG over the next two years, in anticipation of an April 2024 adoption date. Prepared in response to direction by the Regional Council, the Draft Policy Development Framework presents the Draft Plan Vision and Goals, Policy Priorities to be expanded and refined through the planning process to advance the vision and goals, and a policy development leadership structure and outlook to foster policy education, engagement, consensus building and decision-making.

DRAFT PLAN VISION AND GOALS

In January 2022, staff began engaging with stakeholders through the Regional Planning Working Groups on the draft Goals & Vision for Connect SoCal 2024.

The draft Vision is meant to capture what we want the region to be by 2050 and is supported by four draft Goals, each centered around a key theme (Mobility, Communities, the Environment, and the Economy). These goals will each be further defined by supporting sub-Goals. In addition, staff aim to integrate overarching through lines of Equity and Resilience across the goals.

DRAFT VISION STATEMENT

Option 1: A healthy, equitable and resilient region that works together to plan effectively for the challenges of tomorrow.

Option 2: A healthy, accessible and connected region for a more resilient and equitable future.

DRAFT GOALS

Mobility: Build and maintain a robust transportation network.

- Support investments that are well-maintained and operated, coordinated, and resilient, and result in improved safety and air quality and minimize greenhouse gas emissions.
- Ensure reliable, accessible, affordable, and appealing travel options are readily available, while striving to enhance equity in the offerings in high need communities.
- Support planning for people of all ages, abilities, and backgrounds.

Communities: Develop, connect and sustain communities that are livable and thriving.

- Create human-centered communities in urban, suburban, and rural settings to increase mobility options and reduce travel distances.
- Produce and preserve diverse housing types in an effort to improve affordability, accessibility, and opportunities for all households.

Environment: Create a healthy region for the people of today and tomorrow.

- Develop communities that are resilient and can mitigate, adapt to, and respond to chronic and acute stresses and disruptions, such as climate change.
- Integrate the region's development pattern and transportation network to improve air quality and reduce greenhouse gas emissions.
- Conserve the region's resources.

Economy: Support a sustainable, efficient, and productive regional economic environment that provides opportunities for all residents.

- Improve access to jobs and educational resources.
- Advance a resilient and efficient goods movement system that supports the economic vitality of the region, attainment of clean air, and quality of life for our communities.

After engaging with stakeholders to add to, edit, and modify the above draft statements, staff will bring these draft Vision and Goals concurrently to each Policy Committees in June 2022 alongside draft plan Performance Measures.

POLICY PRIORITIES

The Draft Policy Priorities are based upon policy direction established in Connect SoCal 2020 and recent Regional Council actions to address three of the emerging issues facing the region. The pillars of Connect SoCal 2020—the *Core Vision* and *Key Connections*—are outlined below followed by a summary of the emerging issues and related actions.

CORE VISION

Rooted in the 2008 and 2012 RTP/SCS plans, Connect SoCal's *Core Vision* centers on maintaining and better managing the transportation network we have for moving people and goods, while expanding mobility choices by locating housing, jobs and transit closer together and increasing investment in transit and complete streets.

- Sustainable Development
- System Preservation & Resilience
- Demand & System Management

- Transit Backbone
- Complete Streets
- Goods Movement

Many of the policies and strategies summarized as the *Core Vision* of the plan are reflective of the policies and projects developed at the local level and gathered by SCAG through the plan development process (through the Local Data Exchange with Local Jurisdictions and Project List submissions from County Transportation Commissions). The Core Vision strategies will be discussed during plan development to identify barriers to implementation and opportunities for enhancement.

KEY CONNECTIONS

Connect SoCal 2020 introduced *Key Connections* that build on the *Core Vision* to leverage technology or advance policy needed to accelerate reaching plan goals. Key Connections identify critical regional strategies to "close the gap" between what could be accomplished through intensification of core planning strategies alone, and what must be done to meet increasingly aggressive greenhouse gas reduction goals. The Key Connections lie at the intersection of land use, transportation and innovation, aiming to coalesce policy discussions and advance promising strategies for leveraging new technologies and partnerships to accelerate progress on regional planning goals. The policies and strategies identified as *Key Connections* became the focal point for SCAG implementation efforts in directing research priorities and local technical assistance.

- Smart Cities & Job Centers
- Housing Supportive Infrastructure
- Go Zones

- Accelerated Electrification
- Shared Mobility & Mobility as A Service (MaaS)

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In developing both the Core Vision and Key Connections, SCAG works with stakeholders, identifies trends and data in the region, assesses local best practices and researches the efficacy of different strategies. SCAG also needs strategic input and direction from Policy Committee members and the Regional Council.

EMERGING ISSUES

There are three salient and interconnected challenges facing our region: equity, resilience, and the economy. Actions by SCAG's Regional Council over the past year and a half provide a policy foundation for work on the next plan development and expanded policy focus on these emerging issue areas.

Equity

On July 2, 2020, the Regional Council adopted Resolution No. 20-623-2[1] on Racial and Social Justice, affirming SCAG's commitment to meaningfully advance justice, equity, diversity and inclusion, and establishing the Special Committee on Equity and Social Justice to advance social justice throughout the agency.

On May 6, 2021, the Regional Council adopted the Racial Equity Early Action Plan[2], the purpose of which is to guide and sustain SCAG's regional leadership in service of equity and social justice. It reflects discussions and feedback provided to the Special Committee on the definition of equity and overarching goals and strategies to advance racial equity through SCAG's policies, practices and activities.

Resilience

On January 7, 2021, the Regional Council adopted Resolution No. 21-628-1[3] on Climate Change Action that affirms a climate change crisis in Southern California and identifies actions for SCAG to undertake, including: developing a regional resilience framework, initiating a regional climate planning network, and developing a regional advanced mitigation program (RAMP).

Economy

On July 1, 2021, the Regional Council adopted the Inclusive Economic Recovery Strategy (IERS) Final Report and Recommendations[4], which identifies five core principles to drive SCAG's work and to act as a lens for identifying recommendations:

1. Center the economic recovery strategy on racial and gender equity; focusing in reducing the racial wealth gap;
2. Focus on rebuilding the middle class with high road employment;
3. Ensure that all strategies contribute to a climate ready region;
4. Tailor strategies to the needs of both industry sectors and geographic subregions; and
5. Bring new and diverse voices to the table.

On February 4, 2021, the Regional Council adopted Resolution No. 21-629-2[5] to establish a Broadband Action Plan to assist in bridging the digital divide. The Broadband Action Plan includes incorporating

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[1] https://scag.ca.gov/sites/main/files/file-attachments/rc070220agn01.pdf?1602368143
[2] https://scag.ca.gov/sites/main/files/file-attachments/rc050621fullpacket.pdf#page=91
[3] https://scag.ca.gov/sites/main/files/file-attachments/rc010721fullpacket.pdf#page=12
[4] https://scag.ca.gov/sites/main/files/file-attachments/rc070121fullpacket.pdf#page=13
[5] https://scag.ca.gov/sites/main/files/file-attachments/rc020421fullpacket.pdf#page=13

broadband planning, data and research findings, and strategies, as appropriate, into existing SCAG programs and future Regional Transportation Plan/Sustainable Communities Strategies.

POLICY DEVELOPMENT: LEADERSHIP & OUTLOOK

Policy discussions that occur during SCAG's Policy Committee meetings provide valuable direction to staff on areas for further research, potential strategies to address regional challenges, and priorities for what to include in the proposed plan.

Staff will bring forward informational and discussion items related to the relevant *Core Vision* and *Key Connections*; highlighting context and data from staff research; perspectives from academics, researchers or policy experts; and insights from local practitioners. Presentations may also focus on current subregional efforts and best practices to address the Connect SoCal 2020 Key Connections, as well as emerging trends and new issues related to each *Core Vision* or *Key Connection*. The plan issue areas organized by Policy Committee are outlined in the table below.

MAIN POLICY COMMITTEES

TRANSPORTATION COMMITTEE	COMMUNITY, ECONOMIC, HUMAN DEVELOPMENT COMMITTEE	ENERGY AND ENVIRONMENT COMMITTEE
Core Vision		
• System Preservation & Resilience • Demand & System Management • Transit Backbone • Complete Streets • Goods Movement	• Sustainable Development	• Sustainable Development
Key Connections		
• Go Zones • Shared Mobility & MaaS • Smart Cities & Job Centers	• Smart Cities & Job Centers • Housing Supportive Infrastructure	• Accelerated Electrification
		Environmental Compliance
		• PEIR • Transportation Conformity • Environmental Justice • SB 375 Technical Methodology

JOINT POLICY COMMITTEE

The issues facing the region are intersectional and often do not neatly fit within one committee. For that reason, it is occasionally necessary to hold a Joint Policy Committee meeting of members from all three Policy Committees (Transportation; Community, Economic, Human Development; and Energy and

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Environment) to share pertinent information, discuss key plan development issues or seek coordinated actions or recommendations.

SPECIAL CONNECT SOCAL 2024 SUB-COMMITTEES

As discussed at the February 2022 Joint Policy Committee Meeting, there are a number of trends disrupted by the pandemic and emerging issues setting the context for the next Connect SoCal. To help dive deeper into key areas for Connect SoCal, SCAG will establish three new sub-committees.

These three sub-committees will be comprised of members from each county as well as select non-voting members representing business or civic leaders with unique and valuable perspective on the given sub-committee focus area.

These sub-committees will prepare and make recommendations to SCAG Policy Committees on how to address these emerging issues within Connect SoCal 2024.

NEXT GENERATION INFRASTRUCTURE	RESILIENCE & CONSERVATION	RESTORATIVE JUSTICE
Purpose: Build on the recommendations for the Inclusive Economic Recovery Strategy to identify ways Connect SoCal can ensure opportunities for all; and explore solutions for making the most of existing infrastructure to maintain and improve levels of service such as through innovations in Broadband and System Demand Management.	*Purpose:* Advance the direction set in the SCAG Regional Council Resolution on Climate Change Action to consider opportunities for enhanced conservation and how can Connect SoCal support our communities in adapting to changing conditions or mitigating risks to become more resilient.	*Purpose:* Identify opportunities to advance racial equity through the policies and strategies in Connect SoCal and guide how our planning and investments over the next 30 years can address and rectify the effects of racially discriminatory policies in SCAG's environmental justice communities.

Policy Development Framework
SCAG's Regional Transportation Plan/Sustainable Communities Strategy

April 7, 2021

www.scag.ca.gov

Policy Development Framework Overview

- **Draft Vision and Goals**
  - Mobility, Communities, Environment, Economy

- **Policy Priorities**
  - Core Vision
  - Key Connections
  - Emerging Issues

- **Policy Development:** Leadership & Outlook

Draft Connect SoCal 2024 Vision and Goals

- **Vision Statement** to capture what we want the region to be

- Four simplified Goals
  - Themes: **Mobility**, **Communities**, **Environment**, and **Economy**
  - Further defined through sub-goals

- Overarching through lines to integrate into the 2024 cycle: **Equity** and **Resilience**

Policy Priorities

CORE VISION

- Sustainable Development
- System Preservation & Resilience
- Demand & System Management
- Transit Backbone
- Complete Streets
- Goods Movement

KEY CONNECTIONS

- Smart Cities & Job Centers
- Housing Supportive Infrastructure
- Go Zones
- Accelerated Electrification
- Shared Mobility & Mobility as A Service (MaaS)

EMERGING ISSUES

- Equity
- Resilience
- Economy

Policy Development: Leadership & Outlook

TRANSPORTATION COMMITTEE	COMMUNITY, ECONOMIC, HUMAN DEV COMMITTEE	ENERGY & ENVIRONMENT COMMITTEE

CORE VISION

- System Preservation & Resilience
- Demand & System Management
- Transit Backbone
- Complete Streets
- Goods Movement

- Sustainable Development

- Sustainable Development

KEY CONNECTIONS

- Smart Cities & Job Centers
- Shared Mobility & Mobility as a Service (MaaS)
- Go Zones

- Smart Cities & Job Centers
- Housing Supportive Infrastructure

- Accelerated Electrification

ENVIRONMENTAL COMPLIANCE

- PEIR
- Transportation Conformity
- Environmental Justice
- SB 375 Technical Methodology

Transportation Committee

CORE VISION

- System Preservation & Resilience
- Demand & System Management
- Transit Backbone
- Complete Streets
- Goods Movement

KEY CONNECTIONS

- Smart Cities & Job Centers
- Shared Mobility & Mobility as a Service (MaaS)
- Go Zones

Community, Economic, Human Development Committee

CORE VISION

- Sustainable Development

KEY CONNECTIONS

- Smart Cities & Job Centers
- Housing Supportive Infrastructure

Energy and Environment Committee

CORE VISION

- Sustainable Development

KEY CONNECTIONS

- Accelerated Electrification

ENVIRONMENTAL COMPLIANCE

- PEIR
- Transportation Conformity
- Environmental Justice
- SB 375 Technical Methodology

Special Connect SoCal 2024 Sub-Committees

NEXT GENERATION INFRASTRUCTURE

PURPOSE

Build on the recommendations for the Inclusive Economic Recovery Strategy to identify ways Connect SoCal can ensure opportunities for all; and explore solutions for making the most of existing infrastructure to maintain and improve levels of service such as through innovations in Broadband and System Demand Management.

RESILIENCE & CONSERVATION

PURPOSE

Advance the direction set in the SCAG Regional Council Resolution on Climate Change Action to consider opportunities for enhanced conservation and how can Connect SoCal support our communities in adapting to changing conditions or mitigating risks to become more resilient.

RESTORATIVE JUSTICE

PURPOSE

Identify opportunities to advance racial equity through the policies and strategies in Connect SoCal and guide how our planning and investments over the next 30 years can address and rectify the effects of racially discriminatory policies in SCAG's environmental justice communities.

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Attachment: PowerPoint Presentation - Policy Development Framework (Policy Development Framework for Connect SoCal 2024)

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