



SOUTHERN CALIFORNIA  
ASSOCIATION OF GOVERNMENTS  
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Los Angeles, CA 90017  
T: (213) 236-1800  
[www.scag.ca.gov](http://www.scag.ca.gov)

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## MEETING OF THE

# TECHNICAL WORKING GROUP

*Thursday, July 15, 2021*  
**10:00 a.m. – 12:00 p.m.**

### JOIN ZOOM MEETING

[HTTPS://SCAG.ZOOM.US/J/142774637](https://scag.zoom.us/j/142774637)

OR

### DIAL BY YOUR LOCATION

**+1 669 900 6833 US TOLL**

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**MEETING ID: 142 774 637**

If members of the public wish to review the attachments or have any questions on any of the agenda items, please contact Kevin Kane at (213) 236-1828 or [kane@scag.ca.gov](mailto:kane@scag.ca.gov). Agendas for the Technical Working Group are also available at <https://scag.ca.gov/technical-working-group>

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) 630-1402. 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.

## Agenda

1. TWG Draft Charter  
Kevin Kane  
*Page 4*
2. Introduction to SCAG Regional Data Platform  
Tom Vo  
*Page 6*
3. SoCal Greenprint Update  
Kimberly Clark  
*Page 14*
4. Connect SoCal 2020 Priority Growth Areas Recap  
Lyle Janicek  
*Page 22*
5. Connect SoCal Data Sharing Protocol Discussion  
Kimberly Clark  
*Page 26*
6. Connect SoCal 2024 growth forecasting and local jurisdiction input: Preliminary stages and target dates  
Kevin Kane  
*Page 32*
7. Connect SoCal 2024 Subregional SCS Framework and Guidelines  
Sarah Dominguez  
*Page 33*
8. TWG Agenda Outlook  
Sarah Dominguez and Kevin Kane  
*Page 51*

# TWG attendees by group (registration as of 11am, 7/13/2021)

## 1. Land Use Authorities

Name	Title	Organization Affiliation
Gibson, Sean	Deputy Environmental Services Director/City Planner	City of Simi Valley
Marquez, Gerardo	Associate Planner	City of San Fernando
Kim, Lisa	Assistant City Manager	City of Garden Grove
Taylor, Christina	Community Development Director	City of Beaumont
Matloc, Benjamin	City Planner	City of Yucaipa
Glesne, Matt	Senior City Planner	Los Angeles Department of City Planning
Pallini-Tipton, Conni	Senior City Planner	Los Angeles Department of City Planning
Espinoza, Marco	Senior Planner	City of San Dimas
Kitzerow, Cheryl	Community Development Director	City of Meiffee
Siques, Joaquin	Deputy Director of Transportation	City of Pasadena, Transportation Department
Aube, Nicolle	Senior Analyst	City of Huntington Beach
Palacios, Aksel	Planning and Economic Development Deputy	Council District 15, City of LA
Martinez, Patrick	Director of Development Services	City of Needles
Taggart, Megan	Planning Manager	City of Palmdale
Gonzalez, Julia	Deputy Director	City of Pico Rivera
Farnsworth, Nate	Planning Manager	Yorba Linda
Morrell, Wayne	Director of Planning	City of Santa Fe Springs

## 2. Regional Partners

Name	Title	Organization Affiliation
Fagan, Amanda	Director of Planning & Sustainability	Ventura County Transportation Commission
Lee, Josh	Chief of Planning	SBCTA
Fung, Alexander	Senior Management Analyst	SGVCOG
Whiteaker, Warren	Principal Transportation Analyst	OCTA
Gray, Chris	Deputy Executive	WRCOG

## 3. Regulatory and Coordinating Agencies

Name	Title	Organization Affiliation
San, Tina	Associate Transportation Planner	Caltrans
Struhl, Mine	Office Chief, Complete Streets and Climate Change	Caltrans
Lee, Sang-Mi	Program Supervisor	South Coast Air Quality Management District
Campbell, Helen	Senior Planner	California Governor's Office of Planning and Research
Tuerpe, Michael	Senior Analyst	San Bernardino LAFCO

## 4. Field Experts

Name	Title	Organization Affiliation
Rodnyansky, Seva	Assistant Professor	Occidental College
Mendoza, Eduardo	Research Associate	USC Population Dynamics Research Group
Kin, Nina	Tech Lead	LA Metro
O'Neill, Moira	Associate Research Scientist	University of California, Berkeley
Diep, Deborah	Director	CDR/CSUF



## SCAG Working Group DRAFT Charter

### Technical Working Group (TWG)

#### Purpose

The purpose of the Technical Working Group (TWG) for regional planning and growth is to enhance the quality, data integrity and transparency of the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) by providing a venue for SCAG staff to discuss and receive feedback on growth-related technical approaches, data collection and technical tools associated with the development, implementation, and monitoring of the RTP/SCS with local and regional planning partners, regulatory and coordinating agencies, and technical experts. The working group shall not serve as a policy, legislative or voting body and thus meetings are not subject to the Brown Act.

#### Membership

The working group shall be comprised of members from four core groups:

- 1) **Land-Use Authorities:** The 191 cities and six counties responsible for land-use planning in the SCAG region. All local jurisdictions will be invited to participate by designating a formal member to serve on the working group. Following an initial solicitation for members, SCAG will pursue targeted outreach in consultation with sub-regional councils of governments to specific jurisdictions to ensure representation from across SCAG's 69 population-based regional council districts and from jurisdictions of varying size and conditions to reflect the diversity of the SCAG region.
- 2) **Regional Partners:** Representatives from the subregional councils of governments (COGs) and county transportation commissions (CTCs) that work closely with SCAG to collect and validate plan data, including assembling information from local land-use plans and county-wide long-range transportation plans to facilitate bottom-up, integrated planning.
- 3) **Regulatory and Coordinating Agencies:** Key federal, state and regional agencies with whom SCAG regularly collaborates to ensure plans are in compliance with federal and state laws.
- 4) **Field Experts:** Experts in the technical dimensions of regional growth are invited to participate in order to bring additional skill in land use and transportation planning, regional demographics and economics, scenario planning, housing planning, civic data, resource conservation, water and infrastructure, urban development, and other topics as may be needed.

Each of the invited groups will be asked to designate an official member to serve on the working group for a four-year period, commensurate with the RTP/SCS planning cycle. The designated representative should be available to actively participate in six (bi-monthly) meetings per year. If unable to commit to ongoing participation and service on the working group, invited groups may attend meetings and access agendas and materials posted publicly on SCAG's website. Membership and participation will be actively monitored to ensure that diversity across the region and stakeholder groups is maintained.



## Focus

The focus of the working group will be on growth-related technical approaches related to the development, implementation, and monitoring of the RTP/SCS. Core topics will include growth forecast development, local input and data development/collection, the development and application of technical tools including SCAG's Regional Data Platform, SCAG open data, technical aspects of RTP/SCS scenario planning, performance monitoring and reporting including in relation to Senate Bill 150, and related items. The TWG for regional planning and growth is part of SCAG's broader set of stakeholder working and advisory groups and is intended to have a technical focus. Other groups are convened that focus on regional policy issues.

## Responsibilities

The working group will provide a forum for discussing growth-related technical issues of shared regional importance consistent with identified focus areas. Agendas will be set by SCAG staff based on RTP/SCS development needs, and pertinent stakeholder input and presentations are welcomed. SCAG staff will act as meeting facilitator.

## Meeting Time and Location

The working group will meet bi-monthly on a regular basis. Meetings are generally held on the third Thursday of odd-numbered months from 10 a.m. to noon virtually or at SCAG's Los Angeles headquarters. Additional meetings may be scheduled if circumstances warrant and may occur at the same time during even-numbered months. Attendance and meeting summaries will be prepared, circulated, and posted online by SCAG staff. SCAG staff will aim to distribute and post-meeting agendas and materials at least 48 hours in advance (i.e., Tuesday morning prior to regularly scheduled meetings).

## Term of Membership

The working group is intended to support the development of SCAG's RTP/SCS. Members will be invited to serve on the working group for four-year terms, commensurate with each planning cycle. New members may be added during this cycle at SCAG's discretion to allow invited groups to replace a designated member and/or to ensure that diversity across the region and stakeholder groups is maintained.

## SCAG Regional Data Platform

<https://scag.ca.gov/regional-data-platform>

Javier Aguilar, Jonathan Holt, Hsi-Hwa Hu, Frank Wen, and Tom Vo  
 Technical Working Group  
 Thursday, July 15, 2021

[www.scag.ca.gov](http://www.scag.ca.gov)



## RDP Project Team



### Executive Team

Project Sponsors: Sarah Jepson, Julie Shroyer, Hsi-Hwa Hu, Frank Wen, Jason Greenspan, P&PA

Project Manager — Javier Aguilar

Business Lead - Local Planning:  
Tom Vo

Business Lead - Regional Planning:  
Javier Aguilar

Technical Lead:  
Jonathan Holt

### Subject Matter Experts:

- SCAG Planners/GIS Power Users—Use GIS to develop regional policies, plans and to support member agencies
- SCAG Planners/Data Management Specialist—integration of data into regionally significant data sets, SPM and model coordination
- IT Specialists

## The Region Faces Big Challenges...

**Population Growth**

**Transportation**

**446 million** miles driven each day

**Location Efficiency**

Transit Oriented Development

Active Transportation

**Housing Crisis**

6<sup>th</sup> Cycle RHNA

**Climate Change Adaptation**

Safety

Air Quality and GHG Targets

Sustainability

**Inclusive Economic Recovery**

**Equity**

Environmental Justice

COVID-19

Public Health

3

**Connect SoCal is the big picture vision for a sustainable Southern California**

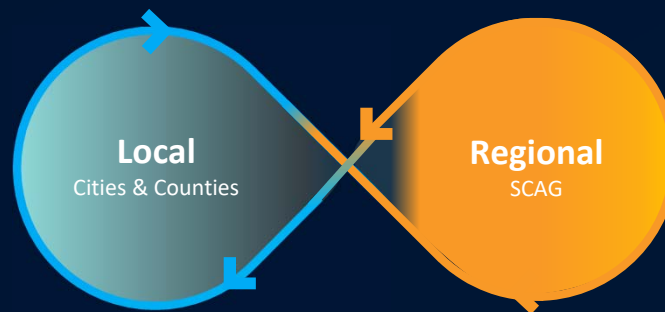
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## Local Jurisdiction General Plans are the individual puzzle pieces that bring Connect SoCal into focus

5

### Addressing These Challenges...

Requires Planning, Engagement & Data Sharing



- Struggle to update local General Plan
- Struggle to do regional forecasting & planning
- Need data, tools, resources, and support
- Need accurate, complete, and current local data

6



## Introducing the Regional Data Platform...

### Project Goals

1. **Facilitate stronger local planning by providing modern tools and best practices to assist with General Plan Updates**
2. **Streamline the process of collecting and integrating data from member agencies to SCAG to enhance regional planning**

Supporting **regionally aware** local planning  
And **locally informed** regional planning

*For a more cohesive and sustainable region...*

## A Platform for a Smarter Region

### The SCAG Regional Data Platform

- A robust system of systems for regional data sharing and collaboration
- Facilitates better planning at all levels
- Provides a platform to support a variety of SCAG initiative and programs



Supporting **regionally aware** local planning  
And **locally informed** regional planning

*For a more cohesive and sustainable region...*

**SCAG HELPR 2.0** Housing Element Parcel Tool

Select a Jurisdiction  
City or County (Unincorporated) is  
Garden Grove  
Garden Grove has a 2019 population of 175155 and a final 6th cycle RHNA allocation of 19123. [More info](#)

**Filter Parcels**  
Standard Filters    ADU Filters  
Filter parcels with physical space for detached ADU. Toggle one at a time to explore different assumptions.

- Baseline Assumptions
- Reduced setback (from 4 to 2 ft)
- Smaller ADU (from 800 to 600 sf)
- Removed parking space (200 sf)
- Reduced setback and smaller ADUs
- Reduced setback and removed parking space
- Smaller ADU and removed parking
- Reduced setback, smaller ADU, and removed parking

Number of Selected Parcels  
**32,711**

[Download Parcels \(CSV\)](#)    [Download Parcels \(SHP\)](#)

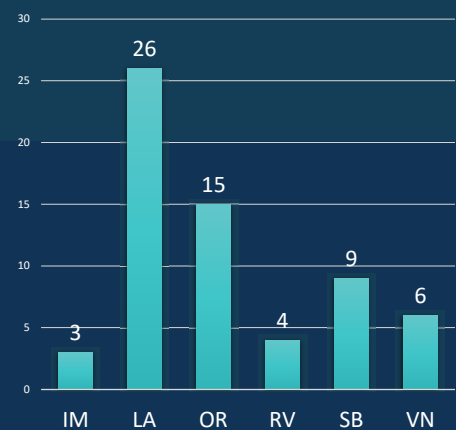
HELPR Tool URL - <https://maps.scag.ca.gov/helpr/>  
v2.0 release demo - <https://www.youtube.com/watch?v=9aMsFqBHVuU>

## Local Information Services Team (LIST) & General Plan Technical Assistance Introduction ([list@scag.ca.gov](mailto:list@scag.ca.gov))



- Coordinate, plan, and develop a system to:
  - (1) link SCAG's value-added products (e.g., data, applications, etc.) to address local information and analytical needs of SCAG's local gov'ts,
  - (2) deliver technical assistance for use of data, tools, and modeling, and
  - (3) provide opportunity for local governments to submit feedback on how SCAG can improve products for better collaboration
- Currently, LIST is focusing on the General Plan (e.g. housing, safety, and EJ, etc.)

Completed LIST Trainings by Local Jurisdictions



## RDP License Rollout Survey Results ([license-rdp.scag.ca.gov](https://license-rdp.scag.ca.gov))



- As of 7/7/2021, the RDP license rollout has contacted all 197 local jurisdictions
  - 125 (63%) have requested licenses so far
    - ArcGIS Online
    - ArcGIS Pro
    - ArcGIS Urban
    - ArcGIS Business Analyst
    - ArcGIS Hub

**Request a License**

As part of the Regional Data Platform, we are pleased to provide a suite of Esri licenses to one individual within your jurisdiction to support your planning work and build technological capacity in the region.

To request access to this software, please complete the license request survey to the right.

- Your request will be reviewed by SCAG. Once approved, you will receive an email with your account information.
- The licenses are provisioned and accessed through the SCAG Regional Data Platform ArcGIS Online organization.

This one account gives you access to:

- ArcGIS Online
- ArcGIS Pro (Standard)
- ArcGIS Urban
- ArcGIS Business Analyst
- Access to ArcGIS Hub (Coming Soon!)

**Email\***  
Please use your government issued email.

**First Name\***

**Last Name\***

**City or County Agency Name\***  
Please Select

**Job Title\***

**Do you already use ArcGIS or Esri software in your work?**

Yes  No

## Sprint Meetings with Pilot Jurisdictions



- Piloting jurisdictions (9) – Los Angeles, Long Beach, Barstow, Eastvale, Fullerton, Pico Rivera, Ventura, Imperial County, and San Bernardino County
- Sprint Meetings: March 18 (21 participants), April 8 (19 participants), April 29 (17 participants), May 20 (14 participants), June 10 (18 participants), July 1 (24 participants)
  - Act 1: Geospatial Infrastructure
  - Act 2: Planning & Engagement Tools
  - Act 3: Data Orchestration



## RDP User Testing Plan



- Testing Period: July 19 – August 6, 2021
- Max of 16 – 20 hours of total testing time
- Will review the plan with testers one week before User Testing begins
- Limited to 5 testers per jurisdiction and unlimited to SCAG staff
- 32 local staff and at least 29 SCAG staff have signed up!
  - Barstow (5), Ventura (3), Pico Rivera (3), IM County (1), Fullerton (2), Long Beach (7), Los Angeles (9), SB County (3)
- One of the tools is the Local Input Editor Tool
  - <https://youtu.be/m7DHt07azMY?t=1396>

## RDP Special Presentation at 2021 Esri User Conference



- 2021 Esri User Conference (SCAG's customer ID: 065)
  - July 14, 2021, 1:45pm-2:45pm
  - <https://www.esri.com/en-us/about/events/uc/registration#register>

### Wednesday

14 July 2021

\*All times PDT

Introducing the Regional Data Platform (RDP) for Southern California ★

1:45 p.m. – 2:45 p.m.

📺 Streaming Live

SPECIAL PRESENTATION

The Southern California Association of Governments (SCAG) will be hosting a special workshop showcasing the newly developed capabilities and features of the soon-to-be launched Regional Data Platform (RDP) pilot project. The RDP is SCAG's biggest and most transformational initiative to date - providing a robust system for regional information sharing and collaboration to support more effective local and regional planning. During this hour-long session, SCAG and Esri will demonstrate tools and applications for local planning that will be made available to all SCAG jurisdictions at launch, and showcase some features that will be piloted with a smaller group prior to rollout to the rest of the region.

*Caitlin Smith, Maddie Haynes, Wittaker Mathot, Javier Aguilar, Sarah Jepson*

**Thank you!**

Tom Vo  
Vo@scag.ca.gov  
213-236-1930  
[www.scag.ca.gov](http://www.scag.ca.gov)



# SoCal Greenprint

Background & Overview

SCAG Planning Department

July 15, 2021

[www.scag.ca.gov](http://www.scag.ca.gov)



1

## What is the SoCal Greenprint?



A tool to help users make data-driven land use and transportation infrastructure decisions and support conservation investments based on the best available scientific data.

### Key Points:

- Uses existing and publicly available data sources
- The tool will provide explanations and guidance on how to use data
- It does not prescribe or require any specific action
- More than 60 organizations have provided feedback
- Does not create any new rules or regulations
- Does not include identifying information about parcels (e.g. APN, no ownership information, etc.)

2

## Greenprints Nationally

Greenprint Resource Hub

3

## What a Greenprint is and is not

WHAT IT IS	WHAT IT IS NOT
A framework to advance the pace and scale of voluntary conservation in a region.	An acquisition map or regulatory plan that puts constraints on land use for any public or private entity.
An assessment that identifies landscape features that are important to residents and communities, like recreation, habitat, water resources, habitat, climate change resiliency or community.	A complete inventory of everything important within an area or new data set.
An analysis that illustrates how conservation values may work in concert with each other and with other values.	A comprehensive solution for natural resource protection.
A resource that helps stakeholders understand shared priorities and facilitates collaboration.	A requirement that stakeholders engage in projects.
A tool that addresses the needs and opportunities for keeping working and agricultural lands viable.	An effort to subvert private property rights.

4

## Infrastructure Goals of the SoCal Greenprint



- Breaks down information silos, helping users to access multi-disciplinary data
- Encourage early consideration of nature in project planning
  - Reduce risks to projects
  - Generate support for projects
- Support strategic mitigation investments
- Foster a sustainable region

5

## Key Users of the SoCal Greenprint



Infrastructure  
Agencies



Conservation  
Practitioners



Community-Based  
Organizations



Developers



Planners  
(Town, City, County, Tribal)

6

6



## Outreach Activities - Overview



- Steering committee includes outside experts
- 60+ advisors/4 interactive workshops
  - Multiple sectors and diverse geographies
  - Public agencies and municipalities
  - Building and development community
- Ongoing conversations and small working groups
- 8 Rapid assessment interviews
- Developed 6 user profiles
- Pre-launch testing
- Case studies

7

7

## Example Greenprint Data Layers



### Agricultural and Working Lands

- FMMP
- Agritourism
- Crop production

### Environmental Justice, Equity, and Inclusion

- DAC, CalEnviroScreen, CoCs
- Public Open Space (CPAD)
- Tree Canopy

### Habitat & Biodiversity

- Endangered Species
- Habitat Connectivity
- High Biodiversity Areas

### Built Environment

- Roads
- Transit stops
- Sewer Lines

### Vulnerabilities & Resilience

- Seismic hazards
- 100 & 500 year flood plains
- High fire-risk

### Water Resources

- 303d Listed Impaired water bodies/streams
- Water quality index
- Groundwater recharge

### Context

- City/County boundaries
- Land Cover
- Land Use

8

8

## Feedback and Review of Potential Data Layers



- Potential data layers and sources available on SCAG's website for review
- Feedback is requested from by August 6, 2021
- Guidance for providing feedback included with layer list as a form
- Additional engagements forthcoming



<https://scag.ca.gov/gis-social-greenprint>

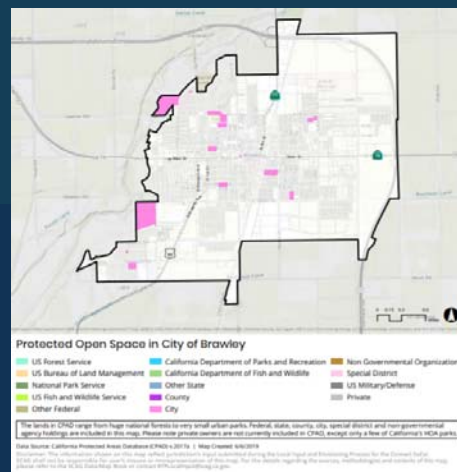
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9

## Interactive Webmap




- Allows users to view any individual data layer on its own
- Users can select what to show by turning on and turning off an individual layer
- Users can adjust transparency based on how important it is to them, and show any layer or combination of layers
- Layers are already downloadable from existing resources
- Customizable and easy to use









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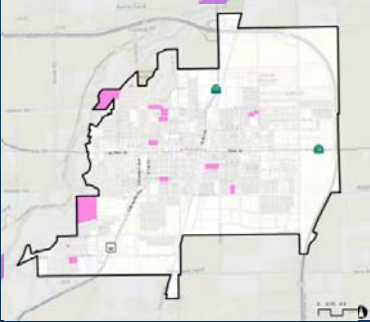
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## Multi-Benefit Asset Mapping



Six thematic asset mapping by theme, supported by multiple datasets

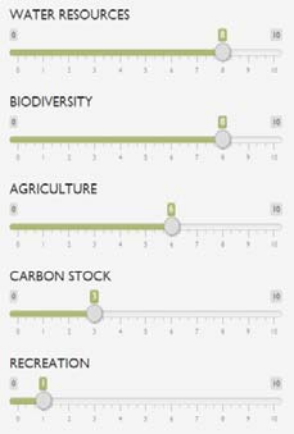
-  Agriculture and Working Lands
-  Habitat and Biodiversity
-  Environmental Justice, Equity, and Inclusion
-  Built environment
-  Vulnerabilities and Resilience
-  Water Resources



Single data layers are combined based on sub-themes for ease of viewing

Here's an example of two related data layers being combined


Users can view the way co-benefits of multiple themes overlap



Enables users to use their unique perspectives to view data

11

## Multi-Benefit Asset Mapping (Con't)



Asset maps **will** be:

- Using existing and available datasets
- User-driven
- Adjustable by transparency between sub-themes
- Clear about which datasets are used and methods utilized to aggregate

Asset maps will **not**:

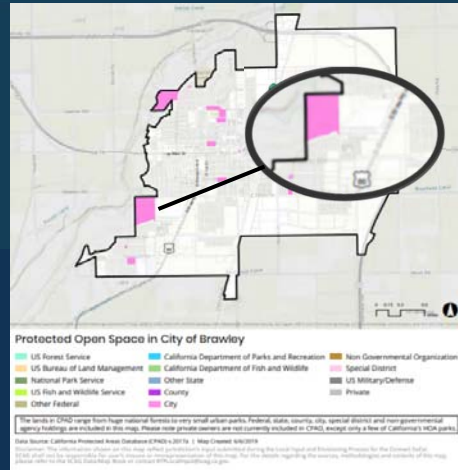
- Be available for download
- Be weighted or scored
- Be used in the Greenprint reporting for an area-of-interest

12

## Reporting for User Defined Areas



- Users will have the option to draw an area or load a shapefile to get more information on a project area with a customized report
- Users can compare two areas
- Data elements are aggregated to a regional coverage; if an underlying dataset is present in the study area, it will be summarized in the report
- There is no rescaling, weighting of underlying data elements, or alteration of native data sources (as developed by local, state, and federal data authors)
- Customized reports and aggregated data layers will be available for download



13

13

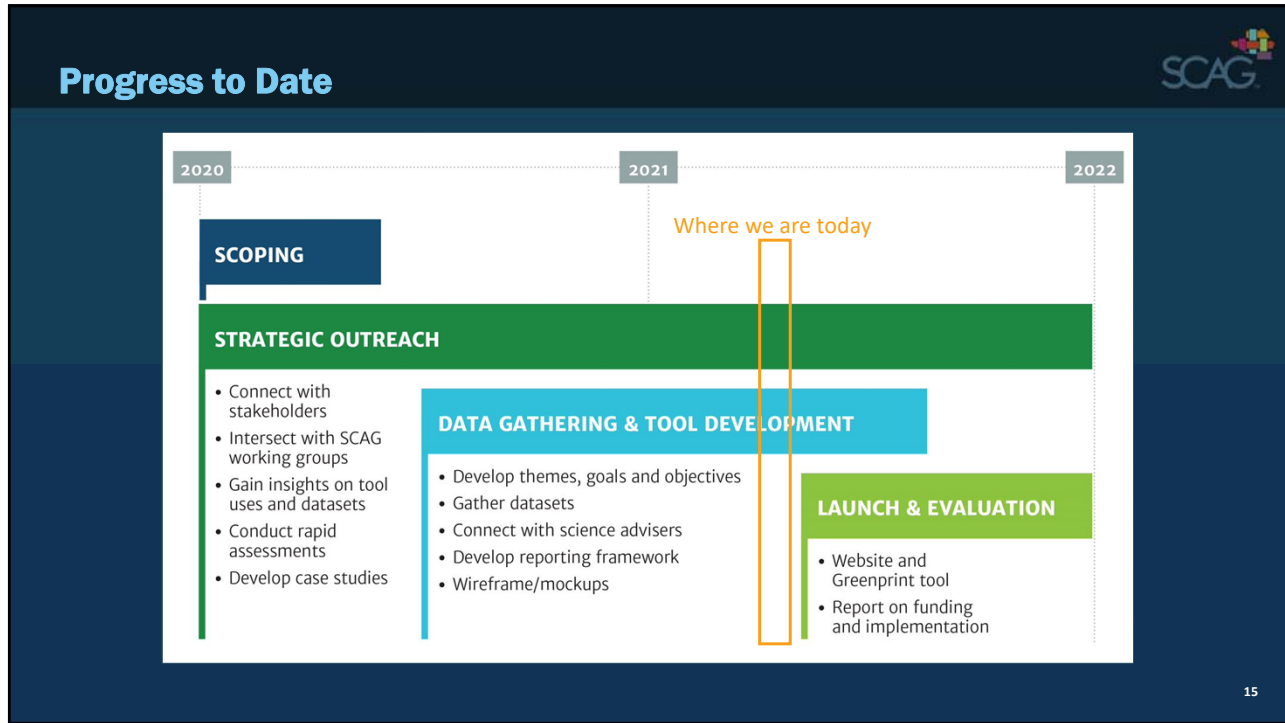
## Overall, the Greenprint will NOT include



- Connect SoCal Constraints layers (absolute or variable)
- Connect SoCal TAZ level maps or data
- Modeling capabilities or scenario planning
- Private data
- Policy prescriptions other than existing local policies (e.g. Williamson Act)
- Hierarchy of data or policies

14

14



15

# Thank you!

[www.scag.ca.gov](http://www.scag.ca.gov)

16

## Priority Growth Areas (PGAs)

Lyle Janicek

Associate Regional Planner, Sustainability

7/15/2021

[www.scag.ca.gov](http://www.scag.ca.gov)



### What are Priority Growth Areas



Priority Growth Areas (PGAs) follow the principles of center focused placemaking and are locations where many Connect SoCal strategies can be fully realized.

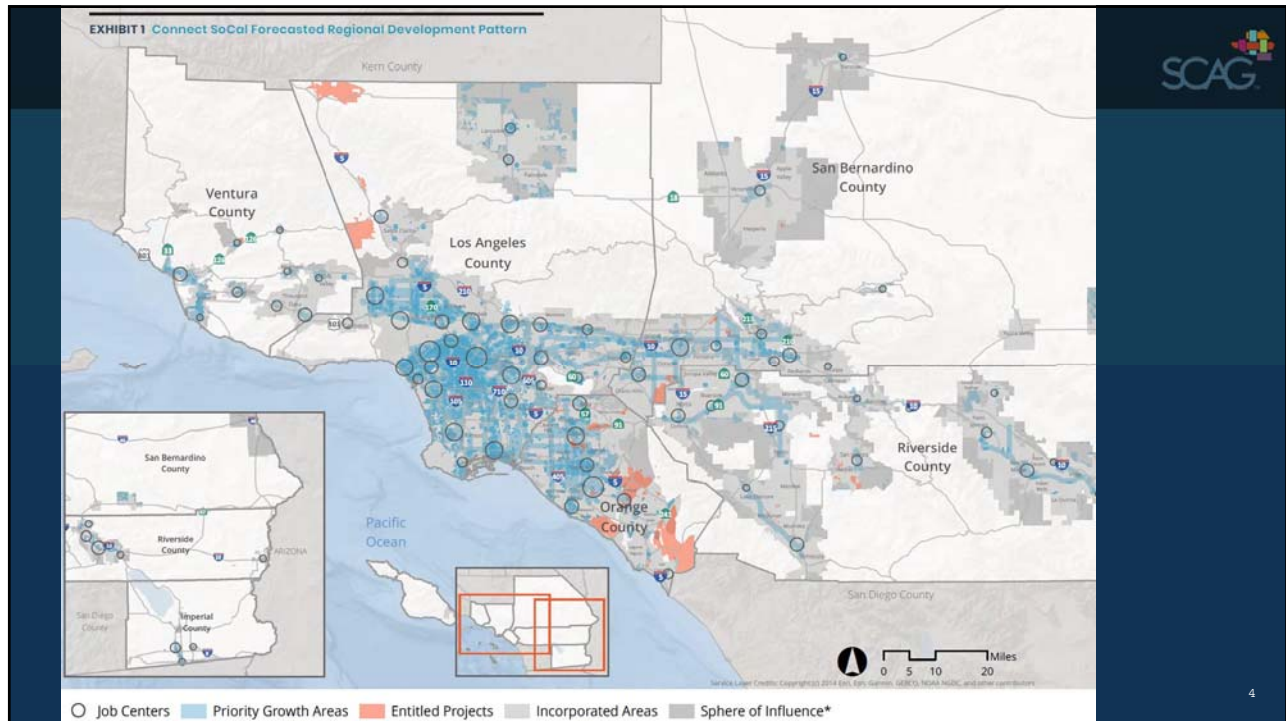
In Connect SoCal (2020), PGAs accounted for only 4% of region's total land area, but account for 64% of forecasted household growth and 74% of forecasted employment growth by 2045.

# 2020 Connect SoCal PGAs



- Transit Priority Areas (TPAs)<sup>1</sup>
- High Quality Transit Areas (HQTAs)
- Livable Corridors<sup>1</sup>
- Neighborhood Mobility Areas (NMAs)
- Job Centers
- Spheres of Influence

1 – Livable Corridors and TPAs are both subsets of HQTAs



## Open Data Portal/HELPR Data

SCAG HELPR 2.0 Housing Element Parcel Tool

Select a Jurisdiction  
City or County (Automatically): All

Filter Parcels

Standard Filters	ADU Filters
<input type="checkbox"/> Vicinal parcels of appropriate size	<input type="checkbox"/>
<input type="checkbox"/> Cover retail/commercial/industrial	<input type="checkbox"/>
<input type="checkbox"/> Public owned land	<input type="checkbox"/>
<input type="checkbox"/> Inside priority growth area, outside consent area	<input type="checkbox"/>
<input type="checkbox"/> Outside environmentally sensitive areas	<input type="checkbox"/>
<input type="checkbox"/> Inside higher opportunity areas	<input type="checkbox"/>
<input type="checkbox"/> Inside environmental justice areas	<input type="checkbox"/>
<input type="checkbox"/> Close proximity to services	<input type="checkbox"/>

<https://m.aps.scag.ca.gov/helpr/>

5

## Next Steps for 2024 Connect SoCal

- Collaborate with Technical Working Group to determine appropriate methodology for future growth
- Review and assess existing trends for strategic growth
- Develop a strategy and outline that supports resilient growth throughout the region
- Continue to review input data, and assess methodology for defining areas that prioritize growth

6



## Any Questions?

Lyle Janicek  
janicek@scag.ca.gov

[www.scag.ca.gov](http://www.scag.ca.gov)



# Connect SoCal Data Sharing Protocol

DRAFT – for discussion purposes

July 15, 2021

[www.scag.ca.gov](http://www.scag.ca.gov)



1

## California Public Records Act Requirements



- California Office of the Attorney General: **“Access to information about the conduct of the public’s business is a fundamental and necessary right of every person in the state”**
- Public records in the **California Public Records Act** are defined as **“any writing containing information relating to the conduct of the public’s business prepared, owned, used, or retained by any state or local agency regardless of physical form or characteristics”**
- Writing is defined as **“any means of recording information including paper, audio tape, video tape, compact disc, DVD, computer diskette, computer hard drive, etc”**
- SCAG has traditionally viewed final data products as public records

California Office of the Attorney General  
National Freedom of Information Coalition 2

## California Public Records Act Requirements (Con't)



- Sections 6254 and 6255 provide exceptions related to SCAG's work:
  - **Preliminary drafts, notes, or interagency or intra-agency memoranda that are not retained by the public agency in the ordinary course of business, if the public interest in withholding those records clearly outweighs the public interest in disclosure**
  - **If withholding records, the agency shall justify that action by demonstrating the record is exempt or that the public interested is served better by not disclosing**
  - **Requests for "curated" & original data that needs processing can be rejected**
    - **If produced and shared, however, this information becomes disclosable**
  - **Data with personal identifiable information (PII)**
- For electronic records, specifically:
  - **Records must be provided in electronic format used by the agency if requested**
  - **Software developed by the government is not disclosable**
  - **Data housed in protected software may still be disclosable**

California Office of the Attorney General

## Public Records Act Practices and Limitations



Permissible Practices	Impermissible Practices
Sharing final datasets & modeling inputs from Connect SoCal	Restricting sharing of Connect SoCal final datasets & modeling inputs to certain types of requestors
Tracking information requests, including data elements and volunteered background information from requestors (affiliation, etc.)	Requiring background information from requestors, or denying access to disclosable records based on requester's intended usage
Receiving requests made orally or in writing; it is recommended that agencies confirm oral requests in writing	Requiring that requests be made in writing, including mandatory use of a "data request form"
Assisting the public in focusing requests, and helping the public to overcome any physical barriers to access	Rejecting requests if not "specific or focused" enough
Providing guidance on data background & use limitations	Requiring user agreements

California Office of the Attorney General

## Public Records Act Timing



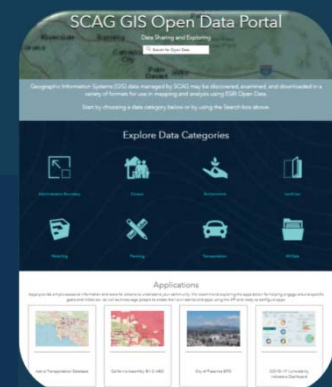
- After a request is made, agencies have 10 days to:
  - **Provide the requested records promptly**
  - **Determine if it will comply with the request**
  - **Notify the requestor of its determination**
- Agencies may extend this period up to 14 days to make a determination:
  - **Communicate with field offices**
  - **Communicate with others who have an interest in the records**
  - **Construct computer reports**
  - **Examine voluminous records**
- Agencies may recover costs when required to:
  - **Print copies (including pro-rata cost of duplication equipment & operation)**
  - **Extract or compile data**
  - **Undertake programming to produce data**

California Office of the Attorney General

## Proposed Data Distribution Protocol for Connect SoCal



- Commonly requested data elements will continue to be posted to SCAG's Open Data Portal
- SCAG will be evaluating additional data items to include
- Any final data elements not posted will be accessible via public records request (e.g. Connect SoCal TAZ-level Growth Projections)
- SCAG will provide guidance and limitations on usage of data, consistent with the previous model data usage agreement, the Connect SoCal Growth Forecast Principles, etc.
- SCAG will monitor requests and usage of data elements, and will regularly report back on requests to the TWG & impacted jurisdictions
- Requests for "curated" and original data will be evaluated for fulfillment based on resources & other considerations



## Connect SoCal Growth Forecast Guiding Principles

### GUIDING PRINCIPLES

The below guiding principles form the basis for developing the plan growth forecast:

1. Connect SoCal will be adopted at the jurisdictional-level, and directly reflects the population, household and employment growth projections that have been reviewed and refined with feedback from local jurisdictions through SCAG's Bottom-Up Local Input and Envisioning Process. The growth forecast maintains these locally informed projected jurisdictional growth totals, meaning future growth is not reallocated from one local jurisdiction to another.
2. Connect SoCal's growth forecast at the Transportation Analysis Zone (TAZ) level is controlled to not exceed the maximum density of local general plans as conveyed by jurisdictions, except in the case of existing entitlements and development agreements. TAZ-level growth projections are utilized by SCAG for regional modeling purposes and are not adopted as part of Connect SoCal nor included as part of the Forecasted Regional Development Pattern. The Forecasted Regional Development Pattern for Connect SoCal reflects the policies and strategies of the Plan and includes existing entitlements and development agreements conveyed by jurisdictions, as depicted in the Connect SoCal Sustainable Communities Technical Report.
3. For the purpose of determining consistency with Connect SoCal for California Environmental Quality Act (CEQA), grants or other opportunities, lead agencies such as local jurisdictions have the sole discretion in determining a local project's consistency; SCAG may also evaluate consistency for grants and other resource opportunities; consistency should be evaluated utilizing the goals and policies of Connect SoCal and its associated Program Environmental Impact Report (PEIR). However, TAZ-level growth projections for households, employment or population reflected in TAZ Maps may not be utilized to determine consistency or inconsistency with Connect SoCal.<sup>1</sup>
4. TAZ-level data or any data at a geography smaller than the jurisdictional-level has been utilized to conduct required modeling analyses and is therefore advisory only and non-binding, given that sub-jurisdictional forecasts are not adopted as part of Connect SoCal. TAZ-level data may be used by jurisdictions in local planning as they deem appropriate, and Connect SoCal does not supersede or otherwise affect local jurisdiction authority or decisions on future development, including entitlements and development agreements. There is no obligation by a jurisdiction to change its land use policies, General Plan, or regulations to be consistent with Connect SoCal.
5. SCAG will maintain communication with agencies that use SCAG's subjurisdictional-level data to ensure that the "advisory and non-binding" nature of the data is appropriately maintained."

# Thank you

Kimberly Clark  
clark@scag.ca.gov



## 2016 RTP/SCS Data Sharing Protocol *(included for reference)*



**Table 1: Adopted Protocol for Tier 1 and Tier 2 Sub-jurisdictional Socioeconomic Data Distribution**

Number	Request Type	Model Data Request Form Required (Yes/No)	Model Data Usage Agreement Required (Yes/No)	Provide Email or Letter on Agency/ Organization's Letterhead (Yes/No)	Provide Approval Letter from Impacted Local Jurisdiction(s) (Yes/No)
1	Requests from funding or regulatory agencies for <b>subjurisdictional data intended for planning work</b> (this would include agencies such as CTCs, FHWA, FTA, EPA, Caltrans, ARB, AQMD, etc.)	Yes	Yes	Yes	No
2	Requests from local jurisdictions of <b>their own jurisdiction's data</b>	Yes	Yes	Yes	No
3	Requests for <b>subjurisdictional data intended for planning work</b> from subregions or local jurisdictions for areas outside their jurisdictional or agency boundary	Yes	Yes	Yes	No
4	Requests from other public agencies (e.g., School Districts, Metropolitan Water District (MWD), Sanitation Districts, and other government or government regulated agencies as deemed appropriate by SCAG) for <b>subjurisdictional data intended for planning work</b>	Yes	Yes	Yes	No
5	Requests from SCAG consultants working on <b>SCAG projects</b>	Yes	Yes	No	No
6	Requests from consultants working on <b>local projects</b> for subregions, local jurisdictions, and other public agencies	Yes	Yes	Yes (from sponsoring agency)	No
7	Requests for subjurisdictional data from research organizations, such as universities, non-profits and policy institutes, for <b>general research purposes</b>	Yes	Yes	Yes (including description of data request)	No
8	Requests from <b>other organizations</b> for non-research purposes	Yes	Yes	Yes	Yes
9	Requests from individuals in the <b>general public</b> (note: SCAG will suggest requestors seek data directly from affected local jurisdictions or subregions before requesting data from SCAG)	Yes	Yes	Yes	Yes

## 2016 RTP/SCS Model and Forecast Data Request Form



- Requests information on:
  - Requesting entity
  - Organization type
  - Data elements needed
  - Purpose of request & intended usage of data
  - Is this a SCAG Project?
  - Data years needed
  - Preferred method of delivery (hard drive, excel, TransCAD)

**Southern California Association of Governments  
MODEL AND FORECAST DATA REQUEST FORM**

This Model and Forecast Data Request Form is between the Requester and the Southern California Association of Governments ("SCAG"). The purpose of this Request Form is to provide a mechanism for SCAG's Modeling Department to log and maintain the data requests that are received for the specified areas.

Please fill in this form in its entirety and return form to Cheryl Leising at [leising@scag.ca.gov](mailto:leising@scag.ca.gov) and Hao Cheng at [chengh@scag.ca.gov](mailto:chengh@scag.ca.gov). Pending approval, the request will then be given a timeframe for completion and forwarded to the appropriate staff member who will fulfill the data requested. Please note that in-house projects and tasks take priority; adjust time for your request accordingly. NOTE: For consultants or those working with cities and/or member agencies, please attach a written request on City letterhead. Please send the attachment with your request as a PDF file. Please allow a minimum of 45 days lead time for requests that need special processing or further discussion on information that is requested. The timeframe MAY be shortened based upon in-house work and if the request contains "off-the-shelf" information that is readily available.

Today's Date:

Date request needed by (please allow a min. of 45 day lead time):

Company/Agency/Consultant Name:

Is this a SCAG project?

Requester Name:

Email:

Phone:

*(included for reference)*

## 2016 RTP/SCS Model Data Usage Agreement



- Requests information on:
  - Requesting entity
  - Organization type
  - Data elements needed
  - Purpose of request & intended usage of data
- Conveys restrictions on:
  - Access & use
  - Citation requirements
  - Disclaimer of liability and hold harmless agreement

*(included for reference)*

**SCAG**  
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS

**Model Data Usage Agreement**  
(Approved March 2, 2017; Amended June 22, 2020)

Based on guidance from the 2020-2045 Regional Transportation Plan and Sustainable Communities Strategy (Connect SoCal), this Model Data Usage Agreement ("Agreement") is entered into by and between the Southern California Association of Governments, hereinafter referred to as "SCAG," and Requesting Agency/Consultant – [Click to Enter Text](#), a/an **Organization Type - Choose an Item** (under SCAG's Data Distribution Protocol, dated May 2020), hereinafter referred to as "Requester," collectively referred to as the "Parties" to ensure the "advisory and non-binding" nature of SCAG's subjurisdictional data is appropriately maintained. Please refer to the Connect SoCal Demographics and Growth Forecast Technical Report for additional information.

*Note: The "Requester" is the party who will be working directly with the provided subjurisdictional data/modeling information and will conduct the actual data analysis.*

**RECITALS**

Whereas, SCAG is providing technical assistance to the Requester in the development of subjurisdictional data or data analysis for the "[Name of Project - Click to Enter Text](#)" project, hereinafter referred to as "the Project"; and

Whereas, the Requester seeks use of certain subregional data and modeling information from SCAG in order to conduct its work for the Project; and

Whereas, the Requester falls under the category of "**Organization Type - Choose an Item**" under SCAG's Data Distribution Protocol, dated May 2020.

Whereas, SCAG is willing to provide the Requester use of certain SCAG subregional data and modeling information, as further specified below, based upon the terms and conditions of this Agreement.

Now, therefore, the Parties agree as follows:

**I. GENERAL PROVISIONS**

1. The above Recitals are incorporated as part of this Agreement by this reference.
2. This Agreement, when signed by SCAG and the Requester, shall serve as authorization for the Requester to obtain and use certain subregional data and modeling information from SCAG as further detailed herein.
3. No alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by both Parties.
4. This Agreement is not assignable, in whole or in part, to any third party.

**6. Connect SoCal 2024 growth forecasting and local jurisdiction input: Preliminary stages and target dates**

Kevin Kane, PhD. SCAG Demographer & Senior Regional Planner, Department of Sustainability

**Growth Forecasting**

This is a preliminary version of the key milestones in the growth forecasting process for the 2024 RTP/SCS. This process will generally mirror the 2020 RTP/SCS process described at [https://scaq.ca.gov/sites/main/files/file-attachments/0903fconnectsocal\\_demographics-and-growth-forecast.pdf](https://scaq.ca.gov/sites/main/files/file-attachments/0903fconnectsocal_demographics-and-growth-forecast.pdf). Differences include the addition of a “regional uncertainties” exercise in order to better assess a range of growth trajectories earlier in the plan development cycle and the development of regional & small area framing documents prior to the release of those forecasts in order to improve transparency and clarity regarding the role of SCAG’s forecasts.

Target Date	Name	Details
July (& Oct) 2021	Demographic Panel of Experts Meeting(s)	Meeting(s) to review outside projections, demographic and economic trends and assumptions.
Fall 2021	Regional Growth Forecast Framework	
Fall 2021	Regional Growth Uncertainties Exercise	Assessment of a range of demographic and economic input assumptions will yield regional high, medium, and low employment, population, and household growth trajectories for exploration and discussion.
Jan 2022	Preliminary Regional Growth Forecast	Region-level employment, population, and household totals for the 2024 plan horizon.
Winter 2022	Small Area Growth Forecast Framework	
May 2022 – October 2022	Preliminary Small Area Growth Forecast complete and (full) Local Input Process kickoff	Preliminary jurisdiction & TAZ-level employment, population, and household totals for the 2024 plan horizon available for local review.
Mid-2023	Draft Growth Vision	Integration of regional strategies with policy growth forecast for the draft plan.
2024	Final Regional Growth Vision	Final plan growth vision.

**Local jurisdiction input**

This is a preliminary version of the key stages envisioned for engaging local jurisdictions in two-way data and information exchange for the 2024 RTP/SCS. This process will generally mirror the 2020 RTP/SCS process described at <https://scaq.ca.gov/local-input-process-towns-cities-and-counties> and is expected to include similar data elements as found in the Data/Map Books used previously. This process is beginning later than the previous plan cycle for a number of reasons including delays in the 2020 Census, better understanding COVID-19 impacts on long-range growth, providing more time to integrate local planning such as 6<sup>th</sup> cycle housing element updates into the regional growth forecasts, and in order to better utilize SCAG’s Regional Data Platform (RDP) for communication and data exchange.

- Stage 1: Regional Data Platform (RDP) development and piloting; Local Information Services Team (LIST) launched – early 2021
- Stage 2: Housing element site inventory & draft jurisdiction housing growth goals survey – October 2021
- Stage 3: Local Input Web data review platform launched; trainings – January to April 2022
- Stage 4: Preliminary growth forecast data available for review and meetings with local jurisdictions – May to October 2022
- Stage 5: Continued outreach on growth forecast and SCS vision – early 2023



# Subregional SCS Framework and Guidelines

[www.scag.ca.gov](http://www.scag.ca.gov)



## What is the Subregional SCS Framework and Guidelines?



- Provision of SB 375 allows Subregional Council of Governments in SCAG region to prepare their own Sustainable Communities Strategy
- Framework and Guidelines describes the expectations for both SCAG and the Subregion
- Option is available to any subregional council of governments

## Overview of SCAG's Guidelines

- Intent of guidelines is to offer flexibility to subregions but ensure SCAG can meet its statutory responsibilities
- SCAG will not issue subregional GHG or other performance targets
- Subregional SCS must contain all required elements per SB 375 and will need to coordinate with respective CTC
- SCAG will incorporate the subregional SCS into the regional SCS (pg. 11)
- SCAG will develop an MOU with each subregion that delegates to provide further detail and provide conflict resolution process

## Highlight of Changes from 2020 Framework and Guidelines

- Clarified eligibility for “subregional council of governments” instead of “subregions” per statute (pg. 3)
- Added encouragement to participate in growth forecasting process (pg. 5-6)
- Addition of related additional requirements per CARB’s updated SCS Guidelines (pg. 6-7)
- Removed discussion of RHNA, added RHNA related statutory requirement (pg. 5)
- Updated Data and Tools sections (pg. 9, 12-13)

## Suggested Edits to Current Guidelines

Add clarity on “regional performance objectives specified by the SCAG Regional Council” (pg.11)

Clarify that two-way data sharing is between City-SCAG not SCAG-public (pg. 13)

Retain discussion of RHNA but clarify applicability each cycle

## Next Steps

**Now:** SCAG staff will review proposed edits and apply as feasible

**September 2:** SCAG staff will prepare guidelines for approval at Regional Council meeting

*SCAG staff anticipate including a red-lined version*

**October 29:** Deadline for subregional agencies to communicate intent to SCAG

[www.scag.ca.gov](http://www.scag.ca.gov)



Southern California Association of Governments (SCAG)  
*Revised for use in developing the 2024 Regional Transportation Plan/Sustainable  
Communities Strategy (2024 RTP/SCS)*

**SUBREGIONAL SUSTAINABLE COMMUNITIES  
STRATEGY FRAMEWORK AND GUIDELINES**

**Table of Contents**

I. INTRODUCTION ..... 2

II. ELIGIBILITY AND PARTICIPATION ..... 3

III. FRAMEWORK..... 3

    A. SCAG’s Goals ..... 3

    B. Flexibility, Targets and Adoption ..... 4

    C. Outreach Effort and Principles..... 4

    D. Communication and Coordination ..... 4

    E. Planning Concepts..... 4

IV. GUIDELINES..... 5

    A. Subregion Role and Responsibilities..... 5

    B. County Transportation Commissions’ Roles and Responsibilities..... 10

    C. SCAG Roles and Responsibilities ..... 10

    D. Milestones/Schedule ..... 13

APPENDIX A..... 14

## I. INTRODUCTION

Codified in 2009, California’s Sustainable Communities and Climate Protection Act (referred to as “SB 375”), calls for the integration of transportation, land use, and housing planning, while also establishing the reduction of greenhouse gas (GHG) emissions as part of the regional planning process. SCAG, working with the individual County Transportation Commissions (CTCs) and the subregions within the SCAG region, is responsible for complying with SB 375 in the Southern California region. Success in this endeavor is dependent on the collaboration of SCAG with a range of public and private partners throughout the region.

Briefly summarized here, SB 375 requires SCAG as the Metropolitan Planning Organization (MPO) to:

- Submit to the State every four years, a Sustainable Communities Strategy (SCS) as part of the Regional Transportation Plan (RTP). The SCS, when integrated with the transportation network, and other transportation measures and policies, will reduce GHG emissions from automobiles and light trucks to achieve the State-determined regional GHG emission reduction target, if it is feasible to do so.
- Prepare an Alternative Planning Strategy (APS) that is not part of the RTP if the SCS is unable to meet the regional GHG emission reduction target.
- Adopt a public participation process involving all required stakeholders.

Unique to the SCAG region, SB 375 provides that “a subregional council of governments and the county transportation commission may work together to propose the sustainable communities strategy and an alternative planning strategy, if one is prepared pursuant to subparagraph (I), for that subregional area.” Govt. Code §65080(b)(2)(D).

In addition, SB 375 provides that SCAG “may adopt a framework for a subregional sustainable communities strategy or a subregional alternative planning strategy to address the intraregional land use, transportation, economic, air quality, and climate policy relationships.” *Id.*

Finally, SB 375 requires SCAG to “develop overall guidelines, create public participation plan pursuant to subparagraph (F), ensure coordination, resolve conflicts, make sure that the overall plan complies with applicable legal requirements, and adopt the plan for the region.” *Id.*

The intent of this Subregional Sustainable Communities Strategy Framework and Guidelines (also referred to herein as the “Framework and Guidelines” or the “Subregional Framework and Guidelines”) is to facilitate a subregion’s option to develop the SCS (and potential APS) as described in SB 375. The Framework and Guidelines offers SCAG’s subregional agencies the highest degree of autonomy, flexibility and responsibility in developing a program and set of implementation strategies for their subregional areas while still achieving the goals of the regional SCS.

Subregional strategies should address the issues, concerns, and future vision of the region’s collective jurisdictions with the input of the widest range of stakeholders. This Framework and Guidelines establishes guidance to assist in the development of

subregional strategies and sets forth SCAG's role in facilitating and supporting the subregional effort with data, tools, and other assistance. Note that the Framework and Guidelines herein may be administratively amended, at any time, subject to changes in applicable federal and/or state planning laws, regulations, and guidance.

## II. ELIGIBILITY AND PARTICIPATION

The option to develop a subregional SCS (and APS, as appropriate) is available to any subregional council of governments.

CTCs play an important and necessary role in the development of a subregional SCS. Any subregion that chooses to develop a subregional strategy will need to work closely with the respective CTC in its subregional area in order to identify and integrate transportation projects and policies. Beyond working with CTCs, SCAG encourages partnership efforts in the development of subregional strategies, including partnerships between and among subregions.

**For the 2024 Regional Transportation Plan/Sustainable Communities Strategy (2024 RTP/SCS) cycle, subregional agencies should indicate to SCAG, in writing by Friday, October 29, 2021, if they intend to exercise their option to develop their own subregional SCS (see other major milestones for the 2024 RTP/SCS attached here as Appendix A.)**

Subregions that choose to develop an SCS for their subregional area shall do so in a manner consistent with the most current version of this Framework and Guidelines. The subregion's decision to prepare the subregional SCS for their area must be communicated through formal action of the subregional agency's governing board or the agency's designee. Subsequent to receipt of any subregion's decision to develop and adopt an SCS, SCAG and the subregion will develop a Memorandum of Understanding (MOU). The final executed version of the MOU shall be consistent with the Framework and Guidelines, and may be amended during the process, if necessary.

## III. FRAMEWORK

The Framework portion of this document covers regional objectives and policy considerations and provides general direction to the subregions in preparing a subregional SCS (and APS, as appropriate).

### A. SCAG's Goals

In complying with SB 375, SCAG's goals include:

- Update the 2024 RTP/SCS with an emphasis on documenting the region's progress in implementing the strategies and actions described in the 2020-2045 SCS, Connect SoCal.
- Demonstrate continued reasonable progress in implementing the 2020 RTP/SCS.
- Prepare an SCS that will achieve the targets set for cars and light trucks as determined by the California Resources Board (CARB).

- Fully integrate SCAG’s planning processes for transportation, growth, land use, housing, and the environment.
- Seek areas of cooperation with the subregions, CTCs, and any local jurisdictions that go beyond the procedural statutory requirements, but that also result in regional plans and strategies that achieve co-benefits.
- Build trust by providing an interactive, participatory and collaborative process for all stakeholders. Provide for the robust participation of local jurisdictions, subregions and CTCs in the development of the SCAG regional SCS and facilitate the development of any subregional SCSs and/or APSs.
- Ensure that the SCS adopted by SCAG and submitted to CARB is a reflection of the region’s collective growth strategy and the shared vision for the future.
- Develop strategies that incorporate and are respectful of local and subregional priorities, plans, and projects.
- Incorporate the goals and policies reflected in regional resolutions adopted by the SCAG Regional Council including but not limited to Resolution 20-623-2<sup>1</sup> declaring racism a public health crisis, Resolution 21-628-1 on Climate Change Action<sup>2</sup> and Resolution 21-629-2<sup>3</sup> to bridge the digital divide in underserved communities.

## B. Flexibility, Targets and Adoption

Subregions may develop an appropriate strategy to address the region’s GHG goals, the intent of SB 375, and the GHG targets for the SCAG region as established by CARB. Subregions may employ any combination of land use policy change, transportation policy, and transportation investment, within the specific parameters described in the Guidelines.

SCAG will not issue subregional GHG or any other subregional performance targets.

## C. Outreach Effort and Principles

In preparing a subregional SCS, subregions are required to conduct an open and participatory process that allows for public and stakeholder input. A more detailed discussion on outreach effort and principles can be found in Section IV.A(3).

## D. Communication and Coordination

Subregions developing their own SCS are strongly encouraged to maintain regular communication with SCAG staff, the respective CTC, their jurisdictions and other stakeholders, and other subregions if necessary, to review issues as they arise and to assure close coordination. Mechanisms for ongoing communication should be established in the early phases of strategy development.

## E. Planning Concepts

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<sup>1</sup> [https://scag.ca.gov/sites/main/files/file-attachments/rcresolution206232\\_0.pdf?1605039926](https://scag.ca.gov/sites/main/files/file-attachments/rcresolution206232_0.pdf?1605039926)

<sup>2</sup> <https://scag.ca.gov/sites/main/files/file-attachments/rc010721resolution21-628-1.pdf?1610072923>

<sup>3</sup> <https://scag.ca.gov/sites/main/files/file-attachments/rc020421fullpacket.pdf?1612231563>



SCAG, its subregions, and member cities have established a successful track record on a range of land use and transportation planning approaches up through and including planning approaches that are reflected in Connect SoCal, the 2020-2045 RTP/SCS. The subregional SCS should consider the 2020-2045 RTP/SCS and build off from its policies and concepts, including emphasis on the Core Vision and Key Connections. Statutory requirements are further discussed in Section IV.A(1).

## IV. GUIDELINES

These Guidelines describe specific parameters for the subregional SCS/APS effort under SB 375, including process, deliverables, data, documentation, and timelines. As described above, the Guidelines are created to ensure that the SCAG region can successfully incorporate strategies developed by the subregions into the regional SCS, and that the region can comply with its own SB 375 requirements. Failure to proceed in a manner consistent with the Guidelines could result in SCAG not accepting a subregion's submitted strategy.

### A. Subregion Role and Responsibilities

#### (1) Subregional Sustainable Communities Strategy

Subregions may choose to exercise their option under SB 375 to develop and adopt a subregional Sustainable Communities Strategy. This subregional strategy must contain all required elements, and follow all procedures, as described in SB 375 and outlined below:

- (i) identify the general location of uses, residential densities, and building intensities within the subregion;
  - (ii) identify areas within the subregion sufficient to house all the population of the sub-region, including all economic segments of the population, over the course of the planning period of the RTP taking into account net migration into the region, population growth, household formation and employment growth;
  - (iii) identify areas within the subregion sufficient to house an eight-year projection of the regional housing need for the subregion pursuant to Section 65584;
  - (iv) identify a transportation network to service the transportation needs of the subregion;
  - (v) gather and consider the best practically available scientific information regarding resource areas and farmland in the subregion as defined in subdivisions (a) and (b) of Section 65080.01;
  - (vi) consider the state housing goals specified in Sections 65580 and 65581;
  - (vii) set forth a forecasted development pattern for the subregion, which, when integrated with the transportation network, and other transportation measures and policies, will reduce the greenhouse gas emissions from automobiles and light trucks to achieve, if there is a feasible way to do so, the greenhouse gas emission reduction targets approved by the CARB; and
  - (viii) allow the RTP to comply with Section 176 of the federal Clean Air Act (42 U.S.C. Sec. 7506).
- [Government Code §65080(b)(2)(B).]

SCAG strongly encourages that the subregion participates and partners in SCAG's growth

forecasting process to ensure that any recommendations or insights are included in the development process. In preparing the subregional SCS, the subregion and respective CTC should consider feasible strategies, including local land use policies, transportation infrastructure investment (e.g., transportation projects), and other transportation policies such as Transportation Demand Management (TDM) (which includes pricing), and Transportation System Management (TSM) strategies. Subregions need not constrain land use strategies considered for the SCS to current General Plans. In other words, the adopted strategy need not be fully consistent with currently adopted local General Plans. If the land use assumptions included in the final subregional SCS depart from General Plans, it is recommended that subregions include a finding as part of their adoption action (e.g., adopting resolution) that concludes that the land uses are feasible and may be implemented. Technological measures may be included if they can be demonstrated to exceed measures captured in other state and federal requirements (e.g., AB 32 Scoping Plan).

Subregions will need to provide additional information to facilitate the CARB Strategy-Based SCS Evaluation Process as documented in the CARB Final Sustainable Communities Strategy Program and Evaluation Guidelines<sup>4</sup>. The strategy-based SCS Evaluation Process consists of the following four components, Tracking Implementation (SB 150), Policy Commitments, Incremental Progress, and Equity. These four components evaluate RTP/SCS strategies that are classified into four broad categories:

1. Land use and housing;
2. Transportation;
3. Local/regional pricing; and
4. New mobility

The information and data necessary for this evaluation includes land use and transportation system characteristics as well as performance indicators.

Land Use Characteristics include:

- Residential densities (total regional and by place type or sub-regional geography as defined by the MPO)
- Employment densities (total regional and by place type or sub-regional geography as defined by the MPO)
- Total regional housing product type/mix (single-family/multi-family)
- Total regional developed acres
- Total housing units and employment within ½ mile of a High-Quality Transit Station

Transportation System Characteristics include:

- Lane miles of roadway by functional classification
- Transit headways
- Transit operation miles
- Transit service hours
- Class I, II, and IV bike lane miles

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<sup>4</sup> <https://ww2.arb.ca.gov/sites/default/files/2019-11/Final%20SCS%20Program%20and%20Evaluation%20Guidelines%20Report.pdf>

- Average toll rate/congestion pricing per unit

Performance Indicators include:

- Household vehicle ownership
- Mode split
- Average travel time by mode
- Transit ridership
- Average vehicle trip length
- Seat utilization or Load factor
- Household VMT (external-external [XX] trips excluded)
- per capita VMT (external-external [XX] trips excluded)

## (2) Subregional Alternative Planning Strategy

SB 375 provides regions and subregions the option to further develop an APS, according to the procedures and requirements described in SB 375, if the combined regional SCS does not meet GHG emission reduction targets established by CARB. In the event that the regional SCS does not meet the targets, subregions will be involved in the formation of an APS - either through their development of a subregional APS or through their participation and contribution in SCAG's regional APS. SCAG will not require subregions to complete a subregional APS; delegated subregions opting to complete their own subregional APS must first complete a subregional SCS. Written records reflecting the feedback between local jurisdictions and delegated subregions on the development of a regional or subregional APS must also be submitted to SCAG.

Subregions are encouraged to focus their efforts on feasible measures that can be included in an SCS. Any timing or submission requirements for a subregional APS will be determined based on further discussions. If a subregion opts to prepare an APS, the content of a subregional APS should be consistent with state requirements (See Government Code §65080(b)(2)(I)), as follows:

- (i) Shall identify the principal impediments to achieving the subregional sustainable communities strategy.
- (ii) May include an alternative development pattern for the subregion pursuant to subparagraphs (B) to (G), inclusive.
- (iii) Shall describe how the greenhouse gas emission reduction targets would be achieved by the alternative planning strategy, and why the development pattern, measures, and policies in the alternative planning strategy are the most practicable choices for achievement of the greenhouse gas emission reduction targets.
- (iv) An alternative development pattern set forth in the alternative planning strategy shall comply with Part 450 of Title 23 of, and Part 93 of Title 40 of, the Code of Federal Regulations, except to the extent that compliance will prevent achievement of the regional greenhouse gas emission reduction targets approved by the CARB.
- (v) For purposes of the California Environmental Quality Act (Division 13 (commencing with Section 21000) of the Public Resources Code), an alternative planning strategy shall not constitute a land use plan, policy, or regulation, and the inconsistency of a project with an alternative planning strategy shall not be a consideration in determining whether

a project may have an environmental effect.

### (3) Subregional SCS Outreach

SCAG shall fulfill all of the statutory outreach requirements under SB 375 for the regional SCS/APS, which will include outreach regarding any subregional SCS/APS. SCAG's adopted Public Participation Plan incorporates the outreach requirements of SB 375, integrated with the outreach process for the 2024 RTP/SCS development. See Section IV.C(2) below for more information on SCAG's public participation plan.

In preparing a subregional SCS, subregions are strongly encouraged to design and adopt their own outreach processes that mirror the requirements imposed on the region under SB 375. Subregional outreach processes should reinforce the regional goal of full and open participation, and engagement of the broadest possible range of stakeholders.

Subregions that elect to prepare their own SCS are encouraged to present their subregional SCS (and potential APS), in coordination with SCAG, at all meetings, workshops and hearings held by SCAG in their respective counties. Additionally, the subregions are encouraged to either provide SCAG with their mailing lists so that public notices and outreach materials may also be posted and sent out by SCAG; or coordinate with SCAG to distribute notices and outreach materials to the subregions' stakeholders. Additional outreach may be performed by subregions.

### (4) Subregional SCS Approval

The governing board of the subregional agency and the respective CTC board (at their option) shall approve the subregional SCS prior to submission to SCAG. SCAG recommends that the governing board of the subregion adopt a resolution approving the subregional SCS with a finding that the land use strategies included in the subregional SCS are feasible and based upon consultation with the local jurisdictions in the respective subregion. Subregions should consult with their legal counsel as to compliance with the California Environmental Quality Act (CEQA). In SCAG's view, the subregional SCS (and potential APS) is not a "project" for the purposes of CEQA because the RTP, which will include the regional SCS, is the actual "project" that will be reviewed by SCAG under state law for environmental impacts pursuant to CEQA. As such, the regional SCS, which will include the subregional SCSs, will undergo a thorough CEQA review. Nevertheless, subregions approving subregional SCSs should consider issuing a notice of exemption under CEQA to notify the public of their "no project" determination and/or to invoke the "common sense" exemption pursuant to CEQA Guidelines § 15061(b)(3).

In accordance with SB 375, subregions are strongly encouraged to work in partnership with the CTC in their area. SCAG can facilitate these arrangements if needed.

### (5) Incorporation of the Subregional SCS into the Regional SCS

The regional RTP/SCS, of which the SCS is a component, is required to be internally consistent. Therefore, for transportation investments included in a subregional SCS to be valid, they must also be included in the corresponding RTP/SCS. As such, subregions will need to collaborate with the respective CTC in their area to coordinate the subregional SCS with future transportation investments.

SCAG shall include the subregional SCS for the subregion in the regional SCS to the extent consistent with SB 375 and federal law and approve the sustainable subregional alternative planning strategy, if one is prepared for that subregional area to the extent it is consistent with SB 375.

More information on SCAG's subregional SCS incorporation process is included below in Section IV.C(4)

#### (6) Data Standards

Subregions will be required to submit subregional SCSs in GIS-based format, with data elements identified in Section IV.A(1) broken down to the small area level (in a fashion specified by SCAG for each element). This will enable SCAG to better integrate subregional submissions with the regional SCS and will allow subregions to prepare alternative scenarios if they so choose. SCAG will provide tools, and necessary training, free of charge for subregions and jurisdictions. Tools and training related to SCAG's Regional Data Platform (RDP) are available and additional functionality will be released through early 2022. See Section IV.C(10) below for more information.

SCAG will distribute data to subregions and local jurisdictions via the region-wide local agency data validation process for the 2024 RTP/SCS. More information data can be found below in Section IV.C(9).

#### (7) Documentation

Subregions are expected to maintain full and complete records related to the development of the subregional SCS, and to use the most recent adopted local general plans and other locally approved planning documents. Subregions should also keep records of all electronic, in-person, and written feedback from local jurisdictions on the development of the socioeconomic estimates and projections for the SCS and the base land use data<sup>5</sup> required for consideration in the development of the subregional SCS (and APS as appropriate).

#### (8) Implementation Monitoring

Delegated subregions for the 2024 Plan will be required to provide progress reporting on the implementation of policies included in their subregional SCS. SCAG will, likewise, monitor implementation of the regional SCS. This information will assist SCAG in preparing future plan updates and is consistent with SCAG's intended approach for developing the 2024 RTP/SCS, which will emphasize progress reporting, monitoring and updating. The intent is for SCAG to ensure that progress and success for our subregions and local jurisdictions are documented and recognized.

To monitor implementation, subregions should track subsequent actions on policies and strategies included in the subregional SCS. Monitoring should be focused on policy actions taken (e.g., General Plan updates) or subsequent planning work performed.

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<sup>5</sup> "Base land use data" consists of local general plan land use, zoning, existing land use, planned entitlements, recent demolitions, and other resource areas datasets required for consideration in the development of an SCS as described in section 65080 of SB 375.

While subregions have substantial discretion within the overall goal of ascertaining progress of adopted plan policies and strategies, reporting should be done at least prior to the end of the four-year planning period. SCAG staff plans to conduct implementation monitoring for the region, including a local implementation survey, and will lead the effort for any necessary data-intensive exercise and technical analysis, with assistance from subregions and local jurisdictions.

Further guidance on implementation monitoring including required format and timing will be developed through further discussion and documented in MOUs with delegated subregions.

#### (9) Timing

An overview schedule of the major milestones of the 2024 RTP/SCS process is attached herein as Appendix A, which may be further delineated or adjusted in MOUs with delegated subregions.

### B. County Transportation Commissions' Roles and Responsibilities

Subregions that develop a subregional SCS will need to work closely with the CTCs in their respective subregional area in order to coordinate and integrate transportation projects and policies as part of the subregional SCS, as it is the role of CTCs to make transportation planning decisions. As discussed above (under "Subregional Sustainable Communities Strategy"), any transportation projects identified in the subregional SCS must also be included in the associated RTP/SCS in order to be considered as a feasible strategy. SCAG can help to facilitate communication between subregions and CTCs.

### C. SCAG Roles and Responsibilities

SCAG's roles in supporting the subregional SCS development process are as follows:

#### (1) Preparing and adopting the Framework and Guidelines

SCAG will update and have the SCAG Regional Council adopt these Framework and Guidelines each RTP/SCS cycle in order to assure regional consistency and the region's compliance with law.

#### (2) Public Participation Plan

SCAG will assist the subregions by developing, adopting and implementing a regional Public Participation Plan and outreach process with stakeholders. This process includes consultation with congestion management agencies, transportation agencies, and transportation commissions; as well as holding public workshops and hearings. SCAG will also conduct informational meetings in each county within the region for local elected officials (members of the board of supervisors and city councils), to present the draft SCS (and APS, as appropriate) and solicit and consider input and recommendations.

#### (3) Technical Methodology

As required by SB 375, prior to the start of the public participation process, SCAG will prepare and submit to CARB a description of the technical methodology it intends to use to estimate GHG emissions from the SCS. SCAG will work with CARB on this methodology until CARB concludes that the technical methodology operates accurately. Estimated GHG emissions will be analyzed at the regional level.

#### (4) Incorporation, Modification and Conflict Resolution

SCAG will accept and incorporate the subregional SCS, unless (a) it does not comply with SB 375 (Government Code Section 65080 et seq.), (b) it does not comply with federal law, or (c) it does not comply with SCAG's Subregional Framework and Guidelines.

For incorporation in the regional RTP/SCS, SCAG may adjust subregional growth totals, jurisdictional totals, and land use data at the sub-jurisdictional level for a number of reasons including compliance with statutory requirements, adherence with SCAG's expertly-informed growth projections and growth forecast process, and ensuring that SCAG's regional SCS meets the regional GHG targets or other regional performance objectives specified by the SCAG Regional Council. Performance considerations other than the GHG targets that may prompt adjustments to subregional land uses would be specified by SCAG prior to regional public workshops.

The intent of this provision is to allow SCAG to maintain flexibility in preparing the regional SCS to meet federal and/or state requirements. In the event that SCAG alters the location and distribution of population, household, and employment growth for delegated subregions, SCAG staff will work directly with delegated subregions to review any proposed revisions through a collaborative and iterative process. Feedback will be sought to gauge the availability of growth capacity at the local level, and adjustments will be made to the highest extent possible based on input received, with consideration of the goal to fulfill SCAG's regional performance and GHG emission reduction targets. Delegated subregions will need to seek input from local jurisdictions on any potential revision to sub-jurisdictional growth estimates and projections, and will need to keep records of all feedback on these figures or the base land use data for the 2024 RTP/SCS. Delegated subregions, however, will not be required to revise their SCS to reflect any such revisions.

The development of a subregional SCS does not exempt the subregion from other regional GHG emission reduction strategies not directly related to land use included in the regional SCS. All regional strategies needed to meet the regional target will be subject to adoption by the SCAG Regional Council.

The draft regional SCS, including incorporated subregional SCSs, is subject to a public review process, potential revisions, and final adoption by the SCAG Regional Council.

SCAG will develop an MOU with each subregion to define the process and timeline whereby subregions would submit a draft subregional SCS to SCAG for review and comments, so that any inconsistencies may be identified and resolved early in the process. SCAG will also establish a conflict resolution process as part of the MOU between SCAG and the subregion to address the potential modification or adjustments that may occur during the incorporation process. This process will be the

same for all delegated subregions.

#### (5) Modeling

SCAG currently uses an Activity Based Model and CARB's EMFAC model for emissions purposes. SCAG will compile and disseminate performance information on the preliminary regional SCS and its components in order to facilitate regional dialogue.

#### (6) Regional Performance Measures.

As discussed above (Section IV.C.(4)), SCAG may make adjustments to subregional land use data in order to meet regional GHG targets or to achieve other performance objectives. The process for finalizing formal Performance Measures will inform any potential adjustments. Below is a general description of the process for developing and finalizing formal Performance Measures.

SCAG is in the process of compiling two complete lists of performance measures and monitoring: one will be used for evaluating regional-level scenarios in support of development of the 2024 RTP/SCS. The other will be used for monitoring implementation of the 2020 RTP/SCS. The monitoring of implementation may include, for example, tracking local general plan updates, specific plan adoption in Transit Priority Areas, active transportation plan adoption, and housing element compliance. Building on the foundation of the performance measures developed in support of the 2020 RTP/SCS, the 2024 RTP/SCS performance measures will also include the set of federally designated MAP-21 performance measures, as well as any other updates adopted by the SCAG Regional Council. Most update related activities for the 2024 RTP/SCS performance measures will be expected to occur between January 2022 and May 2023. These updates will be addressed through discussions with SCAG regional stakeholders, and the SCAG Policy Committees.

#### (7) Adoption/Submission to State

After the incorporation of subregional strategies, the Regional Council will finalize and adopt the 2024 RTP/SCS. SCAG will submit the regional SCS, including all subregional SCSs, to CARB for review as required in SB 375. The subregion will provide relevant documentation to support SCAG in complying with the CARB Evaluation Guidelines, referenced above in section IV.A(1).

#### (8) Funding

Funding for subregional SCS/APS activities is not currently available. Any specific parameters for future funding are speculative. While there is no potential future funding at this time, it is advisable for subregions to track and record their expenses and activities associated with these efforts.

#### (9) Data

SCAG will distribute data to subregions and local jurisdictions for review and input for the 2024 RTP/SCS. This involves a bottom-up approach for developing the base land use data, growth forecast, scenarios, and integrates SCAG's other efforts (e.g., plan



implementation, performance monitoring) to improve local jurisdictions' competitiveness for funding that helps implement the RTP/SCS.

SCAG will work with delegated subregions during the MOU process, and prior to the local review and input process, to outline responsibilities for generating and refining the datasets required for consideration under SB 375. It is anticipated that the delegated subregion will take a leadership role in both outreach to local jurisdictions and data development, with SCAG offering support as needed.

#### (10) Tools

SCAG is in the process of building a comprehensive Regional Data Platform (RDP) to standardize regionally significant datasets, provide opportunities for local partners to update their data in real-time, and draw insights from local trends. The platform will also feature a data-driven collaboration hub for local jurisdictions to engage with stakeholders for individual projects, such as local and regional land use planning, active transportation planning, greenhouse gas reduction strategies, and development impact assessments. The RDP is intended as a resource for general plan updates as well as two-way data sharing with SCAG.

Beginning in Fall 2020, the RDP began engaging with ten pilot jurisdictions to fine tune workflows, products, and data requirements and made ESRI licenses available to all local jurisdictions. The first major tool, the Housing Element Parcel Tool (HELPR) was released in fall 2021. More tools will continue to be rolled out through 2021 and into 2022. SCAG's Local Information Services Team (LIST) aims to train local jurisdictions in the use of RDP tools and provide data guidance.

The use of SCAG tools is not mandatory and is advisory only. Use of the tools is at the discretion of subregions and local jurisdictions. SCAG will consider providing guidance and training on additional tools based on further discussions with subregional partners.

#### (11) Resources and technical assistance

SCAG will assist the subregions by making available technical tools as described above. SCAG staff can participate in subregional workshops, meetings, and other processes at the request of the subregion, and pending funding and availability. Further, SCAG will prepare materials for its own process in developing the regional SCS and will make these materials available to subregions.

### D. Milestones/Schedule

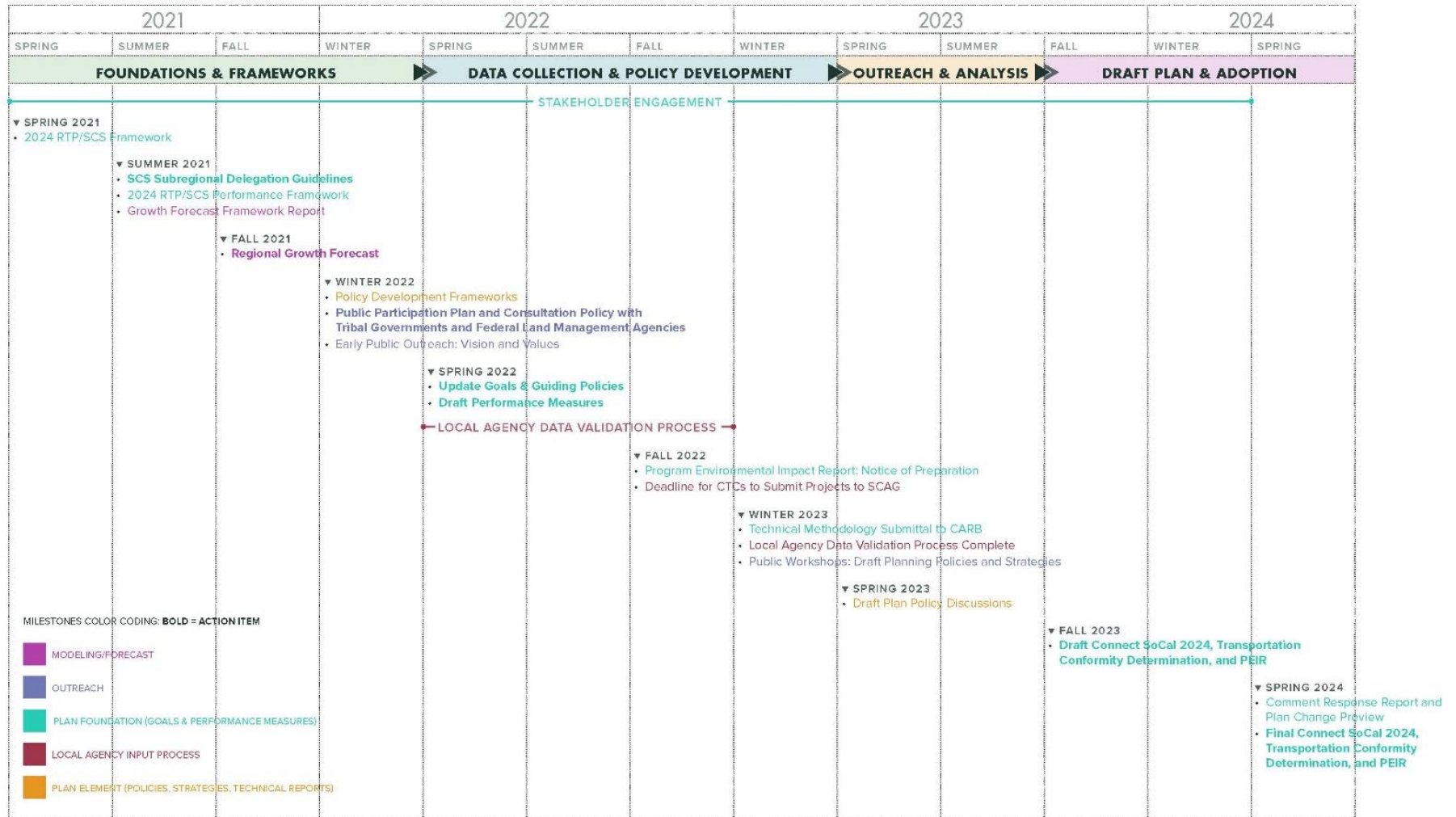
- Deadline for subregions to communicate intent to prepare a subregional SCS – September 30, 2021
- Subregional SCS development – Fall 2021 through early 2023
- Draft dataset delivery to SCAG – Summer 2022
- Final dataset delivery to SCAG – Fall 2022
- Draft subregional SCS to be incorporated into regional SCS – Winter 2023
- Release Draft 2024 RTP/SCS for public review – Fall 2023
- Regional Council adopts 2024 RTP/SCS – Spring 2024

For more context on the process schedule and milestones, refer to the attached Appendix A. Further detailed milestones will be incorporated into the MOU between SCAG and the subregion.

# APPENDIX A



## 2024 RTP/SCS PRELIMINARY MILESTONES



## **8. SCAG Technical Working Group for regional planning and growth agenda outlook**

### **Upcoming scheduled meetings**

- July 15, 2021
- September 16, 2021
- November 18, 2021
- January 20, 2022
- March 17, 2022
- May 19, 2022
- July 21, 2022

### **Upcoming Agenda Items 12 Month Outlook**

*Note, items below are not organized in sequential order*

- Growth forecasting
  - Forecast frameworks
  - Regional growth uncertainties exercise
  - Preliminary forecasts
- Regional Data Platform
  - Updates on tools and trainings
  - Local input web integration
  - Local Information Services Team (LIST)
- Growth Vision
  - Local input schedule and updates
  - Data map book preview
  - Priority growth and conservation area revisions
  - Scenario methodology and development
- SCAG Greenprint updates
- Performance Measures
  - 2024 RTP/SCS Framework
  - Draft Performance Measures
- CARB SB 150, SCS Implementation Report
  - Data Request and Draft Submission
- SCAG Local Profiles
- Housing: Data/Production Tracking
- Legislative Updates: Relevant impacts to SCAG's technical work