



SAN LUIS OBISPO COUNTY

**HOUSING & INFRASTRUCTURE**  
**REGIONAL FRAMEWORK**

The San Luis Obispo Council of Governments (SLOCOG) prepared the Housing & Infrastructure Regional Framework for the County of San Luis Obispo to fulfill the terms of the Senate Bill 2 grant program. SLOCOG would like to thank those who helped develop this strategic planning tool between 2022-2023.

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### The Signatories of the 2020 Regional Housing Compact

County Board of Supervisors, 7 City Councils, and the SLOCOG Board



The SLOCOG Board of Directors adopted the Housing & Infrastructure Regional Framework on August 2, 2023.

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## **SUMMARY**

The Housing & Infrastructure Regional Framework, formerly the Regional Housing and Infrastructure Plan (HIP), is a planning toolkit collaboratively created by the seven Cities, County of San Luis Obispo, and SLOCOG in response to the region's growing housing and infrastructure shortage. The Framework inventories infrastructure barriers and priorities for housing, identifies available grant funding options to implement infrastructure needs, and develops foundational information for the future 2027 Regional Housing Needs Assessment (RHNA).

In 2018, the County of San Luis Obispo recognized the need to work regionally in solving the critical shortage of infrastructure resources and housing attainability in San Luis Obispo County. This challenge is larger than any one jurisdiction can solve alone. The Framework in no way removes land use authority from local jurisdictions; rather, it reflects each community's relevant, long-term plans in one regional tool to inform our region's future efforts in addressing the collective economic and social challenges associated with lack of housing supply.

In January 2019, the County Board of Supervisors approved the kickoff of this effort. Since inception, the Framework has been a phased approach with the goals of regional collaboration, strategic action planning, and aligning land use planning documents which were all agreed upon with the unanimous approval of the 2020 Regional Compact.

### *The Regional Compact (February-April 2020)*

The County, seven cities, and San Luis Obispo Council of Governments (SLOCOG) approved the first major milestone of the phased regional strategy - the San Luis Obispo Countywide Regional Compact. The Regional Compact is an aspirational document that sets the tone and goals for future recommended plans and actions among the local agencies. It establishes a united regional framework to unlock the potential to develop an adequate supply of housing and resilient infrastructure that supports our economic prosperity. It recognizes that people, water, transportation, connectivity, and housing form the foundation of the San Luis Obispo Region's healthy, livable communities and thriving economic opportunity. In signing the Compact, agencies agreed to develop their "first Regional Infrastructure and Housing Strategic Action Plan." As stated in the 2020 Compact, the six "goals will underpin the future Regional Infrastructure and Housing Strategic Action Plan, create compatibility among the eight local agencies Housing Elements, and drive future recommendation for collaborative actions."

*Housing Element Alignment (December 2020)*

The County and the seven Cities were each required to update their jurisdiction's Housing Elements to reflect how local communities are planning for the State's 6th Cycle Regional Housing Needs Allocations through 2028. The Housing Elements were submitted to the Housing and Community Development (HCD) in December 2020. As part of the Housing Element update process, the regional approach section was developed to showcase the ongoing commitment of each agency to the Framework collaboration. This section presents a regional vision and policies focused specifically on fostering regional collaboration to plan and develop housing and supportive infrastructure. It was the first time all eight jurisdictions included a regional approach chapter in their required housing elements.

*Regional Housing and Infrastructure Regional Framework (August 2023)*

Put on hold during the Pandemic, the Framework was revived in June 2022 with the establishment of a Memorandum of Understanding between the County of San Luis Obispo and SLOCOG. SLOCOG became the project manager of the effort. With Senate Bill 2 funding sunseting in September 2023, the Regional Framework began moving at an accelerated pace. The 2023 regional toolkit is comprised of seven components listed in Figure 1: Framework Toolkit. These components intertwine and build upon one another.

**Figure 1: Framework Toolkit**

| <b>Components</b>             | <b>Informs</b>   |
|-------------------------------|--|
| Data and Project Inventory    | Infrastructure barriers to housing   |
| Housing Efficiency Analysis   | Housing Efficient Areas  |
| Mapping Tool                  | Living strategic analysis tool that show how housing and infrastructure interrelate      |
| Affordable-by-Design Study    | Menu of possible policies to increase housing attainability                              |
| Funding Strategies Assessment | Funding the region could pursue for projects   |
| Housing Highlights            | Communication tool: Understanding the need for housing, affordability, and opportunities |
| Prioritization Considerations | Further refinement of the prioritization process and data                                |

Agencies that supply or operate local infrastructure facilities identified 440 water, wastewater, and transportation infrastructure projects in the Framework project inventory. Of those, 18% (80 projects) were located within Housing Efficient Areas and identified as barriers to housing. About one quarter of the identified projects are water related and the remaining are transportation improvements. The estimated total cost for all eighty projects is over one billion dollars. This information can be seen via the interactive [Mapping Tool](#).

BKF Engineering's Funding Strategies Assessment evaluates the disparity between the cost estimate for each identified project and the anticipated funding that could be obtained

through various financial mechanisms. The Funding Analysis involved several steps: a funding requirement determination, an evaluation of potential funding sources, an estimation of potential grant funding, and a funding gap calculation. With current grant funding sources, our region can optimistically be awarded around \$91 million dollars depending on a local jurisdiction's interest in pursuing and successful award for the potential funding identified for that project. That leaves a funding gap of about \$924 million dollars for infrastructure projects needed to support new housing development. More detail is available in Appendix B: Draft Funding Strategies Assessment.

Our region also wanted to look at the concept of Affordable-by-Design (ABD) and evaluate housing affordability characteristics. The intention of ECONorthwest's ABD study was to identify if certain units (without financial assistance or deed restrictions) could be considered affordable as either low- or moderate-income units and if so, how to incentivize ABD development. The ABD Study collected rental and for-sale housing data, interviewed local housing developers, created a unit feasibility analysis, collected case study examples, and identified policies that could incentivize ABD units. The ABD Study revealed that the rental market may be able to produce ABD housing in at least some parts of the region and is likely within a range where regulatory changes could make a difference. However, a longer approach is needed on the for-sale side since the gap between market sales prices and the target sales prices for moderate-income households is likely too large to overcome through design and regulatory measures alone. More detail is available in Appendix A: Draft Affordable-by-Design Study.

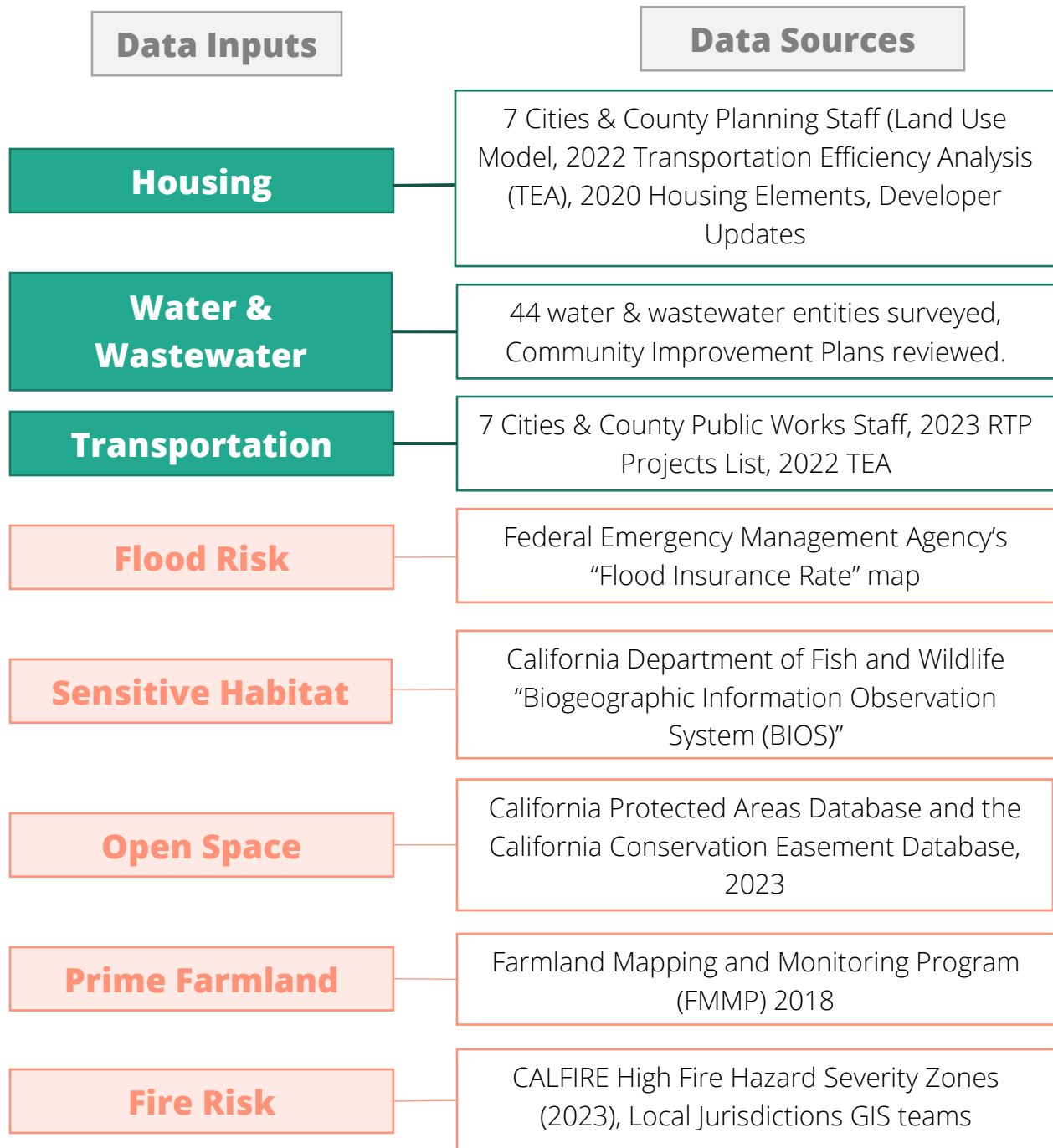
There have been bright spots of success: thoughtful projects developed with engagement from the community, progress in streamlining processes, and allowing new types of housing. Collaboration has increased between the cities and County as well as between public and private partners. Through these efforts, projects are shifting to balance community character and ranges of affordability in positive ways. Created by REACH and Koble Collaborative, the Housing Highlights document provides a quick look at what is driving the effort, features recent housing successes, and the opportunities ahead. More detail is available in Appendix C: Draft Housing Highlights.

## **DATA AND PROJECT INVENTORY**

The Framework analyzes the transportation, water, and wastewater infrastructure barriers to housing development. Figure 2 provides the source details on the data used in the analysis.



**Figure 2: Data Inventory Sources**



*Housing*

Proposed residential developments within the seven cities and unincorporated county were collected from planning staff in 2021. This data includes specific plans, proposed residential and mixed-use projects projected for to be built between now and 2045, in alignment with

existing community plans. Residential development that has been completed or near completion was removed from the analysis.

### *Water & Wastewater*

In early January 2023, SLOCOG staff contacted the 44 water and wastewater agencies found in the 2021 Regional Water Infrastructure Resiliency Plan. Five initial questions were asked to the agencies:

1. Is your agency fulfilling its water/wastewater service demand?
2. Do you have the capacity to serve additional housing units?
3. Is your agency experiencing any infrastructure limitations or does it have any infrastructure needs?
4. Have they been planned for?
5. Is there a cost estimate for these improvements?

The data collected includes the findings of the 2021 Regional Water Infrastructure Resiliency Plan, agency responses, local capital improvement project lists, and information from the County of San Luis Obispo's Water Team. Water and wastewater service districts were used as water boundaries. Detailed GIS based data from these agencies is limited and water capacity data will be informed by the County's Master Water Report Update. However, infrastructure projects, estimated costs, and timing were all collected. In 2023, 45 water and wastewater projects were collected from the agencies.

### *Transportation*

Transportation infrastructure was studied in the Transportation Efficiency Analysis (TEA) which the SLOCOG Board approved in April 2022. The TEA identified transportation barriers to housing production which resulted in a list of transportation projects that were prioritized as either land use necessitated or land use beneficial. Land use necessitated projects were transportation projects required for new housing development. These projects are considered TEA priority projects because they are needed to accelerate housing development. Land use beneficial projects are transportation projects that are not required for housing development but improve the transportation efficiency of an area. Of the 350+ transportation investments contained within the 2023 Regional Transportation Plan (RTP); 64 transportation investments were identified as TEA projects. In 2023, the San Luis Obispo Regional Transit Authority (RTA) provided details on transit projects and additional improvements needed to best serve additional housing development. The transportation infrastructure list was further refined in the analysis and prioritized differently.

### *Bonus Layers*

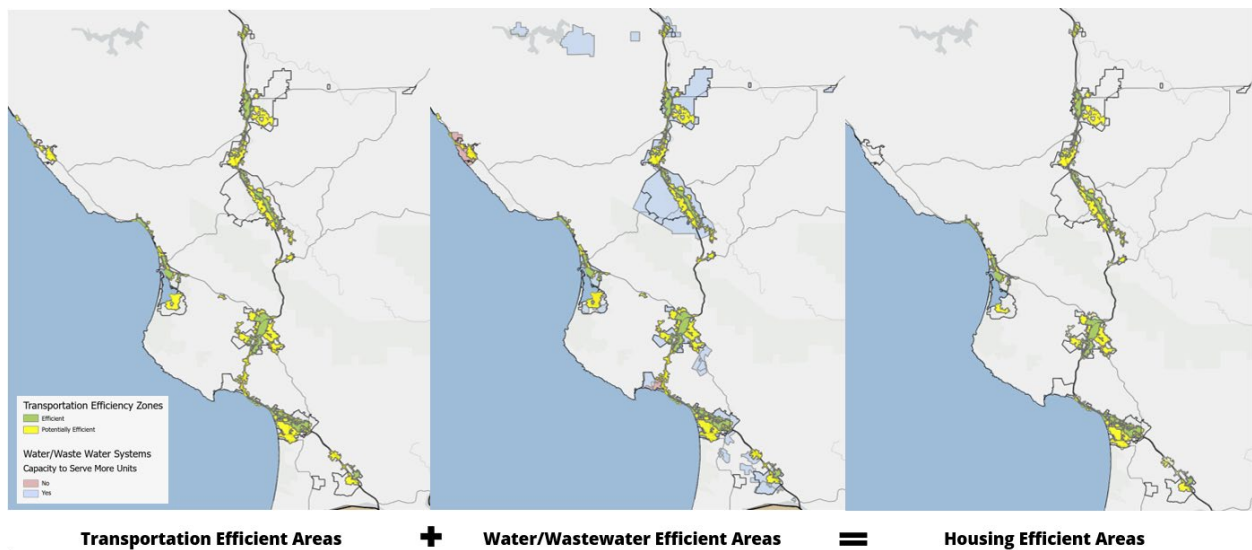
The Framework analysis provides the data that connects infrastructure and housing on a regional scale for the first time. The 2023 effort is also the first phase of the analysis. When planning for housing, land conditions are carefully considered. To provide a fuller picture, flood

hazard, sensitive habitat, open space, prime farmland, and fire hazard severity data were included as additional reference information. These were not used to remove infrastructure projects from the list but are there to provide additional context.

## HOUSING EFFICIENCY ANALYSIS

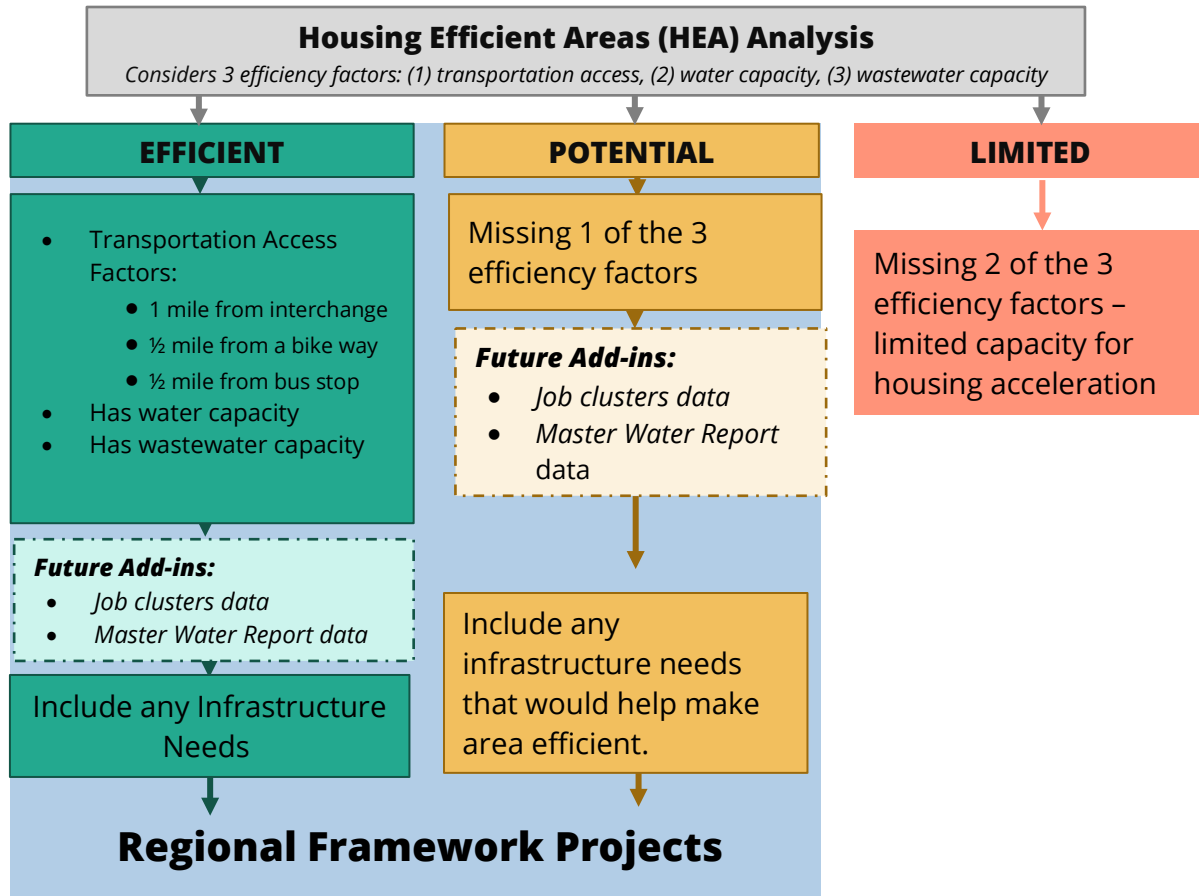
The Housing Infrastructure Analysis looks at three efficiency factors: transportation access, water capacity, and wastewater capacity. By combining the three efficiency factors, housing efficient areas were identified. This is graphically represented in Figure 3: Mapping Process. Any infrastructure projects located in the “efficient” or “potential” mapped areas moved on to the prioritization phase. All areas and projects that were considered “limited” were removed from further analysis. The Framework in no way removes land use authority from local jurisdictions or changes zoning of an area. The Communities of Shandon, Avila Beach, and Cambria were removed from analysis since they did not meet the efficiency criteria.

**Figure 3: Mapping Process**



There were 440 infrastructure projects collected as part of the data inventory. Of those, 18% (80 projects) were located within a Housing Efficient Area. The 80 projects moved on to the prioritization phase. The flow of the analysis can be seen in Figure 4: Analysis Process.

**Figure 4: Analysis Process**



The Framework list contains eighty infrastructure projects with an estimated total funding gap of more than one billion dollars in need. As seen in Figure 5: List Summary, one quarter of the needed infrastructure investments are water-related (supply & wastewater).

**Figure 5: List Summary**

|                       | Estimate (\$ millions) | Projects  |
|-----------------------|------------------------|-----------|
| <b>Total Estimate</b> | <b>\$ 1,015</b>        | <b>80</b> |
| <b>WATER</b>          | \$ 396                 | 21        |
| <b>TRANSPORTATION</b> | \$ 618                 | 59        |

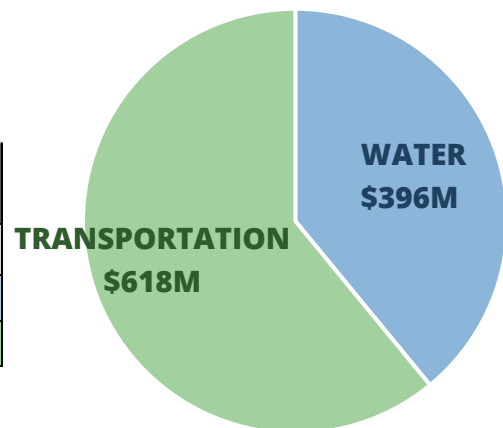


Figure 5: Projects by Community breaks down the total number of projects and the total estimated investment needed by the community. Among the eighty total projects, three are listed as multijurisdictional projects including Central Coast Blue, the Regional Transit Authority Cashless Fare System Conversion, and the North County Transit Charging Facility. In Figure 6, these are listed as a separate row and are not included individually in the "Framework Projects" column for each community. However, multijurisdictional project costs are included in the community's total investment needed.

**Figure 6: Framework Projects by Community**

| <b>Community</b>            | <b>Framework Projects</b> | <b>Total Estimated Investment Needed (\$ millions)</b> |
|-----------------------------|---------------------------|--|
| <i>Multijurisdictional*</i> | 3                         | \$ 95  |
| <b>Arroyo Grande</b>        | 1                         | \$ 136   |
| <b>Atascadero</b>           | 4                         | \$ 112   |
| <b>Grover Beach</b>         | 4                         | \$ 54  |
| <b>Morro Bay</b>            | 1                         | \$ 22  |
| <b>Paso Robles</b>          | 17                        | \$ 184   |
| <b>Pismo Beach</b>          |                           | \$ 18  |
| <b>San Luis Obispo</b>      | 26                        | \$ 267   |
| <b>County</b>               | 22                        | \$ 172   |
| Cayucos                     | 2                         | \$ 8   |
| Los Osos                    | 3                         | \$ 15  |
| Nipomo                      | 6                         | \$ 34  |
| Oceano                      | 1                         | \$ 4   |
| San Miguel                  | 1                         | \$ 41  |
| Santa Margarita             | 1                         | \$ 2   |
| Templeton                   | 7                         | \$ 66  |
| <b>Cal Poly</b>             | 2                         | \$ 50  |
| <b>Total Projects</b>       | <b>80</b>                 | <b>\$ 1,015</b>  |

Ninety-nine percent of the region's population lives in four out of five subregions: North County, Central County, North Coast, and South County. The North and Central subregions have most of the Framework projects and combined make up an estimated 81% of the proposed new housing units in the entire region.

- North Coast (Los Osos, Morro Bay, and Cayucos)
  - North County (Santa Margarita, Atascadero, Templeton, Paso Robles, San Miguel)
  - South County (Pismo Beach, Grover Beach, Arroyo Grande, Oceano, Nipomo)
  - Central County (San Luis Obispo)
- \*The Communities of Shandon, Avila Beach, and Cambria were removed from analysis since they did not meet the efficiency criteria.

**Figure 7: Framework Projects by Subregion**

| Subregion      | Total Proposed Dwelling Units | Framework Projects | Total Estimated Investment Needed (\$ millions) |
|----------------|-------------------------------|--------------------|---|
| North County   | 6,540                         | 31                 | \$ 405  |
| Central County | 6,171                         | 29                 | \$ 319  |
| North Coast    | 127                           | 6                  | \$ 45   |
| South County   | 2,876                         | 13                 | \$ 246  |
|                |                               |                    | \$ 1,015  |

The complete list can be viewed in Appendix D: 2023 Regional Framework Projects.

## MAPPING TOOL

The [Housing & Infrastructure Mapping Tool](#) is an interactive, region-wide web app that supplements the Regional Framework. It was created to illustrate the Framework's geographical analysis and support communication and collaboration. The web app includes three pages.

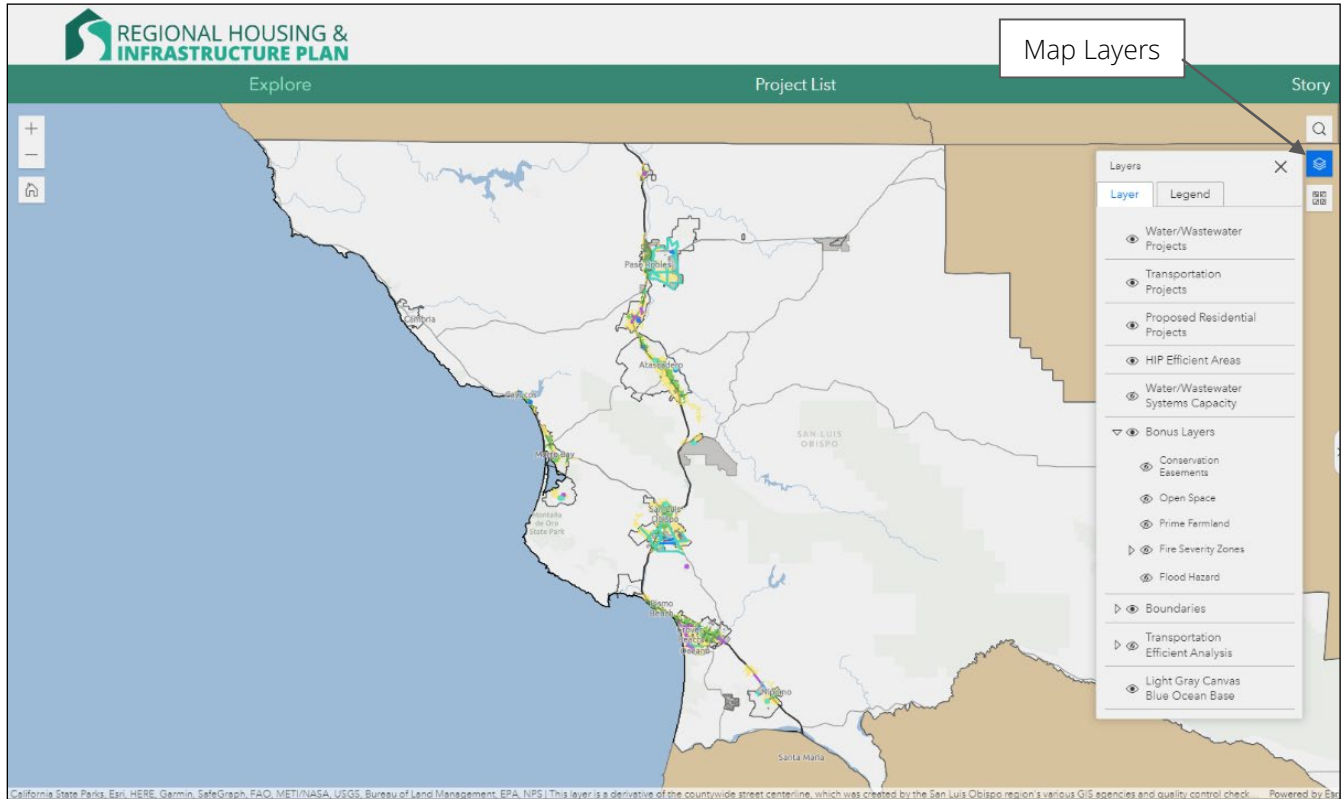
On the Explore page (shown below), users can pan/zoom around the Region to view and click on infrastructure projects. Transportation projects are symbolized with lines and open circles, and water/wastewater projects are symbolized with points. Bonus layers may be added to the map by clicking the map layers icon and opening the "bonus layers" group. Residential projects, symbolized by grey polygons, may also be selected to learn more information.

On the Project List page, users can sort infrastructure projects by water and transportation. Both lists are collapsible. When a project is selected on the list, the map will zoom to the project. The user may also click on the project on the map to view a pop-up showing the name, description, and estimated cost.

On the "Story" page of the tool, users may scroll through the Framework Storymap. It includes a quick summary of the Regional Framework, the four-step geographic analysis, a timeline, and

a link to the 2023 Regional Framework. This tool was created using ArcGIS Experience Builder, ArcGIS Pro, ArcGIS Online, and ArcGIS Storymaps.

**Figure 8: Housing & Infrastructure Mapping Tool**



## AFFORDABLE-BY-DESIGN STUDY

Our region also wanted to look at the concept of Affordable-by-Design (ABD) and evaluate housing affordability characteristics. The intention of ECONorthwest’s ABD study was to see if certain units (without financial assistance or deed restrictions) could be considered affordable as either low- or moderate-income units and if so, how to incentivize ABD development. The ABD Study collected rental and for-sale housing data, interviewed local housing developers, created a unit feasibility analysis, collected case study examples, and identified polices that could incentivize ABD units. The ABD Study revealed that the rental market may be able to produce ABD housing in at least some parts of the County and is likely within a range where regulatory changes could make a difference. However, a longer approach is needed on the for-sale side since the gap between market sales prices and the target sales prices for moderate-income households is likely too large to overcome through design and regulatory measures alone. More detail is available in Appendix A: Draft Affordable-by-Design Study.

## **FUNDING STRATEGIES ASSESSMENT**

BKF Engineering’s Funding Strategies Assessment evaluates the disparity between the cost estimate for each Framework identified project and the anticipated funding that could be obtained through various financial mechanisms. The Funding Analysis involved several steps: a funding requirement determination, an evaluation of potential funding sources, an estimation of potential grant funding, and a funding gap calculation. With current grant funding sources, our region can optimistically be awarded around \$91 million dollars depending on a local jurisdiction’s interest in pursuing funding for that project. That leaves a funding gap of about \$924 million dollars for infrastructure projects needed for housing development. More detail is available in Appendix B: Draft Funding Strategies Assessment.

## **HOUSING HIGHLIGHTS**

There have been bright spots of success: thoughtful projects developed with engagement from the community, progress in streamlining processes and allowing new types of housing. There has been increased collaboration between cities as well as between public and private partners. Through these efforts, projects are shifting to balance community character and ranges of affordability. Created by REACH and Koble Collaborative, the Housing Highlights document provides a quick look at what is driving the effort, some highlights of progress, and the opportunities ahead. More detail is available in Appendix C: Draft Housing Highlights.

## **STAKEHOLDER ENGAGEMENT STRATEGY**

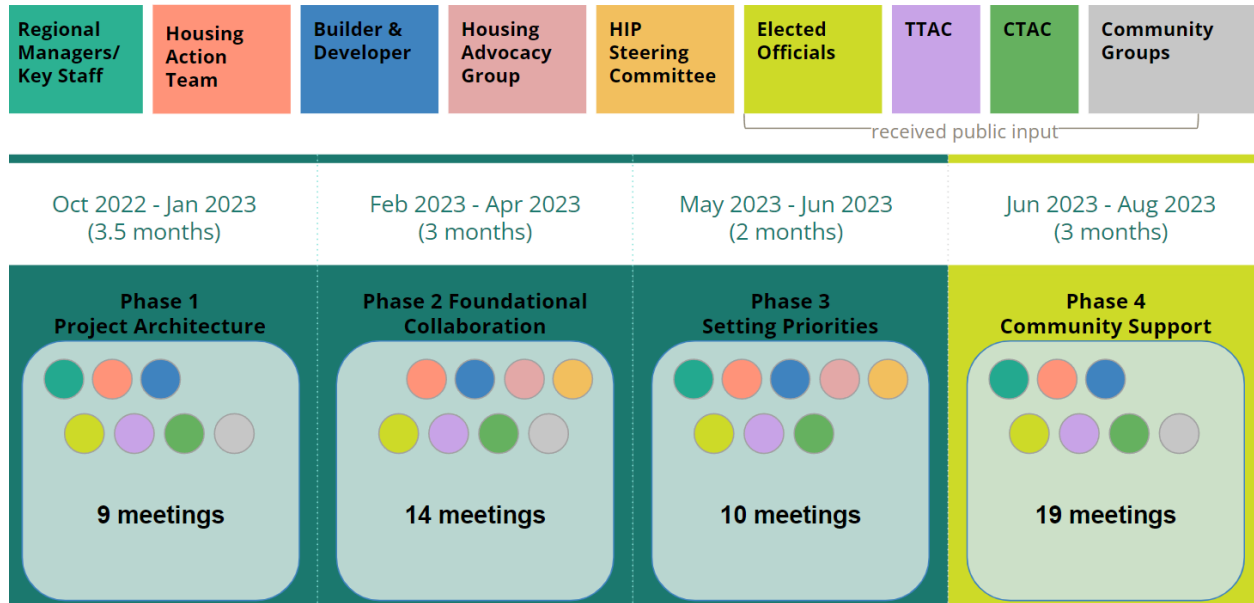
The Framework engagement strategy established four outreach objectives:

- Foster ongoing collaboration and buy-in among private and public stakeholders.
- Remind government/elected officials of the Regional Compact and the motives behind it to lay groundwork for their commitment to the 2023 Regional Framework.
- Build public sentiment in support of solutions and regional planning efforts related to the Framework.
- Support effective coordination with and communication among SLOCOG, consultants and the Comprehensive Economic Development Strategy (CEDS) teams.

The San Luis Obispo region laid out aspirational goals for the future of housing and infrastructure in its Regional Compact, but those can only be achieved through the decisions and actions of organizations and stakeholders. The stakeholder meetings were designed to create space for honest conversations about what each organization can and needs to do to realize those goals. Between June 2022-August 2023, sixty stakeholder meetings/presentations were conducted for the Framework. Half of those engagement meetings were done between May 2023-August 2023 in the final four months of the effort. Figure 9 depicts the timeline and amount of engagement conducted during the 2023 Regional Framework.



**Figure 9: Stakeholder Engagement**



The following list provides key stakeholder groups engaged – hundreds of individuals participated during the Framework development process in during the sixty meetings/presentations:

*Regional Managers/ Key Staff:* A key driving force behind developing the Framework has been regional leadership, including the seven City Managers, County Administrative Officer, SLOCOG Executive Director and key directors from their organizations.

*Building & Development Cluster:* Leaders in the building and development industry that convene quarterly with the goal of regional coordination focused on aligning housing and infrastructure needs to create a strong local economy.

*Housing Advocacy Group:* Organizations and individuals that have significant influence in the community, with representation from the non-profit builders, local chambers of commerce and various advocate organizations.

*Housing Action Team:* Work group made up of planning and community development staff from Cities, County, and SLOCOG.

*Community Stakeholders:* The broader community had opportunities to provide input through public updates to SLOCOG Board and its advisory committees, as well as through presentations to their community’s Councils and Boards of interest in the Summer 2023.

*Steering Committee:* Formed to oversee the vision for the Framework Engagement Strategy and to bring leaders from each of these stakeholder groups together, aligning and integrating the various interests that will lead to action on the region’s priorities.

*Elected Officials:* Two City Council Members with knowledge of regional differences bring the various perspectives and concerns voiced by their respective constituents for this Steering Committee. The full forty elected officials within the region had an opportunity to hear about the Framework and provide direction through public updates to SLOCOG Board as well as during presentations of the recommended Regional Framework to their Councils and Boards in Summer 2023.

**Figure 10: Agency Actions**

|             |                      |  |
|-------------|----------------------|--|
| <b>6/27</b> | <b>Morro Bay</b>     | <ul style="list-style-type: none"> <li>• Support HIP as a recommitment to the Regional Compact</li> <li>• Direct staff to return with discussion on ways to utilize and implement HIP</li> </ul>   |
| <b>7/11</b> | <b>SLO City</b>      | <ul style="list-style-type: none"> <li>• Support the HIP as it supports regional collaboration, to the extent it is consistent with the City's General Plan</li> </ul>   |
| <b>7/11</b> | <b>Atascadero</b>    | <ul style="list-style-type: none"> <li>• Provided verbal comments; did not take a vote to support at this time</li> </ul>  |
| <b>7/18</b> | <b>Pismo Beach</b>   | <ul style="list-style-type: none"> <li>• Support HIP as a recommitment to the Regional Compact</li> <li>• Direct staff to continue discussing ways to utilize and implement the HIP</li> </ul>   |
| <b>7/18</b> | <b>Paso Robles</b>   | <ul style="list-style-type: none"> <li>• Support HIP as a recommitment to the Regional Compact</li> </ul>  |
| <b>7/24</b> | <b>Grover Beach</b>  | <ul style="list-style-type: none"> <li>• Convey policy support for HIP as a recommitment to the Regional Compact</li> <li>• Provide staff direction on future discussions relating to implementation of HIP</li> </ul>   |
| <b>7/25</b> | <b>Arroyo Grande</b> | <ul style="list-style-type: none"> <li>• Support HIP as a recommitment to the Regional Compact</li> <li>• Direct staff to return with a discussion on ways to utilize and implement HIP during the comprehensive General Plan update</li> </ul>  |
| <b>8/2</b>  | <b>SLOCOG</b>        | <ul style="list-style-type: none"> <li>• Adopt the Regional Housing and Infrastructure <b>Framework</b> as amended as a foundational dynamic strategic planning tool to fulfill the Senate Bill 2 grant requirements.</li> <li>• Subject to funding availability, direct staff to maintain [and, as necessary, enhance] for future efforts.</li> </ul>   |
| <b>8/8</b>  | <b>SLO County</b>    | <ul style="list-style-type: none"> <li>• Accept the Framework as a strategic planning tool to fulfill the Senate Bill 2 grant requirements.</li> <li>• Direct staff to set a goal to achieve RHNA by end of cycle (2028)</li> <li>• Direct staff to work with elected officials to set steps for achieving goals during Planning's annual priority setting.</li> <li>• Advise regional partners of progress and convene a summit of cities and CSDs</li> </ul> |

Figure 10 records the nine agency actions related to the Regional Framework. During the discussion at the SLOCOG Board Meeting August 2, the effort's name was changed from the Regional Housing & Infrastructure Plan (HIP) to the Housing & Infrastructure Regional Framework.

As part of these discussions there were some common themes. Comments of support included the general value of the regional collaboration, the ease of use of the interactive mapping tool, and impressed by the amount of information and the rapid development. To build off the effort, decision makers were interested in more defined roles and timing for future phases, further refinement of land use/project data and prioritization, more engagement of unincorporated areas, continued development of Affordable-by-Design policies, advocacy to fund region's priorities, incorporate jobs information, and a focus on common communications and language.

## **FUTURE CONSIDERATIONS**

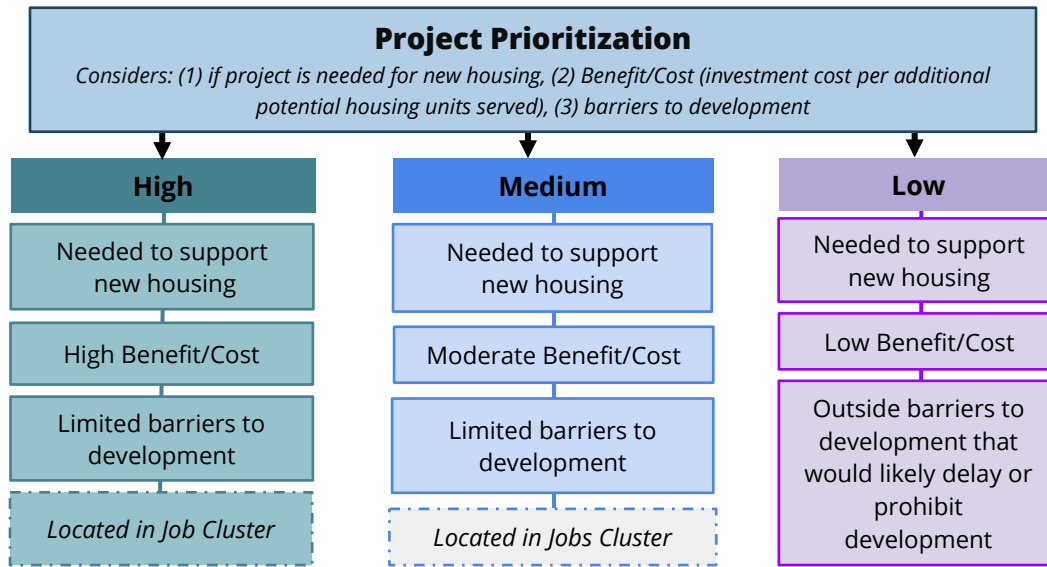
### **Infrastructure Prioritization**

Based on input from stakeholders in February & March 2023, the infrastructure projects were prioritized to maximize ability to accelerate housing within housing efficient areas, considering three factors: (1) if project is needed for new housing; (2) benefit/cost (investment cost per additional potential housing units served); and (3) barriers to development. Barriers to development include instances such as a building moratorium. These barriers are outside the controls of the Framework and slow housing development. The prioritization process can be seen in Figure 11: Prioritization Factors.

Infrastructure projects were divided into two lists, water and transportation, and then prioritized. It was concluded that transportation projects, in general, could be built at various stages of housing development. Whereas housing cannot be built without adequate water distribution and collection infrastructure. Each list was sorted by highest benefit/cost and the total funding need for the list was divided into three. The premise of the 2023 Framework is to accelerate housing development, so the vetted prioritization factors relate solely to the total amount of proposed housing. In the future, other factors like job-housing balance and proposed housing unit type could be considered.

The tiered priorities in Figure 11 were not finalized based on initial feedback from the City Councils in Summer 2023 and require more discussion. These factors were vetted multiple times but as a living document, there is room for continued refinement of the process and data. Currently, there is no funding specifically tied to the 2023 Framework so prioritizing the eighty projects further is unnecessary. However, the identification of the eighty projects (from 440) is a critical first step in linking the region's efficient housing areas to infrastructure projects.

**Figure 11: Prioritization Factors**



## Data Considerations

Creating balanced communities is one of the six 2020 Regional Housing Compact goals. The 2023 Sustainable Communities Strategy defines a jobs-housing balanced community as:

*A community where residents can both live and work. With jobs and housing in close proximity, vehicle trips and commute times reduce and active transportation and transit use increase. These balanced communities also provide a broad mix of housing options to accommodate households with a range of incomes.*

As a proactive measure, the jobs-housing balance of communities was analyzed using live/work percentages. A live/work percentage is the total number of employees living and working in the city or community boundaries divided by the total workers living in that boundary. In future iterations of the Framework, jobs-housing balance could be integrated through the live/work percentage and additional job cluster data as mentioned in Figure 4: Analysis Process and Figure 12: Future Data Considerations by Community.

Figure 12 and Figure 13 are for reference purposes only. This information is included since it relates to goals found in the 2020 Regional Housing Compact, stakeholder interest, and relates to the 2023 Affordable-by-Design Study. The 2023 Affordable-By-Design Study has shown that units within the multi-family category, depending on how and where designed, can lead to more aligned units in the low- and moderately priced income categories.

**Figure 12: Future Data Considerations by Community**

| <i>Community</i>       | <i>Number of Total Proposed Dwelling Units</i> | <i>% of multi-family units proposed</i> | <i>Live Work Percentage</i> |
|------------------------|--|---|-----------------------------|
| <i>Arroyo Grande</i>   | 600  | 18%                                     | 14%                         |
| <i>Atascadero</i>      | 722  | 75%                                     | 21%                         |
| <i>Grover Beach</i>    | 624  | 81%                                     | 9%                          |
| <i>Morro Bay</i>       | 120  | 47%                                     | 21%                         |
| <i>Paso Robles</i>     | 4,959  | 42%                                     | 28%                         |
| <i>Pismo Beach</i>     | 297  | 30%                                     | 12%                         |
| <i>San Luis Obispo</i> | 6,171  | 58%                                     | 41%                         |
| <b>County</b>          | 2,221  | 25%                                     |                             |
| <i>Cayucos</i>         | 7  | 0%                                      | 13%                         |
| <i>Los Osos</i>        | -  | 0%                                      | 11%                         |
| <i>Nipomo</i>          | 1,351  | 34%                                     | 9%                          |
| <i>Oceano</i>          | 4  | 100%                                    | 4%                          |
| <i>San Miguel</i>      | 152  | 0%                                      | 3%                          |
| <i>Santa Margarita</i> | 514  | 10%                                     | 2%                          |
| <i>Templeton</i>       | 193  | 19%                                     | 12%                         |
| <b>Total</b>           | <b>15,714</b>                                  |   |                             |

Source: Longitudinal Employer-Household Dynamics (LEHD) 2019, SLOCOG GIS 2021

**Figure 13: Future Data Considerations by Subregion**

| <i>Subregion</i>      | <i>Number of Total Proposed Dwelling Units</i> | <i>% of multi-family units proposed</i> | <i>Live Work Percentage</i> |
|-----------------------|--|---|-----------------------------|
| <i>North County</i>   | 6,540  | 42%                                     | 40%                         |
| <i>Central County</i> | 6,171  | 58%                                     | 44%                         |
| <i>North Coast</i>    | 127  | 44%                                     | 27%                         |
| <i>South County</i>   | 2,876  | 41%                                     | 27%                         |

Source: Longitudinal Employer-Household Dynamics (LEHD) 2019, SLOCOG GIS

## **CONCLUSION**

The 2023 Housing & Infrastructure Regional Framework is the first planning tool of its kind, and it is intended to be a living document. For the last five years, collaboration has continued to build, and these incremental steps have allowed the region to make progress in addressing the monumental challenges of the housing and infrastructure shortage. Nothing in the Framework mandates any of the Cities, County, or SLOCOG to take certain actions, but rather offers analysis to inform decisions and tools to support our communities moving forward. It is understood that each community is unique and must consider what works for their community while considering how to be a good regional partner. The 2023 Framework moves the region one step further in a larger and ongoing regional collaborative effort to develop an adequate supply of housing, create resilient infrastructure, and support our economic prosperity.

## **APPENDIX**

**[Appendix A: Draft Affordable-by-Design Study](#)**

**[Appendix B: Draft Funding Strategies Assessment](#)**

**[Appendix C: Draft Housing Highlights](#)**

**[Appendix D: 2023 Regional Framework Projects](#)**

**[Appendix E: Regional Compact & Housing Element Regional Chapter](#)**