

The biggest and smallest barriers to California housing development

Survey evidence from developers, planning commissioners, and housing advocates*

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February 28, 2021

* This analysis was supported by funding from the California Homebuilding Foundation (CHF). CHF provides grants for research projects on issues pertinent to the homebuilding industry. CHF's mission is to advance homebuilding in California through scholarships, research, education, and professional recognition. We thank CHF for its support. We also acknowledge and thank Honor Hayball for her excellent research assistance. We are responsible for all errors and omissions.

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Executive Summary

New housing construction in California lags substantially behind housing demand and leads to higher-than-average home prices. High housing costs are associated with social crises such as housing instability and homelessness. Many believe that the shortage in new housing development in the state owes to public opposition, environmental reviews that require multiple layers of approval, local governments' fiscal disincentives, and scarcity of parcels.¹

This study's goal is to identify common ground on which to build dialogue and feasible solutions. We draw results from a survey we designed to elicit the *perceptions* of three important stakeholder groups: planning commissioners, housing developers, and housing advocates/affordable housing developers. We identify the largest and smallest differences in perceptions among these groups about obstacles to increasing housing supply in California.

We surveyed three populations. First, we surveyed a random sample of planning commissioners from cities in California with 100,000 or more residents. Second, we surveyed housing developer members of the California Building Industry Association (CBIA), who represent about 80% of new housing developments in the state. Finally, we surveyed housing advocacy organizations and affordable housing developers.

We developed three online survey questionnaires specific to each group and administered them via the online platform, Qualtrics, by collecting anonymous responses from each. We administered the surveys to members of the three target groups (66 planning commissioners, 30 housing developers, and 89 housing advocacy organizations/affordable housing developers) from December 15, 2020, to January 29, 2021. The response rates varied (65% response rate for the planning commissioner group, 90% for the developer group, and 29% for the housing advocate/affordable housing developer group). Because of the small sizes of all three samples, we assess our results qualitatively, rather than statistically.

Takeaways: Potential Common Ground and Areas for Dialogue:

- All three surveyed groups largely agreed that planning commissions are perceived to be more favorable to new housing development than municipal elected officials and are perceived to be less persuaded by public opposition than municipal elected officials.
- All three surveyed groups agreed on the top priorities of planning commissions. The two most frequently reported priorities were traffic congestion and affordable housing.
- All three surveyed groups appeared to agree that there is a need for updated zoning and improved infrastructure to accommodate new housing development. There is some disagreement however on how zoning should be updated.
- Developer and some planning commissioner respondents agreed that the review and approval process for new housing development proposals has bureaucratic difficulties.
- All three surveyed groups agreed that COVID-19 has made the process of approving and building housing even harder in California.

¹ <https://lao.ca.gov/reports/2015/finance/housing-costs/housing-costs.pdf>

Introduction

From 1980-2010, housing construction nationally grew by 54%, while California's housing stock grew by only 32%; as a comparison, housing construction in California from 1940-1970 grew by 200%.² To make matters worse, the California Legislative Analyst's Office (LAO) estimated that 70,000-110,000 new housing units would have been needed per year to keep housing prices from rising faster than the national average.³

The LAO report lists several possible causes for the shortage in California's housing production: local resistance to housing development, growth control ballot initiatives, environmental reviews that require multiple layers of approval, local governments having fiscal incentives (property or sales tax revenues) to favor nonresidential or low-density housing, and scarcity of parcels.⁴ To address these perceived obstacles, California state legislators and the Governor have used legislation and the threat of lawsuits to try to force cities and counties to permit more housing construction.

However, local jurisdictions have seen such action as preemption of local land use control. And COVID-19 has worsened local jurisdictional capacity to review new housing development proposals, as local municipal budgets have been eviscerated during the pandemic.

California needs more housing built. We tackle this issue by reporting on the results of online surveys of three important stakeholder groups in California: planning commissioners, housing developers, and housing advocates, with the aim of identifying the largest and smallest *perceived* differences in obstacles for increasing housing supply in the cities and counties of California. We present these findings in the hope that potential areas for dialogue among these and other stakeholders can be identified using these research results.

The remainder of this report is organized into the following sections: (1) we describe the methodology for data collection; (2) we list the limitations of the study design and results; (3) we report on the survey results, including response rates, responses to questions asked of all respondents, and development barriers identified by each target population respondent group (including procedural issues, California Environmental Quality Act (CEQA), infrastructure and zoning, and COVID-19); and (4) we conclude with a summary of the overall findings, research implications, and areas for potential dialogue. We also include, in an appendix, details of the survey sample and the questionnaire design.

² <https://lao.ca.gov/reports/2015/finance/housing-costs/housing-costs.pdf>

³ ibid.

⁴ ibid.

Survey Methodology

Our goal is to gain insight into *perceived* barriers to housing development in California cities with populations of more than 100,000. We therefore used the Qualtrics online survey platform and collected anonymous responses to glean the views of key stakeholders in the California housing development process.

Target populations for the survey: planning commissioners, housing developers, and housing advocates/affordable housing developers

Planning commissioners determine whether developers receive entitlements, either through rezoning or conditional use permits. Planning commissions typically make recommendations to city councils/county boards of supervisors (hereafter, councils) on such matters; the council may, in turn, decide to accept or reject these recommendations. Historically, councils have looked to planning commissions for recommendations on zoning and parking; planning commissioners and councils have also increasingly looked to planning staff for technical advice and analysis on which to base their decisions.⁵ Because of this relationship between appointed planning commissioners and elected councils, we aimed to survey planning commissioners as their *perceptions* are quite relevant to understanding the environment in which new housing is proposed and built in California.⁶

Housing developers are, of course, the people and firms that bear the consequences and expenses of land use policy decisions and enforcement. We therefore aimed to survey housing developers to learn their “pain points” in the entitlement process.

Finally, housing advocates/affordable housing developers often voice the concerns or support of communities in which housing development occurs. By housing advocates, we mean a broad set of organizations ranging from non-profit organizations aiming to advance housing rights or to build affordable housing units, to construction worker unions, and law firms. Housing advocates play an integral part in the California housing market because of California's unique CEQA law, which requires an articulation of risks and mitigations regarding the environmental impacts of

⁵ Boone, C. G., & Modarres, A. (1999). Creating a toxic neighborhood in Los Angeles County: A historical examination of environmental inequity. *Urban Affairs Review*, 35(2), 163-187 (available at <https://doi.org/10.1177/10780879922184347>). In this paper, an historical analysis of the City of Commerce shows how the planning commission was created to provide the city council with recommendations after Commerce incorporated because of dissatisfaction with the county services residents received as an unincorporated area of Los Angeles County.

⁶ See also Takahashi, L. M., & Gaber, S. L. (1998). Controversial facility siting in the urban environment: Resident and planner perceptions in the United States. *Environment and Behavior*, 30(2), 184-215 (available at <https://doi.org/10.1177/0013916598302004>). In this paper, an analysis of two different surveys, one of planning directors and the other of a national random sample of residents, pointed to differences in perception about what constituted the most “noxious” of land uses (environmental versus human services). The resident survey results indicated that, for human service facilities, rejecting attitudes were related to fear about the possible users of the facilities and doubts that the facilities would fit into the neighborhood built environment fabric.

proposed development.⁷ This law allows anyone to sue the developer during the entitlement process for projects greater than a certain size for essentially any reason, including frivolous lawsuits. As a result, we aimed to survey a broad range of housing advocates to determine their most important *perceived* issues related to new housing development.

Survey design and pilot testing

The research team constructed three questionnaires specific to each target group based on issues that have been raised in published studies and public media accounts. The goal of the surveys is to elicit *perceived* barriers to housing development. Although most survey questions were tailored to the specific target population, we included five overlapping questions across the three questionnaires:

- 1) How favorable do you think planning commissions have been regarding new housing development?
- 2) How favorable do you think city councils/county boards have been regarding new housing development?
- 3) To what extent do you believe the planning commission is persuaded by public opposition arguments to new housing development?
- 4) To what extent do you believe the city council/county board is persuaded by public opposition arguments to new housing development?
- 5) Which public concerns do you prioritize as a member of the planning commission when considering new development?

We additionally asked each of the groups specific questions. For planning commissioners, this included questions pertaining to whether their commission has sufficient resources and whether they believe there is enough housing in their cities. For developers, this included questions about the frequency with which they were sued, the entities that sued them, and the ease of scheduling public hearings. For advocates, this included questions about the focus of their advocacy work, whether they have ever sued over housing development, their key priorities, and concerns regarding new housing development.

The research team submitted the study design, which included the three survey questionnaires, including a consent procedure and research team contact information, to the University of Southern California Institutional Review Board (USC IRB) for review. After receiving expedited approval from the USC IRB, the survey questionnaires were piloted with California Building Industry Association (CBIA) staff and a former planning commissioner who also reviewed the housing advocate survey questionnaire. We sent the draft housing advocate survey

⁷ Hernandez, J. (2018). California Environmental Quality Act Lawsuits and California's Housing Crisis. *Hastings Env't LJ*, 24, 21 (available at <https://heinonline.org/HOL/P?h=hein.journals/haswnw24&i=34>). This paper suggests, however, that instead of solely or primarily protecting the environment, "most CEQA lawsuits filed in California seek to block infill housing and transit-oriented land use plans, as well as public service and infrastructure projects in existing California communities" (p. 21).

questionnaire link to two housing advocacy organizations but did not receive any response; this might have been related to the timing of the pilot as this occurred in mid-November 2020.

The feedback to the pilot provided useful information about needed clarification of questions and closed-ended response options (which were revised) and redundant questions (which were deleted).

Survey administration

With the final versions of the three questionnaires, we used the web-based platform Qualtrics to survey our three populations of interest. The initial survey link was emailed to the three target population groups in mid-December 2020, with reminder emails sent in early and mid-January 2021. The response was anonymous, so the reminders were sent to all the target populations, with a thank you to those who had responded to the survey and a request to complete the survey if the individual had not already done so.

For the planning commissioner group, the research team surveyed a stratified random sample of planning commissioners. The strata were the planning commissions of the 66 cities with a 100,000 population or larger. One member from each of these planning commissions was randomly selected using a random number generator created through a Python program. Email contacts for these planning commission members were obtained from publicly available sources, or if not available, an email with the survey information and link was sent to the general planning commission email with a request to forward the survey link to the identified planning commission member.

For the developers, we shared the developer survey link with the California Building Industry Association (CBIA) Chief Executive Officer for distribution to the 30 CBIA developer members constituting about 80% of all new housing development projects in California.

For the housing advocates, the research team identified advocacy organizations and contact emails for 89 organizations in California involved in housing advocacy or affordable housing development. We emailed these organizations with the survey link in mid-December 2020.

Caveats and Limitations

To preserve respondent anonymity, the survey questionnaires did not ask for identifying information from respondents, and consequently, the research team does not know who actually responded to the surveys. The consequence of this is that the responses to our questionnaires are almost surely subject to selection bias (meaning that internal and external validity are problematic, so cause and effect inferences using the survey data are difficult to impossible to make).⁸ Therefore, the analysis and conclusions contained in this report should not be taken to

⁸ Berk, R. A. (1983). An introduction to sample selection bias in sociological data. *American sociological review*, 386-398 (available at <https://doi.org/10.2307/2095230>).

have statistical validity, but rather serve as a compilation of responses from groups of respondents with expertise on the new housing development and land use decision-making process in California's largest cities.

Further, as we discuss in the next section, while the response rates for the planning commissioner random sample and the developer target populations were relatively high, the same was not true for the advocates that we contacted. Consequently, in addition to the caveats and limitations already discussed, the responses by the housing advocacy organizations to this survey should not be construed as representative of housing advocacy organizations or affordable housing developers. In addition, we did not require that respondents complete any of the questions in the survey, which may have contributed to incomplete responses.

Survey Results

In this section, we first focus on the overlapping questions among the three survey populations and then discuss areas in which there is disagreement. Identifying disagreements is a basis for possible dialogue.

Response rates

We emailed the survey link to 66 planning commissions, and for each, we randomly selected a commissioner. We received a response from 43 (a 65% response rate). We did not require that respondents complete all questions, and 28 of the respondents completed most of the survey questionnaire (a response rate of 42% for largely completed questionnaires). This yielded about 20-21 responses for most questions.

CBIA emailed the survey link to 30 developers (responsible for 80% of housing development in the state). We did not require that respondents complete all questions, and 27 completed most of the survey questionnaire (a response rate of 90% for largely completed questionnaires). This yielded about 22-25 responses for most questions.

Of the 89 advocacy organizations to which we sent out the survey link via email, 27 provided at least a partial response to the survey questionnaire (a 29% response rate). We did not require that respondents complete all questions, and only 13 completed most of the survey questionnaire (a response rate of 14% for largely completed questionnaires). As a result, we have a maximum of 12 usable responses per question across the entire questionnaire though most questions only have 10-11 responses.

Responses to Questions Asked to All Three Groups

Planning commissioner respondents (red) reported that councils have favorable views of new housing development [Figure 1, left panel]. The advocate respondents (dark purple) and developer respondents (yellow) did not agree [Figure 1, left panel].

Over 60% of planning commissioner respondents reported that their city council/county board of supervisors is either "a lot" or "a great deal" favorable toward new housing development, while only 26% of advocate respondents and fewer than 20% of developer respondents reported similarly. Over 40% of developer respondents reported that city councils/county boards of supervisors are only "a little" favorable to new housing development.

Planning commissioner respondents report commissions to be less favorable of new housing development than councils. While 20% of planning commissioner respondents report that councils are "a great deal" favorable to new housing development [Figure 1, left panel], only 5% of commissioner respondents reported the same for themselves [Figure 1, right panel].

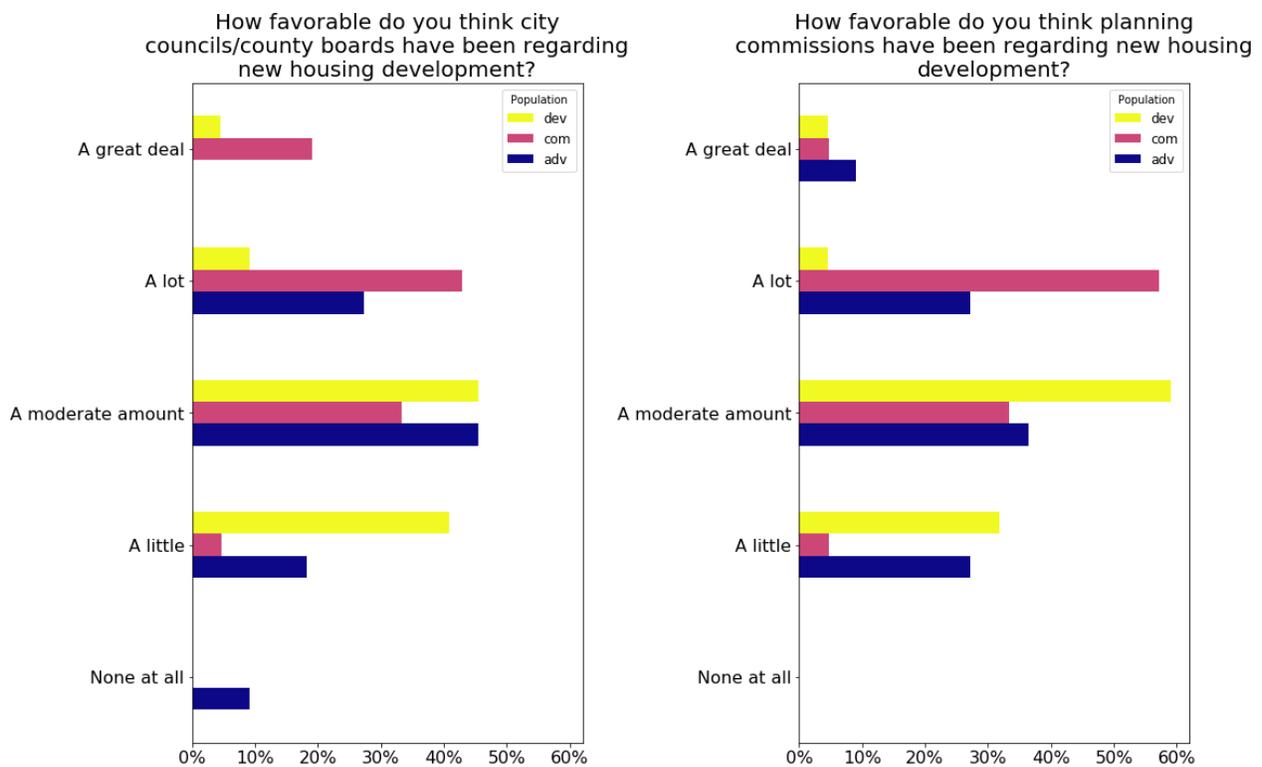


Figure 1: Responses to questions about favorability toward new housing development among councils and commissioners.

Perceptions about the persuasiveness of public opposition arguments also varied considerably across the three target groups [Figure 2]. Half of the developer respondents (yellow) reported that city councils/county boards of supervisors were either "a lot" or "a great deal" persuaded by public opposition arguments [Figure 2, left panel]. Only slightly more than 10 percent of planning

commissioner respondents (red) reported that city councils/county boards of supervisors were persuaded “a lot” by public opposition arguments. We did not ask this particular question of advocate respondents.

As to whether planning commissioner respondents themselves are persuaded by public opposition arguments, there was again a clear split among the three groups [Figure 2, right panel]. About 40% of developer respondents (yellow) reported that planning commissioners were persuaded "a great deal" by public opposition arguments. Over 60% of planning commissioner respondents (red) reported that they were persuaded "a moderate amount" or "a little" by public opposition arguments. The advocate respondents (dark purple) reported views in between those of developer respondents and planning commissioner respondents, with about half reporting that planning commissions were persuaded "a moderate amount" by public opposition.

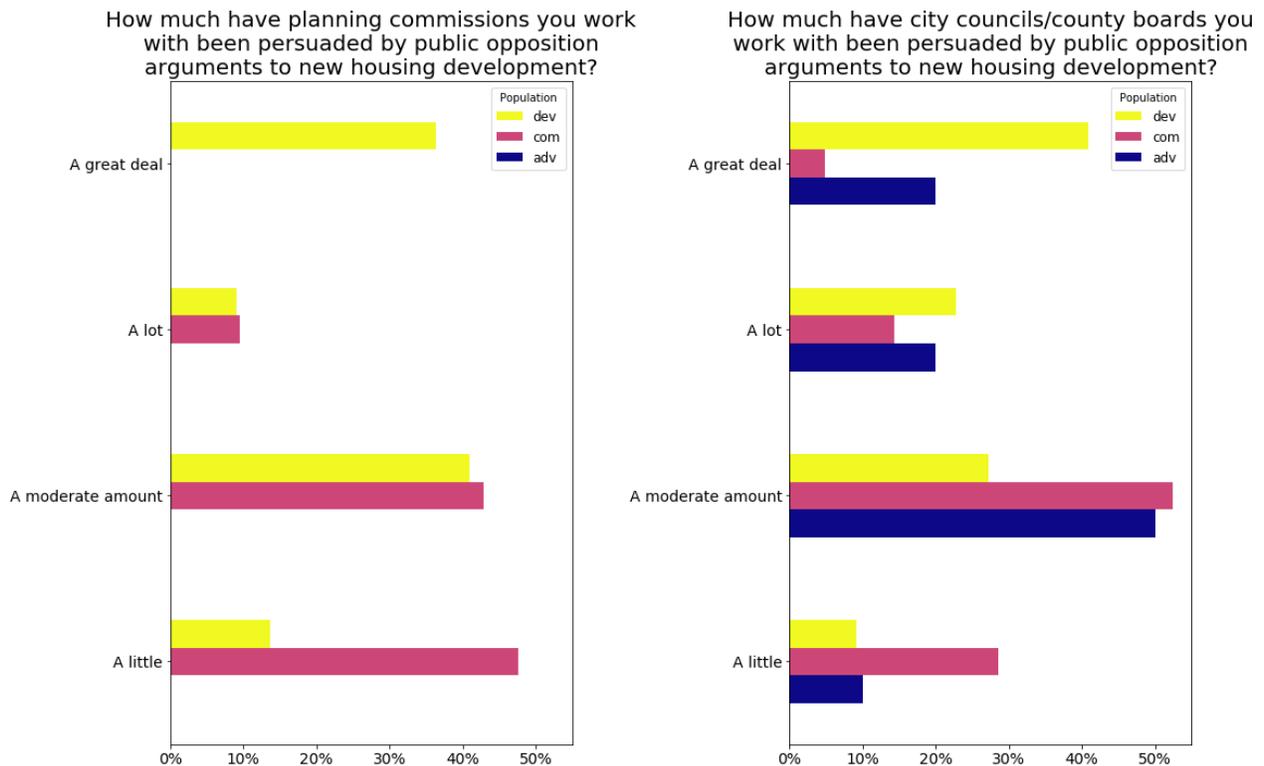


Figure 2: Perception of responsiveness to public opposition

Therefore, there appears to be agreement among the three target populations in their perceptions that councils are more favorable toward new housing development and that planning commissions are less persuaded by public opposition arguments. This would suggest that new housing development proposals might be approved at the planning commission level, but if public opposition is present such proposals may not be approved at the council level.

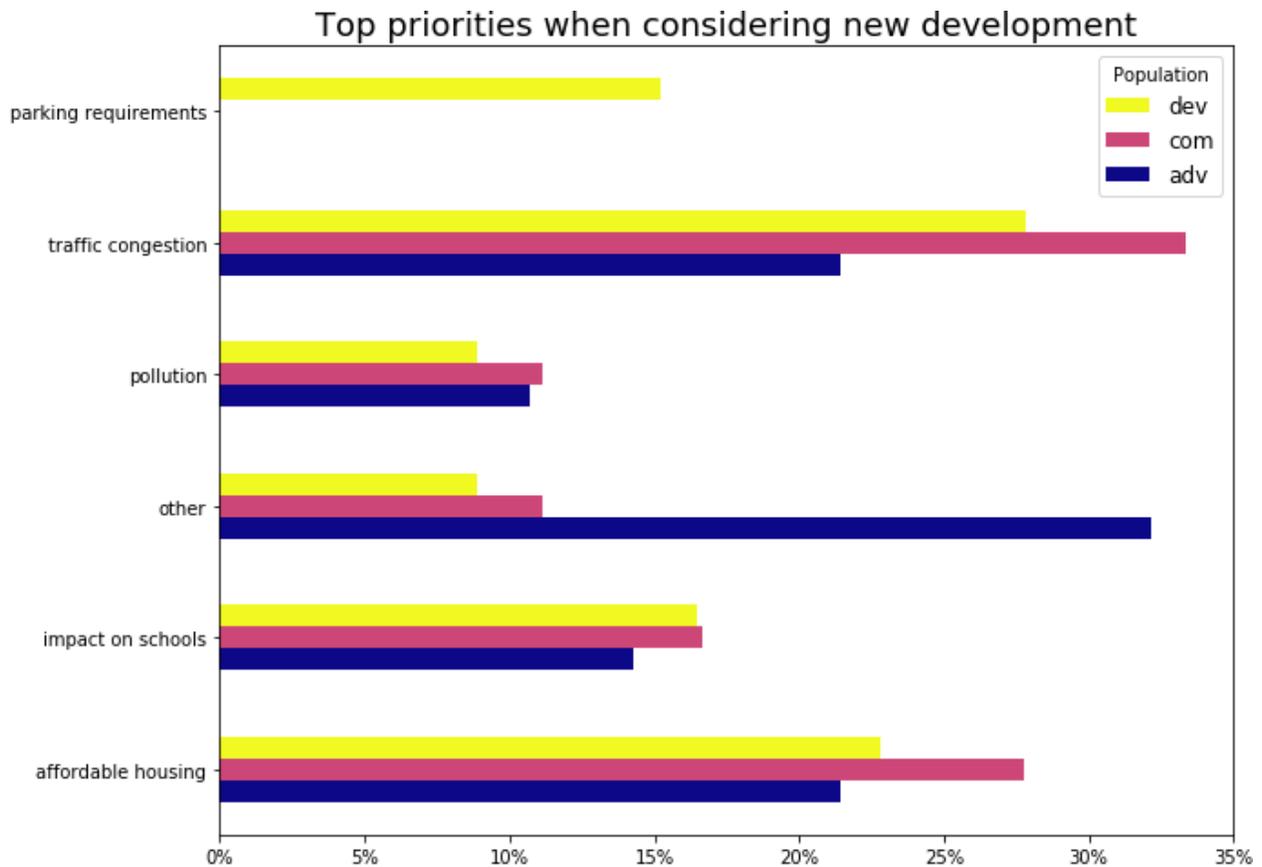


Figure 3: Responses to “which public concerns have been prioritized by the planning commissions [and city councils/county boards of supervisors for advocate group only] you have worked with when considering new development?”

Figure 3 shows broad agreement among the three survey groups about the perceived highest priorities of planning commissions. According to the planning commissioner respondents, the two highest priorities among those included in the questionnaire (parking, traffic congestion, pollution, schools, affordable housing, other) were traffic congestion (34%) and affordable housing (27%). Developer respondents and advocate respondents also selected these two issues most often. This agreement implies that the advocate and developer respondents appeared to understand the highest priorities of planning commissions. However, there are two areas where the priorities reported by developer respondents differed from the priorities selected by others. Sixteen percent of developer respondents were the only ones that chose parking as a perceived priority for planning commissions. Parking does seem to be an issue for some planning commissions; one planning commissioner respondent mentioned in an open response section that the planning commission was reducing parking requirements to facilitate new housing development.

Unlike the developer and planning commissioner respondents, advocate respondents reported in the “other” category that business development and infrastructure provision were critical

priorities for city councils and planning commissions when making new housing development decisions.

Development barriers

Developers have often discussed new housing development barriers in media accounts and in our conversations. The survey questions on barriers were based on this information. Similarly, we also enumerated concerns mentioned by the planning commissioner and advocacy respondents that may inform developers in future dialogues about pathways forward.

We group barriers listed by respondents into three categories: procedural, CEQA, and infrastructure. These barriers are ordered from most to least important as ranked by survey respondent frequency.

Procedural Issues

Developer Respondents

Procedural barriers identified by developer respondents included the bureaucratic processes of submitting required documents and public hearings. Three-quarters of the developer respondents (18 of 24 responses) reported they typically had difficulty scheduling timely council and planning commission hearings to allow them to move their projects forward. Thirty-one percent of developer respondents (5 of 16 responses) also mentioned "a lack of consistency in the planning process" that made the approval process unpredictable. Some of these inconsistencies were related to the time needed to get a project approved, with a reported range of 18-45 months and a median of 24 months. In that multi-year process, developer respondents reported staff and commissioner turnover, presumably resulting in loss of institutional knowledge. Finally, half of the developer respondents (12 of 24 responses) reported they had to abandon projects owing to impact fees. Though we did not ask why, the fees presumably make projects financially infeasible.

Planning Commissioner Respondents

When asked about perceived barriers faced by developers, 28% of commissioner respondents (5 of 18 responses) reported that the approval processes took too long, and 17% (3 of 18 responses) reported that planning commissions/departments did not have sufficient resources. More striking, however, is that 81% (or 17 of 21 responses) of planning commissioner respondents reported that their commissions had adequate resources to perform their tasks.

Only three planning commissioner respondents (17%) reported that code and other regulatory compliance issues made it difficult for developers to build new housing. Interestingly, no developer respondents mentioned compliance per se as an issue. When we asked what steps planning commissioner respondents' cities took to increase new housing development, three planning commissioner respondents (17%) said the cities made changes to general or specific plans--that is, some rezoning. Three planning commissioner respondents (17%) made special

mention in the "other" open-ended section of zoning amendments to allow for more new housing development. One (5%) planning commissioner respondent mentioned substantially lowering parking requirements in transit-rich locations.

We also asked planning commissioner respondents about the hurdles they themselves encountered during the approval process. Of the eleven who responded to this question, four reported that they would like more time to review project-related documents, four reported that their commission could use more funding to handle the caseloads, and yet another four reported the need for staff or city officials who specialize in housing-related issues. Three planning commissioner respondents noted the need for more local control, though we are not sure precisely what they meant by this. In a question on whether cities took steps to expedite or facilitate new housing development, one commissioner respondent mentioned that the city streamlined the approval process.

Anecdotes from planning commissioners in the pilot phase of the study suggested that there were planning commissioners who do not believe more housing is necessary. In the survey, we asked whether planning commissioner respondents thought there was too much, enough, or just enough housing in their jurisdiction. No commissioner respondent answered "too much housing," but as we can see in Figure 4, 33% (7 of 21 responses) of planning commissioner respondents reported that their jurisdictions have sufficient housing. We did not ask the planning commissioner respondents whether they themselves would block new housing development proposals.

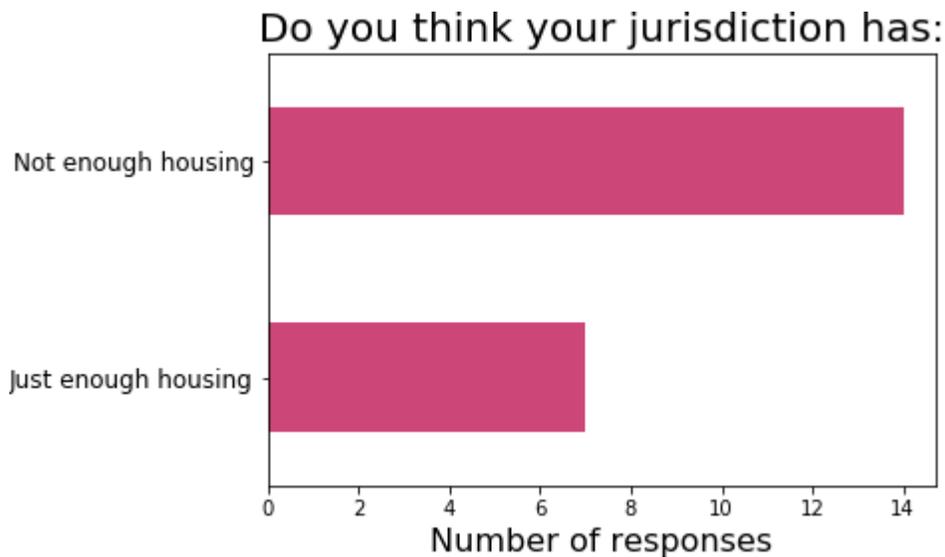


Figure 4: Planning commissioner respondent responses to "is there enough housing in your jurisdiction"?

CEQA

Developer Respondents

CEQA was enacted to protect California's environment and, by extension, its people. We must remember the context within which CEQA came about--a state whose air quality was, at best, unpleasant and, at worst, unhealthy.⁹ California cities' air quality still ranks among the worst in the nation, although there is no denying that it is substantially better than it was at the time of CEQA's enactment. But CEQA is an impediment to housing development, as it exposes developers to two risks: mitigation fees/requirements, some of which may have nothing to do with environmental quality, and litigation, some of which might be spurious. Indeed, one of the principal investigators of this study, in his role as director of the USC Lusk Center, hears frequent complaints from homebuilders about spurious lawsuits.

In one sense, this frustration on the part of the homebuilding community appears in the developer responses to our survey, as the most commonly cited development barrier (37%, or 6 of 16 responses) in our open-ended question about barriers *is* CEQA, EIR, mitigation fees, and sometimes their "arbitrary interpretation." Half of the surveyed developers (12 of 24 responses) reported that they stopped projects due to impact fees, half (13 of 26 responses) reported that the city's requested mitigations substantially altered the projects, and 45% (10 of 22 responses) reported that they had to make substantial cuts to project density.

More than one-third (37%, or 9 of 24 responses) of the developer respondents reported having to settle CEQA lawsuits for at least half of their projects. More broadly, half of the developer respondents (54%, or 13 of 24 responses) reported that they experienced legal challenges, CEQA-related or otherwise, that ended projects.

When we asked developer respondents who sued them, we only received eight write-in responses (out of a possible total of 27, or about 30% response-rate to this question). All eight mentioned an environmental group as a litigant. Three responded they were sued either by a city or a neighborhood group, and two reported being sued by a labor union.

Relatedly, of the nine advocate respondents who answered our question on whether they ever sued a developer to voice their concerns or modify a project, four answered yes.

Planning Commissioner Respondents

For the planning commissioner respondents, litigation was not mentioned in their responses. However, some planning commissioner respondents did mention the need for CEQA and zoning reform. In an open-ended question about how planning commissions might be able to better deploy their resources to permit more housing development, two answered that CEQA and zoning reform would help.

⁹ For a brief history of CEQA, see Barbour, E., & Teitz, M. B. (2005). *CEQA reform: Issues and options*. San Francisco, CA: Public Policy Institute of California (available at <https://www.ppic.org/publication/ceqa-reform-issues-and-options/>).

Public Opposition

Developer Respondents

The developer respondents had a near consensus (91%, or 20 of 22 responses) that the activist public--from NIMBYs (Not in My Back Yard) to BANANAs (Build Absolutely Nothing Anywhere Near Anyone)--impeded new housing development. And as we already reported, developer respondents reported councils, and to some extent, planning commissions, were persuaded by public opposition arguments.

Advocate Respondents

The advocate respondents reported that they generally support more housing--only one of the sixteen who responded thought that it would be better to build less housing. But the survey responses indicated that this reported perception had caveats. About 62% (10 of 16 advocate respondents) placed a priority on affordable housing.¹⁰ Advocate respondents also reported that they wanted to ensure that new housing development did not displace affordable housing units, including low-rate market units. Two advocate respondents supported more community involvement in the development process and placed an emphasis on building near transit and jobs---implying a preference for infill over greenfield development.

Eight of eleven advocate respondents reported that planning commissions and ten of eleven reported that councils are at least moderately persuaded by public opposition arguments to new housing development. Eight of the eleven advocate respondents reported that they interact with public officials, and nine of ten reported that they interact with community groups. They are, after all, advocates.

Planning Commissioner Respondents

Despite both developer and advocate respondents saying that planning commissioners and councils are somewhat persuaded by public opposition arguments, as discussed above, most planning commissioner respondents still reported that they themselves were not highly persuaded by public opposition arguments.

¹⁰ Affordable housing also elicits public opposition. See for example Tighe, J. R. (2010). Public opinion and affordable housing: A review of the literature. *Journal of Planning Literature*, 25(1), 3-17 (available at <https://doi.org/10.1177/0885412210379974>).

Infrastructure and Zoning

There is agreement across the three survey groups that current infrastructure and zoning are not sufficient to accommodate the high demand for new housing development.

Developer Respondents

The majority of developer respondents (67%, or 16 of 24 responses) reported that cities should have by-right zoning for the type of housing that is demanded. However, when we asked developer respondents about barriers to new housing development, only 12% (2 of 16 responses) reported that zoning and city infrastructure were inadequate to accommodate growth. This is far behind other issues reported by developer respondents, such as CEQA reform and streamlined approval processes. Moreover, 75% (18 of 24 responses) of developer respondents reported a need for more single-family zoning, which stands in sharp contrast to the concerns of planning commissioner respondents and advocate respondents about the need for more affordable housing. Only 25% (6 of 24 responses) of developer respondents reported a need for more multi-family zoning.¹¹

Planning Commissioner Respondents

In terms of possible city or county actions, there is some agreement across the survey groups for zoning reform. According to planning commissioner respondents, 35% (7 of 20 responses) reported that they give by-right approval for including affordable housing, which allows developers to eschew the need to get approval from the planning commission and councils. Another 45% (5 of 11 responses) of planning commissioner respondents reported that their city provides density bonuses for including affordable housing. Similarly, 71% (10 of 14 responses) of planning commissioner respondents reported that their city had recently updated its master plan.

Housing Advocate Respondents

Advocate respondents agree on the issue. About 25% (3 of 12 responses) of advocate respondents mentioned the need for better zoning and infrastructure to place low-income households close to transit and employment opportunities. About 36% (4 of 11 responses) of advocate respondents reported that current zoning is inadequate to address affordable housing deficiencies, although more mentioned issues such as high cost of development (55%, or 6 of 11 responses), gentrification (45%, or 5 of 11 responses), and NIMBYs (45%, or 5 of 11 responses).

Overall, it seems all three survey groups agree about the need for updated zoning plans and better infrastructure to accommodate city growth, especially with respect to new housing development. Zoning and approval reforms made by cities and counties to incentivize more affordable housing are in line with planning commissioner and advocate respondent priorities and may ease the burden for the 62% (15 of 24 responses) of developer respondents who

¹¹ We wish we had more information about the developer respondents and their primary development focus. We may very well have over-sampled single-family housing developers.

reported they were pressured by the city to include more affordable housing, and the 61% (14 of 23 responses) of developer respondents reporting their projects were prevented from moving forward due to requests for more affordable housing. However, there is some disagreement in the type of zoning that is needed among the three survey groups; we believe that may be due to our possible over-sampling of single-family housing developers compared to the planning commissioner and housing advocate survey groups.

COVID-19

There is some disagreement on how much COVID-19 has slowed new housing development project review and approvals (Figure 5).

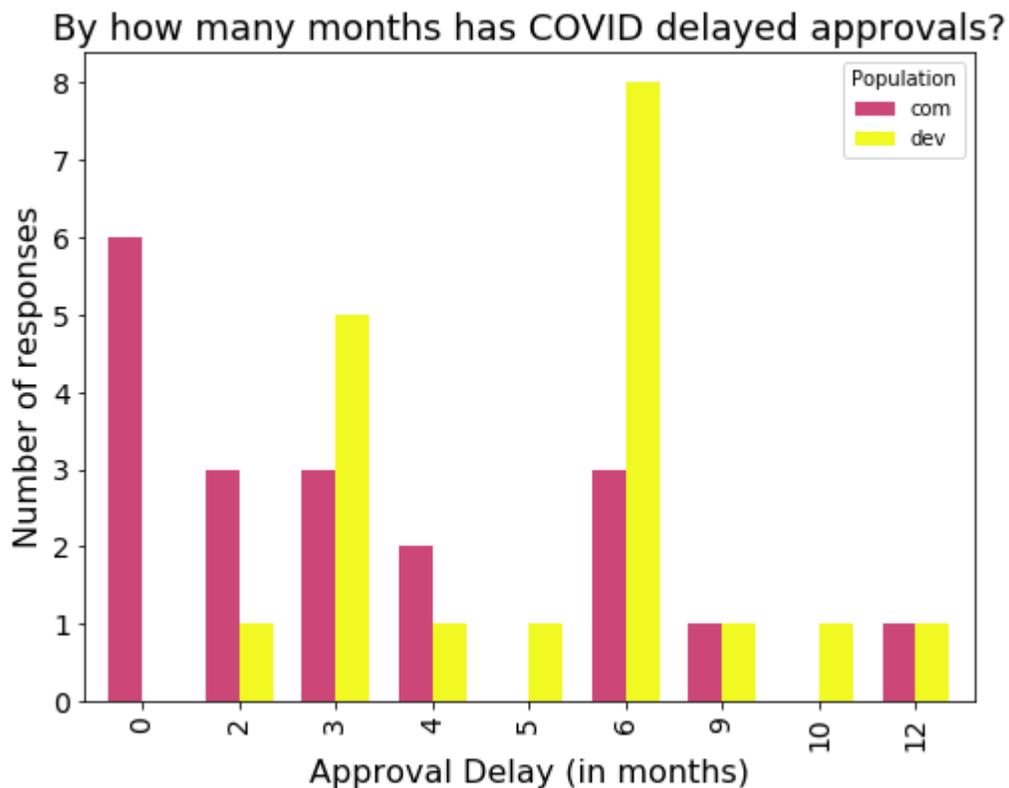


Figure 5: Estimated project delay due to COVID-19

Planning Commissioner Respondents

About 32% (6 of 19 responses) of planning commissioner respondents (red) reported that COVID-19 did *not* impact approval timelines, while 26% (5 of 19 responses) reported that COVID-19 delayed approval rates by at least six months. About 38% (8 of 21 responses) of planning commissioner respondents reported that priority for their work has shifted more toward affordable housing.

Developer Respondents

The latter set of planning commissioner respondents were in line with the 58% (11 of 19 responses) of developer respondents (yellow) reporting that COVID-19 delayed entitlements by at least six months. Among the developer respondents reporting COVID-19 delayed entitlements, slow-downs at the city and planning commissions were the perceived cause of delays. COVID-19-related delays are not costless for developers. Sixty-seven percent (14 of 21 responses) of developer respondents reported that COVID-19 prevented them from fulfilling contractual obligations such as construction timelines and closing agreements. It was not necessarily planning issues that caused the delays--developer respondents also reported facing supply chain and labor shortage issues. Only 33% of developer respondents reported no COVID-19 delays.

Housing Advocate Respondents

All advocate respondents (6 of 6 responses) reported that COVID-19 changed their advocacy priorities to focus more on the immediate need to keep people housed.

Conclusion

Discussion

To summarize, the surveys of the stakeholder groups in new housing development provided important initial insights into the varying perceptions by planning commissioners, housing developers, and housing advocates/affordable housing developers. As already stated, comparisons among the groups cannot be analyzed using standard statistical techniques because of small sample sizes. We consider the overall patterns as the first steps for highlighting potential areas for dialogue and continued investigation.

The descriptive analysis showed agreement among the three survey groups in their perception that planning commissions are more favorable toward new housing development and are less persuaded by public opposition arguments than elected city councils/county boards of supervisors. There was also agreement among the three survey groups about the perceived top priorities of city councils/county boards of supervisors and planning commissions, with traffic congestion and affordable housing at the top of the lists.

Among barriers to new housing development and zoning, there was some agreement and some disagreement among the three survey groups. All three survey groups appeared to agree about the need for updated zoning plans and improved infrastructure to accommodate new housing development. The groups did, however, disagree on how zoning should be changed. Developer respondents reported that single-family zoning was most needed (though this may owe to our possible oversampling of single-family housing developers). Planning commission and advocate respondents reported that more affordable housing was needed, with by-right and density bonuses identified as ways that cities have or could increase affordable housing development.

The survey groups had some disagreements about how much the approval process stymied new housing development. Developer respondents and some planning commissioner respondents agreed that the process had bureaucratic difficulties. Developer respondents highlighted the difficulty of scheduling hearings and the lengthy time to approval. A few planning commissioner respondents reported that the approval process took too long and that commissions did not have sufficient resources. However, in contrast, a large majority of planning commissioner respondents reported that their commissions had adequate resources to perform their tasks.

COVID-19 has affected new housing development in different ways, according to the three survey groups. For planning commission respondents, there were some that reported little impact, while there were others who reported large delays in new housing development proposal review. For developer respondents, existing delays were exacerbated by COVID-19, and for advocate respondents, the priorities turned to keeping residents housed.

Implications and Areas for Potential Dialogue

The areas where the three survey groups showed agreement provide a first step in developing topics for dialogue, building mutual understanding, and potential pathways forward to new housing development.

The findings suggest the following areas for building dialogue and mutual understanding:

- Planning commissions are perceived to be more favorable to new housing development than municipal elected officials, and less persuaded by public opposition arguments than municipal elected officials.
- All three survey groups agree that planning commissions have the following top priorities: alleviating traffic congestion and providing more affordable housing.
- All three survey groups appeared to agree that there is a need for updated zoning and improved infrastructure to accommodate new housing development. There is some disagreement on what the new zoning should be.
- The review and approval process for new housing development proposals has bureaucratic difficulties, including scheduling, and planning staff, and planning commissioner turnover.
- COVID-19 has made many of these issues worse.

Future Work

Our work to this point is preliminary and suggestive--it has not created measures that could be followed across time to determine whether it is becoming easier or harder to develop housing in California. Our survey has also not perfected measures that solicit the areas and degree of agreement/disagreement among the three stakeholders. Future work should build on this report to develop more targeted survey measures.

We also would like to survey more broadly and deeply. We think it is important to get stronger participation from the advocacy community. While we received strong response rates from the developer and planning commissioner respondents, we do not know the extent to which these responses were subject to selectivity bias. We may in the future go through an IRB process that will allow us to identify our respondents.

Appendix

Sample Details

We identified three populations of interest for the study: California housing developers, California city planning commissioners, and California housing advocates. We limit our planning commissioner survey to the 66 California cities with a population of 100,000 or more based on the 2010 Census.

Identifying potential respondents

To select the sample of planning commissioners, the complete list of currently serving planning commissioners was identified using an online search. We randomly selected, using a random number generator, a planning commissioner for each of the 66 cities. A complete list of cities whose planning commissions were sampled can be found in Table 1.

Table 1: Cities (listed in alphabetical order from left to right) from which planning commissioner respondents were randomly sampled (1 commission member randomly selected from each city)

Anaheim	Antioch	Bakersfield	Berkeley	Burbank
Carlsbad	Chula Vista	Concord	Corona	Costa Mesa
Daly City	Downey	El Monte	Elk Grove	Escondido
Fairfield	Fontana	Fremont	Fresno	Fullerton
Garden Grove	Glendale	Hayward	Huntington Beach	Inglewood
Irvine	Lancaster	Long Beach	Los Angeles	Modesto
Moreno Valley	Murrieta	Norwalk	Oakland	Oceanside
Ontario	Orange	Oxnard	Palmdale	Pasadena
Pomona	Rancho Cucamonga	Richmond	Riverside	Roseville
Sacramento	San Bernardino	San Buenaventura (Ventura)	San Diego	San Francisco
San Jose	Santa Ana	Santa Clara	Santa Clarita	Santa Rosa
Simi Valley	Stockton	Sunnyvale	Temecula	Thousand Oaks
Torrance	Vallejo	Victorville	Visalia	West Covina

To access the universe of housing developers in the state, we worked with the California Building Industry Association (CBIA) to create a list of development projects throughout the state and their developers. Using this list, we identified 1,287 developers who had ongoing projects in the 66 sampled cities. We worked with CBIA to develop a feasible population to survey, and CBIA sent the survey link to the 30 developer members comprising about 80% of the state's new housing development.

To develop the universe of housing advocates, we performed an online search, reviewed relevant research studies, and asked several key informants in Northern and Central California for a list of housing advocates. We identified 93 housing advocate organizations through this process though we could find contact information for only 89 organizations. A complete list of housing advocates can be found in Table 2 at the end of the document.

Administering the survey

For the planning commissioner random sample, we either contacted the planning commissioner directly if her/his/their contact information was publicly available on the city website or the planning department if contact information was not publicly available. In a few instances, only phone numbers were listed on the city website; therefore, we called the number and requested to be contacted by email. In the process of distributing the survey link to the 66 randomly selected planning commissioners, we sent out a total of four emails to each planning commissioner or department. The first email with the study description and link to the survey questionnaire was sent in mid-December 2020. Subsequent emails were sent in January 2021 to planning commissions from whom we did not receive a confirmation that the planning commissioner intended to participate or already participated in the survey (i.e., some planning commissioner respondents emailed the study team to confirm the receipt of the link and intention to complete the questionnaire). We collected responses through January 29, 2021.

For the housing developer group, we worked with CBIA CEO Dan Dunmoyer to email the survey link and the study description (provided by the research team) to the 30 developer members whose work comprised about 80% of new housing development in the state. A total of three emails (initial and reminder) were sent to the developer group by CBIA CEO Dunmoyer between mid-December 2020 and late January 2021.

For the housing advocacy group, we emailed the survey link to the contact information publicly available for the housing advocacy organizations. In most cases, the survey link and study description were emailed to the general "contact us" email, and in a few cases, the survey link and study description were emailed to the organization's media contact. A total of four emails were sent, including an initial request and subsequent reminders to finish/take the survey. The first email with the study description and the link to the survey questionnaire was sent in mid-December 2020. Subsequent reminder emails were sent out in January 2021. We collected responses through January 29, 2021.

Survey Details

We created a unique survey questionnaire for each of our populations of interest. The planning commission survey questionnaire contained 37 questions, the developer survey questionnaire contained 32 questions, and the housing advocate survey questionnaire contained 22 questions.

We submitted our questionnaires and study design to the University of Southern California Institutional Review Board (USC IRB) for review and were granted an expedited approval. Each survey questionnaire included a description of the study, including the minimal risks associated with the study design, and that all responses would be anonymous. The respondent had to confirm agreement to participate in the survey before moving forward with the questionnaire.

After receiving USC IRB approval, we were able to pilot test our questionnaires. We shared the questionnaires with CBIA and a former planning commissioner. We also contacted two housing advocacy organizations in the pilot phase but did not receive any response. We asked CBIA and the planning commissioner to also review the advocate questionnaire. Through the piloting, we determined the survey questionnaires took about 10-15 minutes to complete, and that some questions and response categories needed clarification. We revised the questions to be clearer, changed the close-ended responses to reduce confusion, and reordered some questions to improve the narrative flow.

We used the Qualtrics survey platform to create and administer our online surveys. All responses received were anonymous.

Table 2: List of housing advocate organizations and affordable housing developers to whom the survey link was emailed (listed in alphabetical order from left to right)

A Better Way	Affordable Housing Coalition of San Diego
Better Cupertino	California Apartment Association
California Coalition for Rural Housing	California Council for Affordable Housing
California Housing Consortium	California Housing Partnership
California Rural Legal Assistance Foundation	Coalition for Economic Survival Coalition to Protect California Renters
Coalition for San Francisco Neighborhoods	Coalition to Save Parkmerced
Community Housing Partnership	Concilio de Inquilinos: Local 1012
Crenshaw Subway Coalition	East Bay Housing Organizations
Eastern Columbia Homeowners Association	Enterprise Community Partners (a national organization that works in Northern CA)

Eviction Defense Collaborative	Eviction Defense Network
Fair Housing Advocates of Northern California	Fair Housing Council of Central California
Fair Housing Law Project	Faith in the Valley
First Community Housing	Friends of the Neighborhood Integrity Initiative
Good Growth San Carlos	Grassroots Alhambra
Haight Ashbury Neighborhood Council	Housing California
Housing Justice Campaign	Housing Leadership Council of San Mateo County
Housing Rights Center	Housing Rights Coalition
Housing Rights Committee of San Francisco	Housing Rights Committee of San Francisco
Housing Rights, Inc.	Housing and Opportunity Foundation of Kern
Housing is a Human Right	Inquilinos Unidos
Just Cause/ Causa Justa (Bay area)	LA Housing Coalition
LA Tenant's Union	La Miranda neighborhood association
Larkspur Fights Back	Lincoln Place Tenants Association
Livable California	Los Angeles Rent Adjustment Commission
Los Feliz Neighborhood Council	Marin Against Density
Mercy Housing California	Moms for Housing
Natural Resource Defense Council	Nonprofit Housing Association of Northern California
Nonprofit Housing Association of Southern California	Oakland Housing, Residential Rent and Relocation Board
Oakland Tenants Union	Orinda Watch
Palo Altans for Sensible Zoning	Parkmerced Residents' Organization
Project Sentinel	Renters Advocates/Housing Providers
Resist Density	Rural California Housing Company
Rural Community Assistance Corporation (rural communities statewide)	Sacramento Housing Alliance

Sacramento Mutual Housing Association St. Peter's Housing Committee	Sacramento Tenants Union
San Diego Housing Federation	San Diego Renters Union
San Diego Tenants Union	San Francisco Council of Community Housing Organizations
San Francisco Tenants Union	Santa Monicans for Renters' Rights
Save Sunset Junction	Self-Help Enterprises (rural CA, especially the Central Valley)
Sierra Club California	Society for the Preservation of Downtown Los Angeles
Southern California Association of Non-Profit Housing	Stand Up for Neighborly Novato
Strategic Actions for a Just Economy	Tenant Associations Coalition of San Francisco
Tenant Sanctuary of Santa Cruz	Tenants Together
Tenants Union	Tenderloin Housing Clinic
The Alliance for Community Transit-Los Angeles	The California Rural Housing Coalition (they have dozens of members to draw from)
The Venice Stakeholders	United to Save the Mission
Venice Community Housing Corporation	Western Center on Law and Poverty