



CITY of BRISBANE

Affordable Housing Subcommittee Agenda

Monday, July 19th, 2021 at 11:00 AM • Virtual Meeting

This meeting is compliant with the Governors Executive Order N-08-21 issued on June 11, 2021 allowing for deviation of teleconference rules required by the Brown Act. The purpose of this is to provide the safest environment for staff, Subcommittee Members and the public while allowing for public participation. The public may address the council using exclusively remote public comment options.

The Subcommittee may take action on any item listed in the agenda.

TO ADDRESS THE SUBCOMMITTEE

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Email: aibarra@brisbaneca.org

Text: 415-407-2675

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SUBCOMMITTEE MEMBERS:

Mayor Pro-tem Lentz, Councilmember Davis

PRESENTATIONS AND DISCUSSION ITEMS

- A. Discuss the Purpose and Goals for Hiring an Affordable Housing Strategic Consultant
- B. Meet with BAE Urban Economics to Receive their Affordable Housing Strategic Plan proposal

PUBLIC COMMENT**ADJOURNMENT**

File Attachments for Item:

B. Meet with BAE Urban Economics to Receive their Affordable Housing Strategic Plan Proposal

bae urban economics

in collaboration with



PLACEWORKS

Proposal to Prepare an
Affordable Housing Strategic Plan
for the City of Brisbane
July 2, 2021

July 2, 2021

John A Swiecki, AICP, Director
City of Brisbane
Community Development Department
50 Park Place
Brisbane, CA 94005

Dear Mr. Swiecki:

BAE Urban Economics, Inc. (BAE) is pleased to submit the attached proposal in collaboration with PlaceWorks to prepare an Affordable Housing Strategic Plan for the City of Brisbane. Together, BAE and PlaceWorks offer a team that has robust housing policy analysis capability, deep affordable housing economics expertise, and a comprehensive toolbox to foster meaningful community engagement.

BAE is especially well-suited to provide these services to the City, for several reasons. BAE has worked successfully to prepare over 300 housing studies, including Housing Elements, affordable housing inclusionary and linkage fee studies, Affordable Housing and Anti-Displacement Strategies as part of PDA Specific Plans, and residential financial feasibility studies. We have decades of work experience in San Mateo County addressing key issues in affordable housing, public-private partnerships, and transit-oriented development. In addition, we are considered national experts in linkage fee nexus studies, inclusionary studies, and related policy work, demonstrated by our recent City of Los Angeles Affordable Housing Linkage Fee Nexus Study, and our NYC Mandatory Inclusionary Housing Feasibility Study.

We are excited to include PlaceWorks as a subconsultant to implement a comprehensive community engagement strategy for the Strategic Plan. PlaceWorks offers cutting-edge expertise in public engagement strategies and is highly respected for public engagement implementation. BAE and PlaceWorks have a long-standing history of partnering on similar projects and have worked together on over 50 assignments. BAE recently led a team to prepare a housing strategy for the City of Sunnyvale with PlaceWorks as a subconsultant to implement the community engagement program.

San Francisco
2560 9th St., Suite 211
Berkeley, CA 94710
510.547.9380

Sacramento
803 2nd St., Suite A
Davis, CA 95616
530.750.2195

Los Angeles
448 South Hill St., Suite 701
Los Angeles, CA 90013
213.471.2666

Washington DC
1140 3rd St. NE, 2nd Floor
Washington, DC 20002
202.588.8945

New York City
234 5th Ave.
New York, NY 10001
212.683.4486

If you would like any additional information, please do not hesitate to contact me at 510.326.8943, or by email at stephaniehagar@bae1.com. We would like to thank you for your consideration, and we would welcome the opportunity to interview with your team.

Sincerely,

A handwritten signature in black ink, appearing to read 'SH', with a stylized flourish extending to the right.

Stephanie Hagar
Associate Principal

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PROJECT UNDERSTANDING

The City of Brisbane is taking a proactive approach to addressing the City's housing needs by initiating an Affordable Housing Strategic Plan to address several critical interrelated housing issues. The City is in the process of developing a Specific Plan for the Baylands subarea of the City, which will provide approximately 570 acres of land for redevelopment. The Specific Plan is anticipated to allow for development of 1,800 to 2,200 residential units along with up to seven million square feet of commercial development, open space, parks, and trails. The City has recognized the importance of making affordable housing a component of the plan and understands that, as a large-scale redevelopment project, the area presents opportunities to support affordable housing that are unique from those that might be possible on infill sites in Central Brisbane. Accordingly, the City is seeking a feasibility analysis to determine the amount of affordable housing that the plan area can support as well as an evaluation of strategies to foster the production of affordable housing in the plan area. This analysis will need to identify financially feasible affordability requirements while furthering the City's affordable housing goals, including the need to address the City's regional housing needs allocation for the upcoming Housing Element Update cycle.

Meanwhile, the City is considering both how to prioritize use of the City's existing affordable housing funds and how to generate additional revenue for affordable housing. Like many cities, Brisbane lost its major source of affordable housing funds with the dissolution of redevelopment agencies in California. The City is now considering how to best allocate its limited remaining affordable housing funds to address housing needs as well as how to create a longer-term revenue stream to support future affordable housing initiatives. These local affordable housing funds can provide the critical resources that are necessary to provide gap funding for affordable housing developments and to develop local programs that address the City's unique housing needs and priorities. These funds could be used to support key affordable housing initiatives as part of an affordable housing strategy for the Baylands area but would also be considered for uses elsewhere in the City. Because local housing funds are never sufficient to address the totality of a City's affordable housing needs, identifying key expenditure priorities and the most viable funding sources will be critical to the City's ability to support future affordable housing efforts.

Brisbane is also in the final stages of an update to the City's Inclusionary Housing and Density Bonus Ordinance. If adopted, the updated ordinance would allow in-lieu fees for rental developments and adjust the inclusionary requirements for rental and for-sale developments. These changes could create one source of revenue for the City's affordable housing trust fund and could serve as a benchmark for an affordable housing strategy in the Baylands area. As the City considers these other housing issues, the updated Inclusionary Housing Ordinance must be also considered to identify how the updated ordinance could affect and be affected by changes to other City policies.

Together, these changes to the City's housing landscape will have significant implications for the City's responsibilities related to management of deed-restricted affordable housing units. The City currently lacks well-defined procedures for managing deed-restricted affordable units but has only a small number units in its portfolio. New affordable units in the Baylands area will considerably increase the City's deed restricted housing stock, while current and future City affordable housing funds could also lead to an increase in deed-restricted units, depending on how funds are ultimately allocated. This could include new types of deed-restricted units that present new challenges for monitoring and other aspects of management. For example, if the City chooses to pursue a strategy that would create affordable accessory dwelling units on properties owned by private homeowners, this could require new systems for qualifying and monitoring tenants and ensuring access to fair housing that differ from strategies used for multifamily rental developments.

The anticipated increase in deed-restricted affordable housing units in Brisbane will amplify the need for a comprehensive system to administer management responsibilities for these units. As the City continues to increase its affordable housing inventory, effective administration of management responsibilities will be necessary to ensure that affordable units in the City are addressing the City's goals and objectives. Effective management will also help to increase support and acceptance of affordable housing from the community at large, elected and appointed local officials, and developers that are required to provide inclusionary units, which can be vital to the success of the City's future affordable housing efforts. Developing options for managing the City's deed-restricted units will constitute an important component of the City's Affordable Housing Strategic Plan.

BAE's approach to the Brisbane Affordable Housing Strategic Plan will provide thorough economic and policy analysis and ensure meaningful community engagement to create workable strategies that address key housing priorities in the City. BAE's proposed scope of work will emphasize the following:

- **Insightful Economic Analysis.** BAE is nationally recognized for providing strong economic analysis to inform key policy decisions, providing our clients with detailed insight based on real-world economic conditions. We believe that accurate economic analysis is fundamental to creating workable solutions and will thoroughly evaluate the financial feasibility of affordable housing development in the Baylands area as well as the effectiveness of various potential affordable housing trust fund expenditures.
- **Comprehensive Policy Analysis.** Evaluating and developing effective housing strategies is one of BAE's core strengths, grounded in decades of experience with advising public-sector clients on housing policy and implementation. Informed by this experience, our Affordable Housing Strategic Plan will provide a comprehensive

analysis of options for managing affordable housing units, producing affordable housing in the Baylands area, prioritizing expenditures from the City's affordable housing trust fund, generating new sources of City housing funds, and ensuring that the City's updated Inclusionary and Density Bonus ordinance is consistent with other policy changes. The analysis will result in implementable options and recommendations to address the City's housing needs.

- **Meaningful Public Engagement.** We recognize community input as essential for developing implementable recommendations for our clients. We have included PlaceWorks, a leader in fostering community and stakeholder participation in major planning efforts, to lead the public engagement process. Our proposed scope of work includes meeting with community members and the City's Affordable Housing Subcommittee to identify key issues before forming recommendations, then returning to stakeholders to solicit feedback on possible policies and programs.
- **Clear Communication of Findings and Recommendations.** BAE is adept at preparing reports that convey relevant information to elected leaders, executives and other staff, stakeholders, and the general public. We will prepare an Affordable Housing Strategic Plan that clearly documents our methodology, explains our findings, and details key considerations and recommendations.

WORK PROGRAM

This section describes the BAE/PlaceWorks team's proposed scope of work for completing the City of Brisbane's Affordable Housing Strategic Plan.

Task 1: Kick-Off Meeting and Project Management

BAE and PlaceWorks will participate in a project kick-off meeting with City staff to discuss project goals and objectives, confirm the scope of work and schedule, discuss preferred methods for community outreach, and identify materials that are available for the consultant team's review. BAE will prepare an agenda for the kick-off meeting as well as a preliminary schedule and data needs list. After the kick-off meeting, BAE will revise the schedule and data needs list as needed based on feedback from City staff.

This task also includes BAE project management tasks throughout the duration of the project. BAE will communicate with the City staff and the rest of the consultant team on an ongoing basis by phone, email, and meetings as needed throughout the project. BAE's budget for this task assumes that most meetings between the consultant team and City staff will be held virtually and will not require in-person attendance.

Task 1 Deliverables

- *Kick-off meeting agenda*
- *Project Schedule*
- *Data and information request*

Task 2: Identify Affordable Housing Management Responsibilities and Administration Options

In this task, BAE will identify short and long-term management responsibilities for the City's existing and future inventory of deed-restricted affordable housing units and outline options for administering these responsibilities. BAE will identify various management and administrative responsibilities for deed-restricted affordable housing units in Brisbane, including but not necessarily limited to:

- Screening prospective tenants for threshold criteria (e.g., income qualifying),
- Prioritizing prospective tenants based on City criteria (e.g., local live/work preference), if any,
- Annual income qualifying/reporting for tenants in deed-restricted rental units and addressing potential changes in tenancy when an existing tenant no longer qualifies,
- Ensuring that leasing and home sale processes are conducted in accordance with federal, state, and local fair housing requirements,
- Managing and maintaining waiting lists or interest lists for deed-restricted units,
- Overseeing lease-up and management of deed-restricted affordable units,
- Inspecting units to ensure consistency with City standards and advertised features,

- Longer-term monitoring to determine when affordability covenants expire and implementation of preservation efforts,
- Monitoring resale of deed-restricted ownership units, and
- Assessing and collecting any annual monitoring or compliance fees charged to operators of deed-restricted units.

BAE will create a management responsibilities matrix for each unit type (rental and for-sale inclusionary units as well as 100 percent affordable developments) to evaluate the relevant considerations related to management for each type. BAE will then conduct case study research on up to five other jurisdictions to collect information on these jurisdictions' approach to managing deed-restricted affordable housing units, with a focus on cities that are similar to Brisbane. The case study research will identify how each case study city handles administration of various responsibilities and key tradeoffs associated with various approaches. BAE will document the case study research and complete the management responsibilities matrix with options for administration based on the case study research. BAE will then hold a meeting with City staff to discuss various options and obtain feedback from City staff regarding potential approaches. This meeting will include a discussion of the City's capacity to directly administer various management responsibilities and the extent to which the City may choose to work with consultants or other parties to carry out these responsibilities. This process will result in a set of options for administering management responsibilities for the City's deed-restricted affordable housing units along with key considerations related to each option. The analysis and options will be presented in a chapter of the Affordable Housing Strategic Plan report.

Task 2 Deliverables:

- *Inventory of short-term and long-term management responsibilities associated with the City's existing and future inventory of deed-restricted affordable housing units*
- *Summary of case study research*
- *Description of options for administering management responsibilities, including key considerations related to each option*

Task 3: Develop Affordable Housing Strategies for the Baylands Subarea

In this task, BAE will develop affordable housing strategies for the Baylands Specific Plan subarea of Brisbane. This task will include identifying potential affordable housing strategies for the subarea, such as inclusionary requirements for new residential developments, dedication of land to affordable housing developers for construction of 100 percent affordable developments, and developer contributions toward gap funding for 100 percent affordable developments. BAE will then prepare up to four static pro formas to evaluate the financial feasibility of these options in the Baylands Specific Plan area. The pro formas will evaluate the economics of Specific Plan buildout to determine the project's capacity to support various inclusionary ratios and other types of affordable housing contributions. The pro forma models will allow for testing of various affordability ratios and other potential affordable housing

contributions from the Baylands area developer. Based on this analysis, BAE will prepare a set of recommended affordable housing strategies for the Baylands area. Building from Task 1, this task will also include an evaluation of options for managing future deed-restricted affordable units in the Baylands subarea. The analysis and findings from this task will be compiled to form a chapter of the Affordable Housing Strategic Plan report.

Task 3 Deliverables:

- *Evaluation of the feasibility of affordable housing development in the Baylands subarea, including feasible inclusionary requirements*
- *Evaluation of other affordable housing strategies that are appropriate for the Baylands subarea*
- *Evaluation of options for management and administration of affordable units constructed as part of the Baylands project*

Task 4: Identify Goals, Objectives, and Priorities for the Affordable Housing Trust Fund

BAE will identify programmatic funding goals, objectives, and priorities for the City's current affordable housing trust fund balance of approximately \$4 million. As noted in the RFP for this project, options to be considered include, but are not limited to:

- Subsidizing 100 percent affordable housing projects by providing gap financing,
- Providing down payment assistance to homebuyers,
- Issuing grants for accessory dwelling units (ADUs) in exchange for affordability restrictions,
- Providing financial assistance for renters at risk of losing their housing, and
- Acquiring existing deed-restricted affordable housing properties that are at risk of conversion to market rate to preserve affordability.

BAE will consult with City staff and members of City Council and review the City's current housing policies, including the Housing Element, Inclusionary and Density Bonus ordinance, and existing affordable housing funding programs and policies to determine how various options would relate to ongoing City programs and policies. BAE will also consult with City staff to estimate the cost to the City associated with each potential option. BAE will then estimate the impact of each potential funding option, including an estimate of the approximate number of households that each option would serve by income level. This would include:

- Identifying the typical gap funding requirement per unit in a 100 percent affordable development to determine the approximate number of units that the housing trust fund could finance/leverage through affordable housing project subsidies from the trust fund.
- Identifying the magnitude of down payment assistance needed to enable a low-income or moderate-income household to purchase a home in order to estimate the number of households that could receive assistance through a down payment program.

- Estimating the grants needed to incentivize homeowners to adopt affordability restrictions for ADUs and the resulting number of households that could benefit from affordable ADUs.
- Estimating the amount of rental assistance typically needed by renters that are at risk of losing their housing and the resulting number of households that could be served by a rental assistance program.
- Identifying deed-restricted affordable housing properties that are at risk of conversion to market rate and estimating the approximate cost associated with preservation to estimate the number of units that could be preserved BAE anticipates referencing the City's 2023-2031 Housing Element Update to complete this portion of the analysis.
- Conducting similar analysis of other potential programs as appropriate.

For each potential program, this analysis will also identify whether the City's funds would be issued in the form of a grant or could be issued as a revolving loan that would be re-invested into other projects. BAE will present information on each option to City staff, the City Council's Affordable Housing Subcommittee, and City Council, as well in community meetings, to receive feedback on the funding options and inform recommendations.

Findings and analysis from this task will be compiled to form a chapter in the Affordable Housing Strategic Plan report.

Task 4 Deliverables:

- *Interviews with City staff and City Council members*
- *Review of current affordable housing policies and funding programs*
- *Outline and evaluation of current and potential affordable housing funding priorities, include the estimated cost of each strategy and the number of household that each strategy could serve*

Task 5: Evaluate Options to Maintain a Revenue Stream for Affordable Housing Development

BAE will identify and evaluate potential sources of City funding for affordable housing development that are available under current State law. Potential resources might include housing in-lieu fees and commercial nexus fees, local fee waivers, bonds, CDBG funds, enhanced infrastructure financing districts, HOME funds, parcel taxes, ground leases of city-owned sites, property transfer tax, transient occupancy tax, and sales and use tax. BAE will outline the limitations and benefits of each funding source and the feasibility of implementing each funding source to generate revenue for affordable housing development in Brisbane specifically. Based on this analysis, BAE will recommend the most viable options for the City of Brisbane to pursue. Findings from this task will also consider the extent to which each funding source can assist in implementing the potential strategies identified in Tasks 3 and 4 above. The analysis and findings from this task will be compiled to form a chapter in the Affordable Housing Strategic Plan report.

Task 5 Deliverables:

- *Outline of current revenue sources for affordable housing development permitted by State Law, including recommendations that account for the findings and recommendations from Task 3 and 4.*

Task 6: Review Preliminary Updated Inclusionary and Density Bonus Ordinance

For this task, BAE will review the City's draft updated Inclusionary Housing and Density Bonus Ordinance as well as the Planning Commission's recommendations on the ordinance to ensure consistency with the other policy issues addressed in the tasks outlined above. If the review finds that there are potential inconsistencies with any other policy issues addressed in the tasks above, BAE will document these issues and recommend changes to the draft updated Inclusionary Housing and Density Bonus Ordinance as appropriate. Alternatively, BAE may adjust findings and recommendations in other tasks to reflect the draft updated Inclusionary Housing and Density Bonus Ordinance if appropriate. This task would likely occur concurrently with the other tasks in the scope of work to allow for an iterative process that accounts for the updated Ordinance as needed. BAE anticipates that this task would result in a memorandum that presents recommended changes to the draft updated Inclusionary Housing and Density Bonus Ordinance for City staff review, rather than a chapter of the Affordable Housing Strategic Plan itself, though this could be incorporated into the Strategy report if preferred by City staff.

After City staff makes any revisions to the draft ordinance, BAE will review the final draft prior to review by City Council and provide any final recommendations to ensure consistency.

Task 6 Deliverables:

- *Written summary of recommended revisions to the draft updated Inclusionary Housing and Density Bonus Ordinance for consideration by City staff*
- *Review of final draft ordinance prior to review by City Council*

Task 7: Engagement with Community and City Council Affordable Housing Subcommittee

PlaceWorks will lead community engagement and implementation of Task 7 of the project. This scope proposes engagement in two phases. The first phase (Tasks 7.A through 7.D) will focus on developing the community engagement plan and seeking initial feedback on the issues addressed in Tasks 2 through 6. Phase 2 (Tasks 7.E through 7.G) will focus on presenting the community's preferences on these issues and various policy options to the Affordable Housing Subcommittee, the community, and the City Council for review, refinement, and approval.

7.A: Community Engagement Plan

PlaceWorks will prepare a community engagement plan that will specify an approach for conducting meetings with the community, the City Council Affordable Housing Subcommittee,

and the full City Council. The engagement plan will provide goals for engagement, outline proposed meetings for the project, provide potential timing for each meeting, and identify effective outreach channels for engaging the community.

For noticing, PlaceWorks will work with the City to identify opportunities to coordinate with outreach efforts for the Baylands Specific Plan process if possible, such as seeking permission to use existing distribution lists. We will work with the City to identify the most effective engagement methods, which may include flyers and postcards, posting to local newspapers, eblasts, social media, and collaboration with local organizations.

PlaceWorks will share a Draft Community Engagement Plan for City review and incorporate one round of comments to finalize.

As optional tasks for additional cost, PlaceWorks can also:

- Manage a project webpage to announce meetings, provide updates, and post project materials (\$3,500); and/or
- Manage translation services for the project, which would include project materials and support at meetings (\$2,000).

7.B: City Council Affordable Housing Subcommittee Meeting #1

BAE and PlaceWorks will work with the City to prepare and facilitate the first meeting with the City Council Affordable Housing Subcommittee (Subcommittee). The goal of this meeting is to present the Community Engagement Plan and project approach to the Subcommittee and seek initial input on the issues that will be addressed in Tasks 2 through 6.

BAE and PlaceWorks will collaborate to prepare the agenda and meeting materials and will work with the City to determine meeting format (whether it be in-person, virtual, or hybrid).

7.C: Community Meeting #1: Identify Strategies and Funding Priorities

PlaceWorks and BAE will work with the City to prepare for and facilitate the first community meeting for the project. The purpose of this meeting is to broadly engage the Brisbane community to solicit input on the issues that will be addressed in Tasks 2 through 6. The BAE/PlaceWorks teams anticipates that this broad community engagement effort will focus on affordable housing strategies for the Baylands area (Task 3) and goals and priorities for the affordable housing trust fund (Task 4), though the remaining Strategic Plan topics could also be incorporated into the meeting. This meeting will also introduce and provide background about the project.

PlaceWorks and BAE will work with the City to determine the format for the meeting. One option is to host a workshop in the style of an open house where participants can provide feedback at multiple stations. We anticipate the workshop to include the following topics:

- Project background and schedule;
- Identify and evaluate affordable housing strategies and provide input on the ratio of affordable housing units for the Baylands subarea;
- Identify goals, objectives, and priorities for the City's affordable housing fund and options for programming immediately available funds, including but not limited to subsidies for affordable housing projects, homebuyer assistance, ADU construction grants, renter assistance, and/or at-risk property acquisition; and
- Other issues and concerns with affordable housing in Brisbane and the Baylands subarea.

PlaceWorks will identify potential meeting activities to effectively capture input on strategies and priorities, such as ranking exercises, multiple choice activities, post-it boards, and other ways for obtaining both quantitative and qualitative input. PlaceWorks and BAE will coordinate to prepare agenda and meeting materials for the community meeting and PlaceWorks will provide a bullet-point summary of the meeting, including key discussion points and comments.

7.D: City Council Meeting #1: Present Community Feedback

BAE and PlaceWorks will work with the City to attend and prepare for the first City Council meeting to review progress to date on the project. The purpose of this meeting is to present any feedback from the community and the Affordable Housing Subcommittee on the topics that will be addressed in the Strategic Plan as well as initial findings from the analysis that will be conducted during Tasks 2 through 6. In addition, the purpose will be to seek Council feedback and direction on the project based on community input and initial analysis. PlaceWorks and BAE will prepare the agenda and presentation, followed by a bullet-point summary of the meeting.

7.E: City Council Affordable Housing Subcommittee Meeting #2

BAE and PlaceWorks will work the City to prepare for and facilitate the second meeting with the Affordable Housing Subcommittee. The purpose of this meeting will be to present draft options for addressing the topics addressed in Task 2 through 4, which will incorporate feedback received from the community and City Council, and seek direction on next steps. PlaceWorks and BAE will prepare an agenda and meeting materials for the meeting.

7.F: Community Meeting #2: Draft Strategies and Fund Priorities

PlaceWorks and BAE will work with the City to prepare for and facilitate the second community meeting for the project. The purpose of this meeting is to present the draft recommendations for the Affordable Housing Strategic Plan. Similar to Community Meeting #1, the BAE/PlaceWorks team anticipates that this meeting will focus on affordable housing strategies for the Baylands area (Task 3) and goals and priorities for the affordable housing trust fund (Task 4), though other topics could also be included. The format for this meeting can follow a traditional, structured meeting approach with a presentation and town hall-style comment, or it can be an open house format with stations. We will work with the City to determine if this will

be an in-person or virtual meeting. PlaceWorks and BAE will coordinate to prepare an agenda and materials for the meeting. PlaceWorks will provide a bullet-point summary of the meeting to the City and BAE.

7.G: City Council Meeting #2: Present the Affordable Housing Strategic Plan

BAE and PlaceWorks will work with the City to prepare for and attend the second City Council meeting for the project. The purpose of this meeting is to present the draft Affordable Housing Strategic Plan along with key findings from the community engagement process, respond to questions from the City Council and general public, solicit input and feedback, and request Council approval of the Strategic Plan. PlaceWorks will prepare the agenda, meeting materials, and a bullet-point summary of the meeting.

Task 7 Deliverables

- *Community Engagement Plan*
- *City Council Affordable Housing Subcommittee Meetings 1 and 2 agenda and materials*
- *Community Meetings 1 and 2 agenda, materials, and summaries*
- *City Council Full Meetings 1 and 2 agenda and materials*

Task 8: Affordable Housing Strategic Plan Report

BAE will prepare an administrative draft Affordable Housing Strategic Plan report that presents the background information, analysis, findings, and recommendations from Tasks 2 through 7. The draft report will incorporate background materials and analysis from each of the tasks described above and will incorporate feedback received from the community, City staff, the Affordable Housing Subcommittee, and City Council. After submittal of the draft, BAE will convene a teleconference to review the findings with City staff, respond to questions, and receive verbal comments. After the teleconference, the BAE team will respond to one set of consolidated written comments on the draft from City staff to prepare a public review report, which will be circulated to receive public input. At the conclusion of the public input period, the BAE team will produce a final Affordable Housing Strategic Plan report that incorporates input from the community, City staff, and elected and appointed officials.

Deliverables

- *Administrative Draft Affordable Housing Strategic Plan report*
- *Public Review Draft Affordable Housing Strategic Plan report*
- *Final Affordable Housing Strategic Plan report*

PROJECT STAFFING

To complete this assignment, BAE has assembled a highly experienced team that brings expertise in affordable housing policy and community engagement. The BAE Team is comprised of BAE Urban Economics (BAE) as the prime contractor, with PlaceWorks as a subconsultant to lead the community engagement process. BAE and PlaceWorks have a strong history of collaboration on similar projects, having worked together on dozens of planning efforts.

BAE will provide expertise in affordable housing policy and affordable housing economic analysis and will prepare the Affordable Housing Strategic Plan. BAE has extensive affordable housing experience in California and nationwide, having completed over 300 engagements related to inclusionary housing, linkage fees, nexus studies, TCAC LIHTC market studies, local and regional housing strategies, workforce housing development, housing elements and consolidated plans, residential development feasibility studies and pro formas, residential for-sale and rental market studies, community benefits programs (with affordable housing components), and housing cost studies.

For this engagement, BAE's team includes Managing Principal Matt Kowta, who will serve as Principal-in-Charge, and Associate Principal Stephanie Hagar, who will serve as Project Manager. Lisa Varon, Vice President, will serve as a special project advisor to assist with Task 2. They will be supported by Matt Fairris, Senior Associate, and Nyny Vu, Analyst.

PlaceWorks is an award-winning planning and design firm with a strong presence throughout California. PlaceWorks will support the project by leading the community engagement process. The firm has extensive community engagement experience and employs a variety of in-person and online outreach tools—including workshops, focus groups, special events, surveys, and their proprietary, customizable online engagement platform—to elicit creative input and participation from all stakeholders.

PlaceWorks' team for this project will include Charlie Knox, who will serve a Principal in Charge for the community engagement effort, Cliff Lau, who will serve a Project Manager for the community engagement effort, and Michelle Hook, who will serve a key staff for the community engagement effort.

Resumes for key BAE and PlaceWorks staff that will be assigned to this project are shown in the appendix to this proposal.

PROJECT BUDGET

The BAE/PlaceWorks team will complete the work described above for a fixed-fee budget of \$179,375, as shown in the budget provided below. The budget shown below will include all consultant costs, including personnel, overhead, and miscellaneous reimbursable expenses. Miscellaneous expenses such as data purchase and travel are passed through to the client with no markup. BAE reserves the right to re-allocate budget among authorized tasks to best serve project needs; however, in no event shall the total cost exceed the fixed-fee amount, unless the City requests additional work beyond the agreed-upon scope.

	BAE						PlaceWorks					Total	
	Hours by Staff						Hours by Staff						
	Principal	Associate	Vice	Senior	Analyst	Budget	Principal	Associate	Associate	2% Office Expenses	Budget		
	Kowta	Hagar	Varon	Fairris			Vu	Knox	Lau				Hook
	\$310	\$270	\$260	\$195			\$100	\$240	\$140				\$125
Hourly Rate													
1. Kick-Off Meeting & Project Management	10	20	2	10	0	\$10,970	2	2	0	\$15	\$775	\$11,745	
2. Affordable Housing Management & Administration	6	15	12	25	15	\$15,405	0	0	0	\$0	\$0	\$15,405	
3. Affordable Housing for the Baylands Subarea	20	35	0	80	20	\$33,250	0	0	0	\$0	\$0	\$33,250	
4. Housing Trust Fund Goals, Objectives, and Priorities	10	25	0	50	25	\$22,100	0	0	0	\$0	\$0	\$22,100	
5. Affordable Housing Revenue Options	2	8	0	15	10	\$6,705	0	0	0	\$0	\$0	\$6,705	
6. Review Updated Inclusionary/Density Bonus Ord.	2	6	0	12	0	\$4,580	0	0	0	\$0	\$0	\$4,580	
7. Community Engagement	32	48	0	0	0	\$22,880	60	120	96	\$864	\$44,064	\$66,944	
7A: Community Engagement Plan	0	4	0	0	0	\$1,080	4	16	16	\$104	\$5,304	\$6,384	
7B: Affordable Housing Subcommittee Meeting 1	4	6	0	0	0	\$2,860	8	12		\$72	\$3,672	\$6,532	
7C: Community Meeting 1	6	8	0	0	0	\$4,020	12	28	40	\$236	\$12,036	\$16,056	
7D: City Council Meeting 1	6	8	0	0	0	\$4,020	8	12		\$72	\$3,672	\$7,692	
7E: Affordable Housing Subcommittee Meeting 2	4	6	0	0	0	\$2,860	8	12		\$72	\$3,672	\$6,532	
7F: Community Meeting 2	6	8	0	0	0	\$4,020	12	28	40	\$236	\$12,036	\$16,056	
7G: City Council Meeting 2	6	8	0	0	0	\$4,020	8	12		\$72	\$3,672	\$7,692	
8: Affordable Housing Strategic Plan Report	10	20	0	40	10	\$17,300	0	0	0	\$0	\$0	\$17,300	
Subtotal Labor without Optional Tasks	92	177	14	232	80	\$133,190	62	122	96	\$879	\$44,839	\$178,029	
Expenses (mileage and data purchase)						\$1,200					\$146	\$1,346	
Total (Labor + Expenses)						\$134,390					\$44,985	\$179,375	

PROJECT SCHEDULE

The BAE team proposes to complete the City of Brisbane's Affordable Housing Strategic Plan within six months of executing a contract as requested in the RFP for this project and outlined on the schedule below. If selected, the BAE team will work with the City to refine the schedule to meet the City's needs.

Proposed Brisbane Affordable Housing Strategic Plan Schedule

TASK	2021						2022
	Jul	Aug	Sept	Oct	Nov	Dec	Jan
1. Kick-Off Meeting & Project Management							
2. Affordable Housing Management & Administration							
3. Affordable Housing for the Baylands Subarea							
4. Housing Trust Fund Goals, Objectives, and Priorities							
5. Affordable Housing Revenue Options							
6. Review Updated Inclusionary/Density Bonus Ord.							
7. Community Engagement							
7A: Community Engagement Plan							
7B: Affordable Housing Subcommittee Meeting 1							
7C: Community Meeting 1							
7D: City Council Meeting 1							
7E: Affordable Housing Subcommittee Meeting 2							
7F: Community Meeting 2							
7G: City Council Meeting 2							
8: Affordable Housing Strategic Plan Report							

STATEMENT OF QUALIFICATIONS

BAE is well-positioned to provide the City of Brisbane with a comprehensive and insightful Affordable Housing Strategic Plan. BAE has extensive affordable housing policy and technical analysis experience in California and nationwide. Our affordable housing work covers a wide range of topics, making us highly qualified to analyze the key housing issues that the City of Brisbane has identified for the Affordable Housing Strategic Plan and provide options and recommendations to address these issues. We are keenly aware of the factors that make affordable housing policies successful, enabling us to provide implementable options and recommendations to support the City's affordable housing goals.

The pages that follow provide descriptions of a sample of BAE's relevant projects as well as relevant projects completed by PlaceWorks.

Relevant BAE Experience

Sunnyvale Housing Strategy

City of Sunnyvale, CA



The City of Sunnyvale is located in one of the most expensive housing markets in the nation and faces ever-increasing challenges in addressing the full range of housing needs in the City. Meanwhile, recent changes to State law have strengthened the mandate that local jurisdictions ensure the production of affordable units, making it ever more crucial that Sunnyvale consider a broad range of strategies for addressing a wide range of housing needs. In response to these challenges, the City of Sunnyvale commissioned a team led by BAE to analyze housing issues in Sunnyvale, conduct an extensive community engagement process, and prepare a comprehensive housing strategy.

The strategy focused on four main topics that the City identified as key priorities: addressing housing affordability in mobile home parks, improving age-friendliness in housing, Increasing the supply of affordable housing, and enabling households to better afford and maintain housing. The study included data analysis to identify housing needs related to each priority area and presented key tradeoffs associated with potential policies. In addition, the process for preparing the strategy involved an extensive community engagement process, which included roundtable discussions with residential developers and mobile home park owners, community meetings, a series of community open house events, and a pop-up event at the local farmers' market. Findings from the community engagement process informed the strategy recommendations presented in the report for each key priority area. As part of this process, the BAE team assisted the City with an update to its inclusionary housing ordinance, which the City adopted prior to completion of the full housing strategy. The Housing Element was adopted in October 2020.

Innovative Housing Options Study

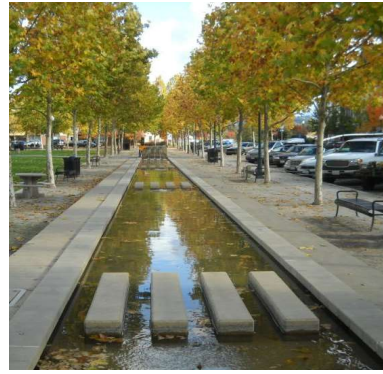
City of West Hollywood



The City of West Hollywood has been known for its proactive approach to addressing housing needs for its residents since its founding. West Hollywood was among the first cities in California to implement rent stabilization and inclusionary housing ordinances in the 1980s. Since then, the City has been at the forefront of championing equitable housing through a suite of progressive policies and programs. The City commissioned BAE to prepare an analysis of innovative housing types and programs, to provide options for the City to further its goal of better housing its diverse population. The study began with an analysis of local demographic and housing market conditions and trends, identifying key housing issues that could be addressed with implementation of innovative workforce and affordable housing models targeted to specific needs. In consultation with City staff, BAE then identified eight different innovative housing types or programs, to serve as the focus for a set of in-depth profiles, including Community Land Trusts, Modular Construction, Micro-Units, Limited Equity Cooperatives, Renovation for Energy Efficiency, Scattered Site Senior Housing with Services, Intergenerational Co-housing, and Artist Housing. For the profiles, BAE conducted a literature review for general background on how the housing type or program has been developed in the U.S.; identified specific case study examples, and collected information regarding, costs funding, and financing; interviewed experts who have been involved with implementation; identified lessons learned and best practices; and determined applicability and recommendations for replicability in the West Hollywood context.

Windsor Inclusionary Housing Policy Update

Town of Windsor, CA



BAE worked with the Town of Windsor to prepare an update of the Town's inclusionary housing policy. While the Town had previously implemented an inclusionary housing program, the Town has not had a substantial amount of new development subject to the ordinance. Those projects that have moved forward have opted to pay the in-lieu fee, rather than construct required affordable units onsite along with the market rate units. The Town Council had expressed concern about this pattern and requested an analysis that will provide the Town with a range of options to consider, with the goal of increasing affordable housing production. BAE analyzed the impact that both market rate housing development and commercial development have on affordable housing need within the town using clear nexus methodologies that have been implemented successfully in numerous other communities. BAE then conducted a financial feasibility analysis which tested the impact of inclusionary requirements on market rate development with the intent of finding the right combination of in-lieu fees that encourage onsite development, contribute adequately to off-side development, and which allows market rate development to remain financially viable. BAE provided a set of recommended revisions to the Town's inclusionary housing program, including updates to the in-lieu fee schedule and inclusionary percentages. Although the Town Council opted not to modify the existing inclusionary and in-lieu fee rates, in light of the recent wildfire impacts on the regional housing stock, BAE also provided additional policy recommendations intended to encourage concurrent production of affordable housing units relative to payment of in-lieu fees, and production of market rate housing units that are more "affordable by design."

BAE's work on the Inclusionary Housing Policy Update was informed by BAE's other work assisting the Town in issuing its first Notice of Funding Availability for Inclusionary Housing Fund monies that the Town had previously generated from in-lieu fees. BAE drafted the NOFA and took the lead in evaluating NOFA responses and recommending two affordable housing projects for the award of just over \$1 million in funding. BAE will also be assisting the Town with a second NOFA process to award an additional \$500,000 in Inclusionary Housing Fund monies.

Plan Area Affordable Housing and Anti-Displacement Strategies

Multiple Cities Throughout the Bay Area



BAE has served as the real estate economist on numerous plans for Priority Development Areas in the Bay Area, most of which have included affordable housing and anti-displacement strategies to address affordable housing needs in the plan area. These include the South San Francisco Downtown Specific Plan, Larkspur SMART Station Area Plan, Walnut Creek West Downtown / BART Station Area Specific Plan, Central Rohnert Park Priority Development Area Plan, Berkeley Adeline Corridor Specific Plan, and Heart of Fairfield Specific Plan. For each affordable housing and anti-displacement strategy, BAE characterized and quantified housing needs in the plan area, identified existing City policies and strategies to address these needs, and recommended new strategies to address housing needs within the plan area. Analysis for these plans included evaluating demographic and housing characteristics in the plan areas as well as the relationship between existing conditions, proposed land use and policy changes, and affordable housing needs. BAE also estimated the existing need for affordable housing in each plan area and the need for additional affordable housing in the area as a component of the buildout of each plan. Each strategy then provided options for each city to address housing needs in the plan area. These included increasing revenue for affordable housing from both traditional and innovative funding sources, implementing inclusionary requirements, dedicating land for affordable housing development, regulating condominium conversions and residential demolitions, strengthening fair housing assistance and tenant protections, adopting community benefits programs and local density bonus ordinances, and facilitating construction of accessory dwelling units, among other strategies.

BAE's work on these plans also included market analysis to ensure that plan alternatives reflected market realities and opportunities, analysis of the financial feasibility of various development prototypes to inform the Plan's regulatory framework, and infrastructure financing strategies that identified appropriate funding sources for the public improvements envisioned in the plans.

Affordable Housing Bond Program and Occupancy Monitoring Fee Studies

City of Los Angeles, Housing and Community Development Department



BAE conducted two concurrent cost recovery fee studies for the Housing and Community Investment Department of the City of Los Angeles' (HCIDLA): Affordable Housing Bond Program (AHBP) and Occupancy Monitoring (OM). The AHBP carries out HCIDLA's responsibilities as the City's primary issuer of multifamily tax-exempt housing bonds. The Occupancy Monitoring unit provides conducts developer, owner, and resident compliance activities.

The AHBP fee study determined the cost of conducting the full scope of multi-family tax-exempt housing bond services and calculated appropriate cost recovery fees. This study analyzed HCIDLA's direct, indirect, and overhead costs associated with the operations of the AHBP. The project also benchmarked AHBP fees and activities within a group of six peer jurisdictions throughout the State and four peer private sector bond issuers. Additionally, BAE determined the cost of HCIDLA's implementation of Federal accessibility mandates and providing occupancy monitoring services. This study's methodology utilized a cost-per-task approach.

Similarly, the OM fee study determined the cost of conducting occupancy monitoring for HCIDLA's portfolio of over 45,000 affordable housing units which is expected to grow to over 50,000 units by 2023. The methodology for this approach was to determine a single three-year projected annual cost per unit based on the projected OM operations income and expenses. Current fee income was accounted for, as was unit types that would be exempted from the fee.

City of Culver City Rent Control Study

City of Culver City, CA



To understand the policy elements and economic impacts of a potential short-term rent freeze, the City of Culver City commissioned BAE Urban Economics, Inc. (BAE) to conduct an interim rent control study. The study included a rental housing market analysis, a survey of urgency tenant protection programs in other jurisdictions, and financial models of multifamily operations based on interviews with local property owners.

BAE presented its findings to the City Council in August 2019, when the body formally adopted an interim ordinance establishing rent control measures for a 12-month period. Staff re-engaged BAE in September 2019 to further study and analyze whether a permanent rent control program was warranted.

For the permanent rent control study, BAE conducted further analysis of the City's existing rental housing inventory, the demographic makeup of its renter households, as well as trends in the local multifamily market following the adoption of the interim ordinance. BAE also surveyed permanent rent control policies and programs in Beverly Hills, the City of Los Angeles, Los Angeles County, Santa Monica, and West Hollywood to help inform program design.

BAE's rent control study highlighted key considerations such as establishing an annual rent cap that allows for a landlord's fair and reasonable return, carving out exemptions for "mom and pop" landlords, and implementing tenant protection policies such as relocation assistance, buy-out procedures, and anti-harassment and eviction guidelines. BAE also created financial models to help establish a capital improvement pass through program that could be implemented under a permanent ordinance, whereby property owners could recapture a portion of eligible property improvement costs over a specified period.

BAE is now working on its third phase of the project, preparing Administrative Guidelines and Procedures for the new rent control staff to address landlords and tenant compliance, complaints, and activities associated with the Rent Control Ordinance.

Napa County Housing Element

Napa County, CA



For the third consecutive Housing Element Update cycle (i.e., 2004, 2008, and 2014), Napa County selected BAE to serve as its prime consultant. The County's 2009 Housing Element Update, which came under intense legal scrutiny, was upheld when the State Appeals Court level and the State Supreme Court declined to review the case. For the 2014-2022 Housing Element Update cycle, the County initially retained BAE to prepare a

detailed Housing Needs assessment, to serve as the foundation for updated policies and programs to address housing needs in the unincorporated area. This involved compilation of updated data regarding local demographics, housing market characteristics, and economic trends and conditions. The Housing Element Update incorporates the findings from an extensive Farmworker Housing Needs Assessment that BAE prepared for the County under a separate contract, which found that while demand continues to be strong for all of the County's available housing facilities for single unaccompanied farmworkers, farmworker labor patterns, immigration enforcement, and changes in agricultural practices have led to increased demand for year-round farmworker family housing. This assessment included over 300 in-person interviews with Napa County farmworkers. Next, the County retained BAE to conduct public outreach and develop updated Housing Element objectives, policies, and programs. This phase of the project involved two community workshops to educate the public about the Housing Element Update process and findings from the Housing Needs Assessment, and to solicit input from the public about local housing issues. In addition to conducting interviews with representatives of a wide range of community stakeholder groups, BAE also implemented an online housing survey in both Spanish and English, to supplement the input received at the community workshops. BAE also worked with staff present the draft for review by the Planning Commission.

BAE was recently selected to prepare Napa County's 2023-2031 Housing Element Update, the fourth consecutive Housing Element Update that BAE will prepare for the County.

City of Los Angeles Affordable Housing Linkage Fee Nexus Study

City of Los Angeles Department of Planning / Housing and Community Investment Department



BAE completed the City of Los Angeles Affordable Housing Linkage Fee Nexus Study in Fall 2016. This landmark work was prepared as three key components: a detailed nexus study for both commercial and residential linkage fees resulting in calculations of maximum legal fee levels by land use, a real estate market analysis used to categorize 144 neighborhoods into low, medium, or high market condition, and a financial feasibility analysis of seven commercial prototypes and four residential prototypes across the market condition categories to test for a maximum feasible fee. The Study also estimated potential annual linkage fee revenues under four proposed Fee Options, which BAE updated in 2017 based on the adopted fee structure. In addition, BAE's work for the linkage fee study provided recommendations for applying the fee to residential Density Bonus projects. Background work included over 20 case studies of cities in California and elsewhere with linkage fee programs, which informed recommendations for implementation of the City of Los Angeles Fee. The process for the study also included BAE organizing and co-facilitating three workshops which invited more than 50 developers, housing advocates, and academics to engage in the study process. The Linkage Fee Ordinance was adopted in December 2017, creating a major permanent funding source for affordable housing.

In early 2020, BAE prepared an updated projection of City of Los Angeles Linkage Fee revenues, based on a detailed analysis of revenue collection to date as well as construction activity since the City's adoption of the fee. The updated fee estimates reflect changes in City policies following adoption of the fee, including policies that incentivize production of affordable units in favor of a fee payment. The study also identified factors that have impacted fee collection during the phase-in process for the fee and near-term estimates of the potential range of fee collection based on the status of the phase-in process and current economic conditions.

Menlo Park Community Benefits Feasibility Analyses

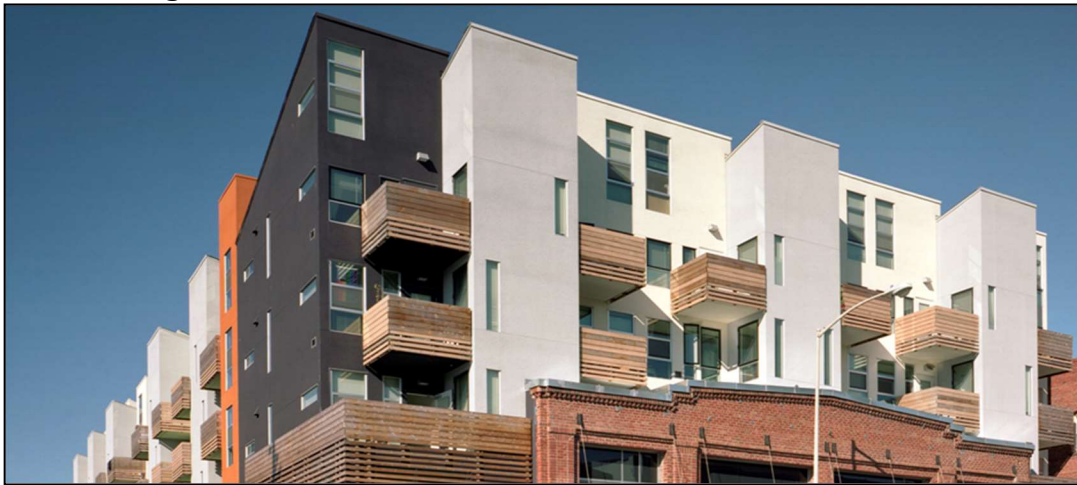
City of Menlo Park, CA

For almost 10 years, BAE has provided development services to support Menlo Park's attraction of new mixed-use development, including evaluating the effects that potential increases in density have on the financial feasibility of numerous projects in Menlo Park. For its El Camino Real/Downtown Specific Plan, the City established a public benefit bonus program that allows developers to construct projects at densities that are higher than allowed under the standard zoning in exchange for public benefits such as affordable housing and community gathering places. BAE has conducted financial pro forma analyses for several projects seeking the public benefit density bonus, including office, residential, and retail uses, to determine the increase in developer profit from a potential bonus award and its relationship to public benefit contributions.

BAE also provided economic analysis for the City of Menlo Park's General Plan Update process, which focused on the City's Bayfront area, home to Facebook and other tech companies. BAE's work included a market analysis to estimate future demand for several land uses and an analysis of the fiscal impacts of the Plan. In addition, BAE conducted financial feasibility analysis to guide the formulation of a community benefits program that allows the city to capture value from the upzoning to finance public improvements and other amenities. BAE's community benefits program analysis included an analysis to determine the share of affordable units that can be included in market-rate residential developments while maintaining financial feasibility, based on the upzoning provided by the new General Plan. More recently, the City has engaged BAE to evaluate proposed community amenity contributions from developers that are pursuing bonus level development based on the community benefits program that the City has adopted in the Bayfront area. BAE's work on these projects has included assessing proposed community amenity proposals to determine if the proposals are appropriate given the increase in project value attributable to the additional density.

Consolidated Plans and Analyses of Impediments to Fair Housing

Dozens throughout the United States



BAE has completed numerous Consolidated Plans and Analyses of Impediments to Fair Housing (a precursor to the Assessment of Fair Housing), both throughout Northern California and across the US. Our work is distinguished by our focus on connecting policy to implementation, based on both a deep understanding of real estate markets and a policy perspective responsive to each community's needs. Hallmarks of all of our work include extensive BAE-led community engagement, clear and up-to-date needs assessments, and comprehensive knowledge of tools and practical implementation strategies.

In Northern California, we have completed Needs Assessments and/or full Consolidated Plans/Five Year Action Plans for the cities of San Francisco, Modesto, Salinas, Stockton, Napa, and Oakland as well as for the Alameda County HOME Consortium. We have also completed Analyses of Impediments to Fair Housing for the City of Napa, the City of Berkeley, the City of Stockton, the City of Redding, the Alameda County HOME Consortium, and San Joaquin County, and a Housing Conditions survey for the City of Oakland's Consolidated Plan/Housing Element.

In other regions of the US, our Consolidated Plan work has included Raleigh, NC; Asheville, NC; and the State of Washington, where we engaged a statewide task force of non-profit organizations to discuss streamlining community development and housing services.

Relevant PlaceWorks Experience

Information about relevant PlaceWorks experience is provided below. In addition to the projects listed in this section, PlaceWorks led the community engagement process for the Housing Strategy that BAE recently prepared for the City of Sunnyvale, as described above.

Gilroy TOD Visioning Process

Santa Clara Valley Transportation Authority

PlaceWorks was hired by the Santa Clara Valley Transportation Authority (VTA) to lead community engagement for a master plan envisioning process of the VTA Gilroy Station area in downtown Gilroy, California. The goal of this project was to educate the community about an upcoming affordable housing development project, and to identify project priorities and desired amenities by residents and stakeholders to inform future Request for Offers (RFO) for development of the site. PlaceWorks collaborated with local community activists hired by VTA, Rebecca Garcia and Jorge Mendoza, to organize and implement community engagement and visioning. The station site is adjacent to a Spanish-speaking community of Gilroy and this project engaged intensively with both the English- and Spanish-speaking communities. For this project, PlaceWorks prepared conceptual site plans and organized two rounds of community meetings in both English and Spanish. The project resulted in high turnout of English-speaking, Spanish-speaking, and participants of other languages and ethnicities which led to rich and direct input from the Gilroy community. PlaceWorks documented feedback and findings in a final report to inform future development solicitations by VTA for the site.

Solano Housing Investment Partnership

Solano Transportation Authority

PlaceWorks is facilitating and assisting this partnership among Solano's eight local agencies to partner and the Solano Transportation Authority to accomplish the following goals:

- Create and categorize an inventory of housing sites, with a focus on catalyst housing sites within Priority Development Areas (PDA) to develop strategies to move these projects towards development;
- Examine policy options available for Solano's seven cities and Solano County (including best practices) that want to provide for more housing options and meet their RHNA targets;
- Identify and examine public and private funding sources; and
- Develop strategies to move these projects toward development.

The effort involves:

- 1) Developing an inventory of potential housing sites in all seven cities and unincorporated Solano County. The sites will be categorized by tiers, with tier 1 being fully entitled sites, tier 2 being sites that could be developed in the short-term (one to

- three years) with predevelopment work and/or infrastructure investment, and tier 3 sites being those that could be developed in the longer term (three years and beyond).
- 2) Examining policy options, using case studies and best practices, to identify potential zoning, development review processes, development fee changes, and other policy areas that could be implemented to spur additional housing development.
 - 3) Identifying and summarizing potential public and private funding sources that can be accessed to help create additional housing opportunities, specifically affordable housing located in PDAs adjacent to regional transit service.
 - 4) Providing technical assistance to cities that need support to address state and regional housing requirements and to submit for regional and state funding programs and countywide coordination with the Association of Bay Area Governments (ABAG), HCD, the Strategic Growth Council (SGC), and other relevant agencies.
 - 5) Developing product type, conceptual design criteria, and project feasibility to encourage housing and mixed-use development in each community's downtown area.

Strategic Plan Update

San Mateo County Transportation Authority (SMCTA)

In this Countywide effort to update the 5-year Strategic Plan, PlaceWorks is providing a combination of agency facilitation and community outreach services. PlaceWorks Principal Charlie Knox facilitates regular meetings of two groups: (1) local municipal and agency technical representatives, primarily including public works directors and also city managers and assistant city managers, and (2) County, agency and non-profit advocates for active transportation, transit, transit-oriented development, housing, social equity, and related objectives. PlaceWorks prepares informational materials for these meetings and also is responsible for conducting broad and inclusive countywide outreach targeting current and potential transit users, including non-English-speaking communities, and transit-dependent populations. PlaceWorks is the lead responsible party for in-person events at locations distributed throughout the County, as well as for online surveys and comment forums optimized for desktop, laptop, tablet, and mobile devices.

Redwood City Ferry Feasibility Study for the City of Redwood City

PlaceWorks led stakeholder and community outreach in this effort to determine whether ferry service to and from San Francisco and the East Bay could become a viable alternative to other modes of regional travel. Focused meetings with the Port of Redwood City, water users, and local employers were complemented with community engagement to gauge feasibility. An online survey, pop-up events, and e-blasts provided needed input, including regarding whether roadway transit connections to the ferry could offer valuable first and last mile service for both ferry users and the overall traveling public.

REFERENCES

Joint BAE & PlaceWorks Reference

Trudi Ryan

Community Development Department Director, City of Sunnyvale

P: 408.730.7435

E: tryan@ci.sunnyvale.ca.us

Additional BAE References

John McDowell

Supervising Planner, County of Napa

P: 707-299-1354

E: John.McDowell@countyofnapa.org

Claudia Monterrosa

Chief Housing Officer, City Homelessness Initiatives, Office of Los Angeles Mayor Garcetti

(formerly Housing + Community Investment Division, City of Los Angeles)

P: 213.808.8650

E: claudia.monterrosa@lacity.org

Additional PlaceWorks References

Jessie O'Malley Solis

Transit-Oriented Development Program Manager, Santa Clara Valley Transportation Authority

P: 408-321-5950

E: Jessie.O'MalleySolis@vta.org

Joel Slavit

San Mateo County Transportation Authority

P: 650.508.6476

E: slavitj@samtrans.com

APPENDIX: RESUMES OF KEY STAFF

bae urban economics

Matt Kowta, MCP Managing Principal



Education

Master of City Planning,
UC Berkeley

Bachelor of Art,
Geography, UCLA

Professional Experience

For over 25 years, Matt has pioneered innovative techniques in economic analysis to meet the challenges of contemporary urban development. Matt oversees BAE operations spanning all of BAE's offices, supporting clients with expertise in development feasibility and market analysis, affordable and workforce housing, public finance and fiscal impact, and strategic economic development.

Matt has managed numerous studies relating to affordable housing, workforce housing, inclusionary housing policies, and housing impact analyses. He also has extensive experience modeling development feasibility for housing ranging from single-family and townhouses to high density multifamily projects. Matt recently served as BAE's principal-in-charge for fine-grained analysis of demand for housing in Central Sacramento, and for major affordable and workforce housing studies in the Lake Tahoe region, including the Truckee/North Tahoe Regional Housing Needs Study, and an affordable housing policy study for the Tahoe Regional Planning Agency. Matt is currently leading BAE's work assisting Palm Beach County, Florida with a workforce housing program update.

Matt has managed other projects in diverse locations ranging from the San Francisco Bay Area to Southern California, Oregon, Washington State, and Colorado. His experience spans the full continuum of the development process, from long range planning and pre-development through redevelopment and revitalization.

Housing Strategy

City of Sunnyvale
Workforce and Affordable
Housing Needs
Assessment, Analysis of
Special Housing Topics,
Policy Analysis

Inclusionary Housing Policy Update

Town of Windsor,
California

Housing Needs Analysis,
Policy Development, and
Development Feasibility
Analysis

Truckee North Tahoe Workforce Housing

Town of Truckee,
California

Housing Needs Analysis,
Best Practices, Strategy
Development

Innovative Housing Options Study

City of West Hollywood,
California

Housing Needs Analysis,
Workforce and Affordable
Housing, Policy
Development

Inclusionary Housing Policy Update

City of Sacramento,
California

Market Analysis, Housing
Needs Analysis, Financial
Feasibility Analysis

bae urban economics

Stephanie Hagar, MCP

Associate Principal



Professional Experience

Stephanie provides strong leadership and project management to BAE engagements throughout the western US. She has extensive experience in affordable housing policy and financial feasibility analysis, along with deep expertise in fiscal impact analysis and market studies to support major land use plans.

Education

Master of City Planning, UC Berkeley

Bachelor of Art, Psychology, UC San Diego

Stephanie has completed numerous workforce and affordable housing strategies and policy studies. She recently served as project manager for the preparation of a Housing Strategy for the City of Sunnyvale, preparing analysis of a range or unique housing issues and framing options for consideration by the public, City staff, and elected officials. She has completed Housing Element Updates for the cities of Milpitas and Concord, analyzing housing needs, identifying potential housing development sites, evaluating programs and policies, and leading public engagement activities. Stephanie is currently serving as Project Manager for the City of Davis Housing Element Update and the Mountain View Housing Element Update. Her other housing policy work has included affordable housing and anti-displacement strategies for TOD plans in Walnut Creek, Rohnert Park, Fairfield, and South San Francisco.

Stephanie also offers strong expertise in development feasibility analysis. Stephanie recently served as the project manager for analyses of the financial feasibility of inclusionary housing requirements in Napa and Menlo Park. She has also evaluated the financial feasibility and developer profit potential for several projects in Menlo Park, including mixed-income residential uses.

Housing Strategy

City of Sunnyvale
Workforce and Affordable Housing Needs Assessment, Analysis of Special Housing Topics, Policy Analysis

Housing Element Update (in progress)

City of Mountain View
Housing Needs Analysis, Housing Policy Development

Residential and Commercial Linkage Fee Nexus Study and Revenue Estimate

City of Los Angeles
Affordable Housing Need Analysis and Policy Development, Linkage Fee Revenue Estimate

Inclusionary Housing Economic Study

City of Napa
Inclusionary Housing Financial Feasibility Analysis, Affordable Housing Policy Advisory

South San Francisco Downtown Station Area Plan

City of South San Francisco
Market Analysis, Financial Feasibility Analysis, Affordable Housing Strategy, Financing Plan

bae urban economics

Lisa Varon
Vice President



Education

Master of Arts,
Urban Planning, UCLA

Bachelor of Arts,
English, UCLA

Professional Experience

For over 25 years, Lisa has developed and implemented high-quality affordable housing and human services programs. Lisa offers our BAE client engagements with extensive experience in acquisitions, feasibility, project management, and compliance for locally-funded, LIHTC and HUD-financed housing. For BAE, Lisa has reviewed LA Metro unsolicited developer proposals for mixed-use and 100 percent affordable projects in Los Angeles, Westlake, Watts and Duarte.

Lisa is currently working on Housing Elements for the cities of Irwindale and Rancho Palos Verdes, the Weingart Towers high-rise permanent supportive housing loan closing, the Highway 111 Corridor Specific Plan in Indio with a focus on housing siting, and a City of Los Angeles affordable housing site.

At the City of Santa Monica, Lisa personally underwrote, closed and managed over \$100 million-dollar value of Citywide Housing Trust Fund Loans (HTF), structured public-private sector partnerships, restructured deed-expiring properties, and developed an affordable housing compliance monitoring program. She served on the HTF loan committee, approving City loans up to \$25 million with staff ministerial authority for the development, resulting in the development of over 700 units of affordable housing. Lisa has worked in business development and project management for several nonprofit developers, including Abode Communities, Community Corporation of Santa Monica and LA Housing Partnership. She has conducted affordable housing feasibility assessments, including financing, entitlements, parking and risk, for properties located in over a dozen Southern California jurisdictions. Lisa served on the LA County inaugural MHSA Housing Advisory Committee and the Santa Monica Redevelopment Successor Agency.

LA Metro Joint Development Real Estate Advisory

Los Angeles, CA
Real Estate Advisory, Feasibility Analysis, Pro Forma Review, Affordable Housing, Mixed Use Development

San Gabriel Valley Regional Housing Trust Strategic Plan

San Gabriel Valley, CA
Housing Needs Assessment, Best Practices, Funding Strategies, Stakeholder Engagement, Pipeline Analysis, Strategic Planning

City of Culver City Temporary and Permanent Rent Control Ordinances

Culver City, CA
Public Policy Analysis, Rental Market Analysis, Capital Improvement Pass-Throughs

Santa Monica Citywide Housing Trust Fund

Santa Monica, CA
Feasibility Analysis, Affordable Housing Finance, Disposition, Housing Policy, Asset Management, Compliance Monitoring

Santa Monica Redevelopment Successor Agency

Santa Monica, CA
Served as one of six board members charged with overseeing the disposition of \$750 million in former RDA assets.

bae urban economics

Matt Fairris, MCP
Senior Associate



Education

Master of City Planning,
UC Berkeley

Bachelor of Science,
Environmental Policy
Analysis and Planning,
UC Davis

Professional Experience

Matt Fairris is a Senior Associate in BAE's Sacramento Region office, where he provides research and analytical support for BAE's consulting assignments throughout Northern California. He specializes in market analyses, housing needs assessments, and affordable housing feasibility analyses.

His recent experience includes housing needs and affordable housing strategic plans for San Mateo County, Placer County, the City of Vacaville, and the Truckee-North Tahoe Region. Matt also recently conducted a housing needs assessment and affordable housing funding strategic plan for a new regional housing trust in Los Angeles County. He also recently conducted real estate market analysis and financial feasibility analysis in support of public sector affordable housing site dispositions, including the State of California Excess Sites program, Alameda County's Broadway Sites, and several VTA-owned sites, among others. He also recently created a series of affordable housing community profiles of several jurisdictions throughout Alameda and Santa Clara counties.

Matt earned his BS in Environmental Policy Analysis and Planning from the University of California, Davis, and his Master of City Planning (MCP) from University of California, Berkeley. During his time at UC Berkeley, Matt was part of the winning team in the Bank of America Low-Income Housing Challenge and the Big Ideas competition, both focusing on the provision of affordable housing.

Farmworker Housing Needs Assessment

County of San Mateo
Market Analysis; Housing
Needs Assessment;
Strategy Development

Housing Strategy and Development Plan

County of Placer
Housing Needs
Assessment; Vacant
Land Inventory; Finance
Strategy

Regional Workforce Housing Needs Assessment

Truckee-North Tahoe, CA
Housing Needs
Assessment; Regional
Market Analysis; Strategy
Development

Broadway Sites Disposition

County of Alameda
Real Estate Market
Analysis; Financial
Feasibility Analysis; Site
Disposition Strategy

Excess Sites Disposition

State of California
Affordable Housing
Needs Assessment;
Financial Feasibility
Analysis; Site Disposition
Strategy



CHARLIE KNOX, AICP

Principal

Charlie has almost 30 years of experience in public and private sector transportation planning leadership. He has a deep understanding of how to manage and coordinate agency and consultant efforts, and how to apply transportation innovation to serve agency staff and officials and the communities they serve. Charlie's expertise includes shepherding high-profile projects to approval and ensuring meaningful community input to inform transportation solutions. He is currently assisting numerous transit agencies with services ranging from project development and entitlement to environmental review to route and other program updates. Similar project experience includes Santa Clara Valley Transportation Authority, Contra Costa Transportation Authority, West Contra Costa Transportation Advisory Committee, Monterey-Salinas Transit, and the San Mateo County Transportation Authority. Prior to joining PlaceWorks, Charlie served as a municipal Public Works Director and Community Development Director.

HIGHLIGHTS OF EXPERIENCE

TRANSPORTATION PLANNING

- » West Contra Costa County Express Bus Implementation Plan, Contra Costa County CA
- » Contra Costa Transportation Authority On-Call Planning, Contra Costa County CA
- » Santa Clara Valley Transportation Authority (VTA) On-Call Planning, Santa Clara County CA
- » Central Contra Costa Transit Authority (County Connection) On-Call Planning, Contra Costa County CA
- » Salinas Valley Express Transit Corridor Planning Study, Monterey County CA
- » Monterey-Salinas Transit Bus Rapid Transit, Monterey County CA
- » San Mateo County Transportation Authority Strategic Plan Update, San Mateo County CA
- » El Camino Real Safety Improvements, Burlingame CA
- » Belmont TDM Implementation, Belmont CA

ENTITLEMENTS

- » Fourth and University Project, Berkeley CA
- » Bayside Village Project, Hercules CA
- » Santa Clara Valley Transportation Authority (VTA) Transit-Oriented Development (TOD) Entitlement, Santa Clara County CA
- » Mountain Village Subdivision (Now Incorporated), Telluride CO
- » Aldasoro Ranch Subdivision, Telluride CO
- » Lawson Hill Mixed-Use and Affordable Housing Subdivision, Telluride CO
- » Telluride Ski Area Expansion, Telluride CO

COMPREHENSIVE PLANNING

- » Menlo Park General Plan and Zoning Update, Menlo Park CA
- » Stockton 2035 General Plan Update, Stockton CA
- » Vallejo Integrated Revitalization Program and Comprehensive General Plan Update, Vallejo CA

EDUCATION

- » MA, Communications, University of Washington, Seattle WA
- » BA, English, Whitman College, Walla Walla WA

CERTIFICATIONS

- » American Institute of Certified Planners

AFFILIATIONS

- » American Planning Association
- » Bay Area Planning Directors Association

Team member since 2013

CHARLIE KNOX

Principal

cknox@placeworks.com

- » Livermore Housing Element Implementation and Environmental Review, Livermore CA
- » Marin Countywide Plan, Marin County CA
- » Ventura General Plan, San Buenaventura CA
- » Pleasant Hill General Plan, Pleasant Hill CA
- » Morgan Hill General Plan, Morgan Hill CA
- » Citrus Heights General Plan, Citrus Heights CA
- » Cotati General Plan Background Report, Cotati CA
- » Sonoma General Plan and EIR, Sonoma CA

SPECIFIC PLANS AND ZONING

- » Oroville Sustainable Code Update and Climate Action Plan, Oroville CA
- » Marinship Specific Plan Assessment and Evaluation, Sausalito CA
- » Benicia Downtown Mixed Use Master Plan, Benicia CA
- » Cotati Downtown Specific Plan, Cotati CA
- » Morros Area Specific Plan, San Luis Obispo County CA
- » San Miguel County Land Use Code, San Miguel County CO

MUNICIPAL ADMINISTRATION

- » Benicia Strategic Plan, Benicia CA
- » City of Benicia/Solano County GIS Data-Sharing Platform, Benicia CA

PUBLIC WORKS PROJECTS

- » Benicia/Martinez Bridge-Bay Area Ridge Trail Connector, Benicia CA

SUSTAINABILITY INITIATIVES

- » Sustainable Communities Strategy Base-Case Scenario and Implementation Project, Monterey Bay Area CA
- » Vulnerability Assessment and Adaptation Plan, Benicia CA
- » Renewable Energy and Conservation Project, Benicia CA
- » Valero Benicia Refinery Flue Gas Scrubber, Benicia CA
- » Valero/Good Neighbor Steering Committee Settlement Agreement, Benicia CA
- » Benicia Boatyard Marine Debris Cleanup, Benicia CA

PUBLICATIONS

- » "The Ethics of Connected Autonomous Vehicles," Talk ITS, Winter 2018
- » California General Plan Glossary, Governor's Office of Planning and Research, 1991

SPEAKING ENGAGEMENTS

- » Panelist, "The Future of Smart Cities," Redefining Mobility Summit, San Ramon, CA 2017
- » The Ethics of CAVs, GRIDSMART 2017, Knoxville, Tennessee
- » "Planning 2.0: The Drivers of Regional and Global Change and Land Use Innovation," Plenary Lunch, 2015 APA California Annual Conference, Oakland CA
- » "Company Town 2.0: How Facebook and Google are Rethinking the Corporate Campus," Mobile Workshop, 2015 APA California Annual Conference, Oakland CA
- » The Elephant NOT in the Room: Documenting the Silent Majority, 2014 League of California Cities Annual Conference, Los Angeles

LEADERSHIP & COMMUNITY

- » Bay Area Planning Director's Association, Steering Committee Member, 2006 to Present
- » Association of Bay Area Governments, Regional Planning Commissioner, 2009 to 2011

TEACHING

- » "GIS for Planners," Cal Poly San Luis Obispo, 2000 to 2003



CLIFF LAU

Associate

Cliff has a diverse range of experience in the areas of urban design, community planning, and engagement. He focuses on planning and design oriented towards communities, the environment, health, and the public realm. Cliff possesses a valuable skillset, bringing high-quality coordination and design to his portfolio of projects. His technical skills include graphic design, illustration, hand drawing, and GIS mapping. He has produced planning documents, design visualizations, maps, and design guidelines to envision community development projects and Specific Plans. Cliff is committed to creating clear, accessible, and high-quality products to support the success of projects.

HIGHLIGHTS OF EXPERIENCE

URBAN DESIGN

- » Southeast Greenway GPA, Rezoning, and EIR, Santa Rosa CA
- » Southwest Fresno Specific Plan, Fresno CA
- » 1140 Wildcat Canyon Road Expedited Planning Services, Berkeley CA
- » Downtown Willits Streets and Alleys Connectivity Study, Willits CA
- » AMBAG Sustainable Communities Strategy Implementation Project, Monterey County CA
- » SANDAG Smart Growth Visual Simulations, San Diego CA
- » Downtown Livermore Facilitation Project, Livermore CA
- » Palmdale to Burbank High Speed Rail Environmental and Engineering Services, LA County CA

COMMUNITY OUTREACH

- » Los Angeles County Parks and Recreation Needs Assessment, LA County CA
- » Palo Alto Comprehensive Plan Amendment, Palo Alto CA
- » San Mateo County Transportation Authority Strategic Plan Update, San Mateo County CA
- » SamTrans 101 Express Bus Plan, San Mateo County CA
- » Sunnyvale Housing Strategy, Sunnyvale CA
- » SB 1000 Implementation Toolkit, Oakland CA

VISUAL IMPACT ASSESSMENT

- » Livermore Community Solar Farm EIR, Livermore CA

PRIOR EXPERIENCE

- » Okamoto Saijo Architecture, San Francisco CA
- » Envision Transform Build East Palo Alto, East Palo Alto CA
- » Redstone Townhomes Neighborhood Association, Jersey City NJ
- » Healthy Development Guidelines Technical Advisory Group, Oakland CA
- » 2012 Downtown Berkeley Design Guidelines, Berkeley CA

EDUCATION

- » Master of Urban Design, University of California, Berkeley
- » Bachelor of Architecture, New Jersey Institute of Technology

AFFILIATIONS

- » American Planning Association
- » Planners Network

Team member since 2015



MICHELLE HOOK

Associate

Michelle is drawn to the field of landscape architecture for its multi-disciplinary and systems thinking approach, which fuses her background in biology and environmental advocacy work with her creative interests and fascination for the built environment. Michelle is dedicated to generating thoughtful and context specific design solutions that enhance our natural systems and processes, along with the site's unique ephemeral qualities.

Michelle enjoys working in collaborative multidisciplinary teams where design collaboration promotes a synthesis between our urban infrastructure, architecture and environment. She brings forth her rendering and story-telling visual skills along with her strong plant, material and construction knowledge into all project phases. Michelle's practice is continually inspired and invigorated by asking questions, which reflect contemporary culture, current environmental challenges, and the needs of communities and individuals.

EDUCATION

- » Master of Landscape Architecture
University of California, Berkeley
- » BS, Biological Sciences
University of California, Davis

AFFILIATIONS

- » Design Review Board Member, City of Richmond
- » ReScape Qualified Professional (RQP)

Team member since 2018

HIGHLIGHTS OF EXPERIENCE

PARKS AND TRAILS

- » Sanborn Conceptual Park Use Plan, Saratoga CA
- » Kelley Park Master Plan Update, San Jose CA
- » Foster City Recreation Center and Park Master Plan, Foster City CA

STREETScape IMPROVEMENTS

- » Richmond Wellness Trail, Richmond CA
- » East 14th Street Streetscape Project, Alameda County CA

EDUCATIONAL FACILITIES

- » Markham Elementary Schoolyard Greening Project, Oakland, CA
- » Family Harvest Farm Site Planning Assistance, Pittsburg CA

PLANNING IMPLEMENTATION AND OUTREACH

- » Moraga Center Specific Plan Implementation Project, Moraga CA
- » Los Angeles River Ranger Program Establishment Plan, Los Angeles CA
- » California Indian Heritage Center, Sacramento, CA
- » Cal State San Bernardino, WaterTalks Community Events, Los Angeles County, Santa Clara County, and Ventura County CA

VISUAL SIMULATIONS

- » Terra Vi Lodge, Tuolumne CA
- » Lower Walnut Creek Restoration Area, Martinez CA

PRIOR EXPERIENCE

CLIFF LOWE ASSOCIATES | LANDSCAPE DESIGNER

Contributed to in-fill and TOD projects across the Bay Area. Supported principle throughout all design phases.

UC BERKELEY COLLEGE OF ENVIRONMENTAL DESIGN | IN[LAND] STUDIO INSTRUCTOR/LECTURER

Lectured at the [IN]LAND program at UC Berkeley, which introduces students to the fundamentals of landscape architecture. Collaborative studio environment and hands-on training are key points of the program.

AWARDS

» 2016 ASLA Communications Award, GROUND UP, Issue 05, Delineations.
Co-editor-In-Chief

**MICHELLE HOOK**

Associate

mhook@placeworks.com