



STAFF REPORT

City Council

Meeting Date:

3/23/2021

Staff Report Number:

21-065-CC

Regular Business:

Authorize the city manager to negotiate a scope of work and fee and execute an agreement with the M-Group for the housing element (2023-2031) update and related work

Recommendation

Staff recommends that the City Council authorize the city manager to negotiate a scope of work and fee, not to exceed \$982,000, and execute a contract with the M-Group for the housing element (2023-2031) update and related rezonings, and the preparation of an environmental justice element, safety element update, Fiscal Impact Analysis and environmental impact report.

Policy Issues

The components of the housing element update will consider a number of land use, environmental and housing policies.

Background

Under California law every jurisdiction in the State is required to update the housing element every eight years and have it certified by the California Department of Housing and Community Development (HCD.) The housing element is one of seven State-mandated elements (or topic areas) of a General Plan for all jurisdictions in California, and requires local governments to adequately plan to meet their existing and project housing needs for all income levels. The City's current housing element was last adopted in April 2014 and covers the planning period from 2015-2023. The next cycle's deadline for jurisdictions in the Bay Area, which is set by HCD, is January 2023, and covers planning period for 2023-2031.

Recognizing the complexity, importance and time-intensive nature of the housing element process and its related work, the City Council unanimously supported the initiation of the housing element as one of its top five project priorities for fiscal year (FY) 2020-21 August 18, 2020. Subsequently, on November 10, 2020, the City Council amended the FY 2020-21 budget by \$1.69 million for the housing element and its work related. This expenditure includes up to \$1.5 million for the project components and the partial-year funding for 2.0 full-time equivalent (FTE) personnel, including recruitment for the community development director position. The City Council has continued to express support for the housing element as a priority, most recently during its discussion on goals and priorities March 9, 2021.

The housing element must be consistent with the City's general plan and updated for compliance with State law and include City goals, policies and implementing programs to facilitate the construction of new housing and preservation of existing housing to meet the needs across all economic levels of the City. The City's anticipated housing allocation for the next planning period is approximately 3,000 units, which is a 358 percent increase from the last housing element cycle. Menlo Park is not alone in seeing a large increase in

its housing allocation. The project is complex and is anticipated to consist of multiple components, including the following:

- Conduct robust public engagement process to ensure that the project reflects the community's goals and values;
- Update the housing element, including addressing affirmatively furthering fair housing (AFFH) and other State mandates;
- Amend the land use element, the zoning ordinance and/or rezone property to demonstrate compliance with the City's regional housing needs allocation (RHNA);
- Develop an environmental justice element (SB 1000) to advance equity and address potential environmental health risks in the City;
- Update safety element to address climate adaptation and resiliency strategies in compliance with State law (SB 379); and
- Prepare a fiscal impact analysis and environmental impact report to inform the public and decision-makers of potential financial and environmental impacts of the project.

The housing element update process must be inclusive, and develop policies and programs that are measurable and achievable. This update process is an opportunity to take a deeper dive at historical land use practices and look toward the future through a lens of equity and sustainability while still achieving a certified housing element.

Analysis

Consultant selection process

Choosing the right consultant to lead this effort is a key first step. The consultant team must not only be subject matter experts, but also be able build trust, effectively communicate ideas, and use innovative strategies to engage a diverse set of community stakeholders. In December 2020, staff issued a request for qualifications (RFQ) to seek a "prime consultant" to work with the City to assemble and manage a team of qualified subconsultants to accomplish the project. The City received statement of qualifications from two highly qualified firms and then requested proposals from each firm. The housing element update consultant request for proposals (RFP) is included as Attachment A. In February 2021, the City Council authorized the creation of a housing element interview panel, which represented varied community interests and perspectives from the City Council, Commissions and staff. The objective of the interview panel was to provide a recommendation on a preferred consultant to the City Council. The panel was comprised of the following members:

- City Councilmember Cecilia Taylor
- City Councilmember Jen Wolosin
- Planning Commission Chair Henry Riggs
- Planning Commissioner Chris DeCardy
- Housing Commission Chair Karen Grove
- Deputy Director of Community Development – Housing Rhonda Coffman
- Assistant Community Services Director Adriane Lee-Bird

The panel interviewed each firm and subsequently sought additional information from each firm based upon aspects of their proposal and a need to dive deeper into key topic areas. Each team brought great experience and different strengths, making a recommendation very difficult. The panel believed that additional community input would be valuable in the process, and follow-up meetings with the firms were

scheduled. The following members formed the smaller interview group, which participated in a focus group exercise with each firm:

- City Councilmember Taylor
- City Councilmember Wolosin
- Planning Commissioner Michele Tate
- Pastor Arturo Arias

Following the exercise, the smaller group recommended the M-Group as the preferred consultant for not only their experience, but also their new perspectives it could bring to the process. The group also highlighted areas of the scope that should be enhanced and further developed as staff negotiates the scope of work, keeping in mind the overall budget. The two key areas are public engagement and the creation of an advisory committee, which are discussed in more detail in the proposed scope of work and budget section below.

Proposed scope of work and budget

The project is proposed to be led by the M-Group, who will manage a number of subconsultants to provide technical expertise for the various components. Table 1 identifies the consultant team members proposed by the M-Group and Attachment B is the draft scope of work that was included in the firm’s proposal. The proposed fee, inclusive of a 10% administrative fee for managing subconsultants and a 10 percent contingency fee to be used only with City approval, is \$982,011. The proposal also includes a variety of optional items for an all-inclusive fee total of \$1,195,216. By comparison, the proposal submitted by Baird + Driskell totaled \$799,101 without a contingency or administrative fee.

Table 1: Consultant team	
Consultant	Project components
M-Group	Lead consultant; housing element, environmental justice element and safety element
ESA	Environmental impact report
Hexagon	Transportation (EIR)
BAE	Fiscal impact analysis

The proposed work plan consists of five major tasks, which is further detailed by subtasks and deliverables. To successfully complete the project by December 2022, the timeline assumes that tasks will be conducted concurrently. The five major tasks are:

- Task 1 – Project administration
 - The lead consultant will manage the project and subconsultants and collaborate with staff to deliver the project on time and within budget.
- Task 2 – Community engagement strategy
 - Staff and the consultant team will develop a robust community engagement plan that includes strategies and techniques for broad participation, a list of expected meetings, events and activities, and their desired outcomes. The community engagement strategy needs to be innovative and inclusive, making sure that information is accessible and input can be provided in multiple ways.
- Task 3 – Housing element and related work
 - The City is working in collaboration with other jurisdictions in San Mateo County as part of 21 elements on the preparation of the housing element. The M-Group will coordinate with staff and 21

elements to prepare, at a minimum, the required components for a certified housing element. These tasks include, but are not limited to, a review and evaluation of current housing element, a housing needs assessment, an assessment of fair housing, analysis of non-governmental and governmental constraints, site inventory and analysis, and rezoning of sites to accommodate the City's housing allocation.

- Task 4 – Environmental justice and safety elements

- The preparation of the environmental justice element is a new chapter of the general plan and will address past practices that have disproportionately affected low-income residents, communities of color and immigrant communities, and focus on strategies and policies to help ensure the future health and well-being of the entire community. The environmental justice element is anticipated to encompass topics related to pollution, food access, access to public parks and other community facilities, public transit, climate change, education, housing and civic engagement.

The safety element, which was updated in 2013, will be updated to bring it into compliance with recent changes in general plan law, including SB 379 (climate adaptation and resiliency.) As part of the update, M-Group will prepare a vulnerability assessment describing the potential impacts of climate change on vulnerable physical assets and population. The study will be used to help develop goals, objectives and actions to include in the safety element update.

- Task 5 – Environmental and Fiscal Reviews

- The consultant team will prepare the necessary studies and documents for the preparation of an environmental impact report (EIR) that evaluates all components of the project. The consultant team will also prepare a fiscal impact analysis (FIA) to help inform the decision-makers and the community about the fiscal impacts of the proposed changes. The FIA would identify the impacts to expenditures and revenues to the City's general fund as well as special districts such as the Menlo Park Fire Protection District, the school districts and other special districts that serve the affected areas.

Public engagement strategy

The interview panel and the smaller group both emphasized the importance of community engagement at all stages of the project, particularly with groups that have not traditionally been represented in the outreach process, including non-English monolingual speakers, people of color, renters, students, families with young children, and seniors. Equally important to making contact with these stakeholders is making a connection and building trust between the community members, the City and consultants. This was a consistent message shared by the interview panels, and the group recommended staff to work with the M-Group to identify a community engagement partner to supplement their work. As part of the refining the scope, staff will collaborate with the M-Group to develop a community engagement strategy and identify partners to create a robust effort.

Housing Element Advisory Committee (HEAC)

The small group also recommended the creation of an advisory committee that includes community members to help ensure voices are heard. As part of the scope and budget refining process, staff will work with the M-Group to develop the framework for an advisory committee, identify the composition of the group and its objectives, and discuss the frequency of the meetings. The M-Group's draft proposal included monthly advisory committee meetings as an optional task for approximately \$20,000. Staff will work with the M-Group to incorporate this task into the work plan within the not-to-exceed budget amount, possibly by reducing the requested administrative fee and/or modifying other aspects of the proposed work plan.

Given the time-intensive nature of this work, a full 20 months will be needed to complete the project, excluding implementation items, such as modifications to the accessory dwelling unit ordinance or the

establishment of object design standards or other zoning amendments. These items can be considered once the specific housing goals and programs are identified and depending on the availability of staffing, budgeted resources and community capacity for public engagement. Staff recommends the City Council authorize the City Manager to negotiate a scope and fee, inclusive of the items recommended by the interview panels, and execute an agreement with a not-to-exceed budget of \$982,000.

Timeline and next steps

Once the scope of work has been finalized, staff plans return to the City Council (tentatively April 27) to provide an overview of the project, seek input on the givens or principles of the housing element and process to establish a common understanding of the goals and outcomes, and request authorization of the creation of the advisory committee. The anticipated project milestones and schedule is shown in Table 2.

Milestone	Date
Contract award	March 23, 2021
Kickoff meeting	April 2021
Background and data collection	Spring 2021
Develop land use strategies and site identification	Spring-Summer 2021
Develop environmental justice goals and policies	Spring-Summer 2021
Develop safety element	Spring-Summer 2021
Determine preferred land use strategies and sites	Fall 2021
Commence preparation of EIR	Fall 2021
Release draft EIR	Spring 2022
Draft documents	Spring 2022
Final EIR and documents	Fall 2022
Adoption	Fall 2022
HCD certification	January 2023

Impact on City Resources

On November 10, 2020, the City Council authorized up to \$1.69 million, inclusive of a \$150,000 Local Early Action Planning (LEAP) grant, for the preparation of the housing element, including consultant services and partial funding for two FTE for the FY 2020-21. The proposed request, in combination with the previously approved 21 elements scope of work of \$54,500, would not exceed the budgeted amount, unless approved by the City Council.

Environmental Review

This action is not a project within the meaning of the California Environmental Quality Act (CEQA) Guidelines §§ 15378 and 15061(b)(3) as it will not result in any direct or indirect physical change in the environment. As part of the housing element update process, an environmental impact report (EIR) will be

prepared.

Public Notice

Public notification was achieved by posting the agenda, with the agenda items being listed, at least 72 hours prior to the meeting.

Attachments

- A. Request for proposals – housing element update
- B. M-Group – draft housing element update proposal

Report prepared by:
Deanna Chow, Assistant Community Development Director

Report reviewed by:
Justin Murphy, Deputy City Manager

REQUEST FOR PROPOSALS – HOUSING ELEMENT UPDATE

Community Development Department
Deanna Chow
701 Laurel St.
Menlo Park, CA 94025
dmchow@menlopark.org
650-330-6733



Purpose

The City of Menlo Park is seeking proposals from qualified firms to prepare a scope of work, outlining the key steps, timeline, deliverables and budget by subconsultant, to complete the City’s Housing Element and related work. The work is expected to be complex and include the preparation of an Environmental Justice Element, updates to the Safety and Land Use Elements for compliance with State law and internal consistency, and rezonings and other Zoning Ordinance updates as needed. The proposal should also include the preparation of an Environmental Impact Report (EIR) pursuant to the California Environmental Quality Act (CEQA). The documents are expected to be completed by the end of 2022.

There is no expressed or implied obligation for the City of Menlo Park to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

The City of Menlo Park reserves the right to reject any or all proposals submitted. The City of Menlo Park also reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City of Menlo Park and the firm selected.

City staff will evaluate proposals submitted. During the evaluation process, the City of Menlo Park reserves the right, where it may serve the City’s best interest, to request additional information or clarification from submitting firms, or to allow corrections of errors or omissions. At the City’s discretion, the firms submitting proposals may be requested to make oral presentations as a part of the evaluation process.

RFP schedule

RFP issued	February 9, 2021
Proposals due	February 26, 2021
Interview finalist	March 5, 2021 (targeted)
Selection of firm	Week of March 8, 2021
Contract date	March 23, 2021 (targeted)

Background

The Housing Element is one of the City Council’s top priorities, and will be updated to include policies, strategies and programs that the City will implement to facilitate the production and preservation of housing to meet the needs across all economic segments of the City. Like many cities along the Peninsula, the City does not contain a surplus of vacant land and creative solutions will be needed to meet the City’s RHNA obligation. The project is anticipated to consist of multiple components, including the following:

- Engage in a robust community outreach process to ensure that the project reflects the community’s goals and values;
- Update the Housing Element, including addressing requirements for affirmatively furthering fair housing (AFFH) and other State mandates;
- Amend the Land Use Element, the Zoning Ordinance and/or rezone property to demonstrate compliance with the City’s RHNA;
- Develop an Environmental Justice Element (SB 1000) to advance equity and address potential environmental health risks in the City;
- Update the Safety Element (SB 379 pertaining to climate adaptation) for compliance with State law; and
- Prepare a Fiscal Impact Analysis and Environmental Impact Report to inform the public and decision-makers of potential financial and environmental impacts of the project.

The Housing Element Update process must be inclusive, and develop policies and programs that are equitable, measurable and achievable.

Scope of services

The project is expected to kick-off immediately following the City Council's approval of a consultant and contract, which is anticipated for March 23, 2021. The timeline for completion is the fall of 2022. Below are the key milestones for the project and a summary of tasks. The timeline assumes that tasks will be conducted concurrently to complete the project components on time. The proposal should include the following tasks at a *minimum* and consultants are encouraged to add to these tasks as deemed necessary.

Tasks summary

Task 1. Project administration

1.1 Kickoff Meeting

Consultant will schedule a kick-off meeting with City staff to discuss project expectations regarding coordination, reporting, deliverables, community engagement and relevant information. This meeting should include all subconsultants.

Deliverable: Meeting summary

1.2 Project schedule

Consultant will work with City staff to finalize a project schedule after the kick-off meeting that includes tasks and milestones for certification of the Housing Element to the State HCD by December 15, 2022, and related project components.

Deliverable: Overall project schedule and monthly updates showing progress. In the event the of project delays, consultant shall advise the City's project manager on the strategies to correct and mitigate.

1.3 Project coordination

Consultant will meet with City staff regularly to ensure project objectives and milestones are achieved.

Deliverable: Meeting summaries with follow-up items.

1.4 Advisory group (optional)

As part of your team's proposal, please include factors to be considered for the creation of an advisory group, the purpose of the advisory group, composition of the group, and the frequency of meetings. The proposal should provide a recommendation on whether an advisory group should be assembled to help the Housing Element process.

Task 2. Community engagement strategy

Community engagement will be an important part of the Housing Element Update. The community engagement strategy needs to be innovative and inclusive, making sure that information is accessible (e.g., online, mailings, in-person events, phone calls, interpretation and translation, etc.) and input can be provided in multiple ways. Strong emphasis should be placed on contacting groups that have not traditionally been represented in the outreach process, including monolingual speakers, people of color, renters, students, families with young children, and seniors. In the proposal, please describe your approach and tools for engaging with these stakeholders.

As part of the proposal, please also complete and submit the *Step 1 – Initial Assessment template* form and *Step 2 – Public Engagement Approach template* form, included as Attachment A. The purpose of the first template is to consider the various components, resources and constraints that come into play when planning a public engagement process while step 2 will help inform the approach to public engagement.

Deliverable: Public engagement strategy/plan with overall strategies and techniques to ensure broad participation, a list of expected meetings, events, activities, etc., and outcomes for each meeting, event or activity.

For purposes of budgeting, the following meetings should be assumed. Consultant shall work with staff to prepare meeting agendas, materials, presentations, meeting summaries and attend meetings. These meetings are subject to change based on recommendations in the Community Engagement Strategy.

<u>Task</u>	<u>Meeting type</u>
Housing Element introduction/education session	Community meeting(s)
Preliminary land use strategies and site identification	Community meeting(s), Housing Commission meeting, Planning Commission meeting and City Council meeting

Preliminary environmental justice and safety element goals and policies	Community meeting(s) and Planning Commission meeting
Preferred land use strategy	Community meeting(s) and Planning Commission meeting
Environmental review	2 Planning Commission meetings (NOP/Scoping and Draft EIR)
Draft documents	Community meeting(s), Housing Commission meeting and Planning Commission meeting
Adoption	Housing Commission, Planning Commission and 2 City Council meetings

Task 3. Housing Element and related work

The City is working in collaboration with 21 Elements on the preparation of the Housing Element. The selected consultant will coordinate closely with staff and 21 Elements on the following components. For reference, Attachment B includes work to be coordinated as part of 21 Elements (see Full Package). Due to the iterative nature of the process, the consultant should expect that changes will be made following outreach and input from members of the public, Commissions and City Council. Work shall be performed pursuant to the requirements of State law and result in a certified Housing Element.

3.1 Baseline review and background information

The Consultant will complete an analysis of previous RHNA construction, existing goals and policies, housing needs and projected needs, and an opportunities and constraints analysis. This will also include preliminary analysis on General Plan policies to combat housing discrimination in compliance with the recently adopted AFFH state law.

3.2 Adequate sites analysis

Prepare an "adequate sites analysis" showing the relationship between the City's RHNA allocation, the City's dwelling unit capacity, and availability of potential housing sites based on zoning, infrastructure and General Plan policies. The analysis should be integrated into the City's GIS system, and include maps and other graphic illustrations, along with a corresponding table that includes the Address, APN, parcel size, zoning and development capacity.

3.3 Land use strategies

The consultant shall evaluate the initial land use strategies developed in conjunction with 21 Elements and develop a minimum of three different land use strategies to meet the RHNA. Each strategy will list the total units achieved, the zoning and General Plan land use changes required, and potential pros and cons of the strategy. This work may be informed by a financial feasibility analysis to demonstrate how specific changes could make the development of housing more (or less) feasible. Based on feedback, a preferred strategy or strategies will be selected, which will inform the preparation of the EIR.

3.3 Develop Housing Element goals, policies and programs, and quantified objectives that reflect community values and needs.

3.4 Draft rezoning and other zoning ordinance and General Plan modifications

Consultant shall prepare the necessary documents for rezoning and any Zoning Ordinance and General Plan Amendments needed to meet the RHNA and implement the identified land use strategies.

3.5 Draft documents

Consultant shall prepare draft Housing Element and related changes for HCD's initial review and comment. Consultant, in conjunction with 21 Elements, will facilitate ongoing consultations with HCD on the preliminary analysis, questions and review for compliance.

3.6 City Council adoption

Consultant shall prepare public hearing draft for Planning Commission and Housing Commission recommendations and City Council adoption.

3.7 Certification

The consultant will facilitate state review and certification of the Housing Element upon adoption of the final draft by the City Council. The consultant will prepare a final version of the documents.

Task 4. Environmental Justice and Safety Elements

4.1 Staff has heard public sentiment reinforced by City Council comments that the Housing Element process should be viewed as more than just a State requirement that needs to be done in a timely manner. As part of the Housing Element, the City would like to prepare an Environmental Justice Element. This is an opportunity to reflect on past practices and create an equitable and sustainable future. Please include in your proposal how your team would approach the preparation of the Environmental Justice Element, including collecting background data and identifying tools for promoting civic engagement in the public-decision-making process.

Deliverables: Memo on the Environmental Justice requirements, preparation of a draft and final Environmental Justice Element that complies with the goals, policies and objectives of State Law, and review of the City's existing General Plan elements for internal consistency.

4.2 Safety Element Update

Review of the City's Safety Element for consistency with current State law.

Deliverables: Memo on the Safety Element requirements needed to comply with State law, preparation of draft and final Safety Element amendments, and review of City's existing General Plan elements for internal consistency.

Task 5. Environmental and fiscal reviews

The consultant shall prepare all necessary studies and documents for the preparation of an EIR that evaluates all components of the project. The consultant shall also prepare a fiscal impact analysis (FIA) to help inform the decision-makers and the community about the fiscal impacts of the proposed changes. The FIA would identify the impacts to expenditures and revenues to the City's General Fund as well as special districts such as the Menlo Park Fire Protection District, the school districts and other special districts that serve the affected areas.

Deliverable: An FIA and EIR that complies with all CEQA requirements. The consultant shall attend an NOP scoping session as well as public hearings during the comment review period and the certification of the EIR.

Project schedule

The following is a list of tentative project milestones that the consultant is expected to meet:

<u>Milestone</u>	<u>Date</u>
Contract award	March 23, 2021
Kickoff meeting	April 2021
Background and data collection	Spring 2021
Develop land use strategies and site identification	Spring-Summer 2021
Develop environmental justice goals and policies	Spring-Summer 2021
Develop safety element	Spring-Summer 2021
Determine preferred land use strategies and sites	Fall 2021
Commence preparation of EIR	Fall 2021
Release Draft EIR	Spring 2022
Draft documents	Spring 2022
Final EIR and documents	Fall 2022
Adoption	Fall 2022

Proposal requirements

This RFP states the scope of the City of Menlo Park's requirements and specifies the general rules for preparing the written proposal. The City will objectively evaluate all proposals based on the firm's response to the RFP.

Submit one electronic copy of the proposal and a file sharing link of the documents no later than 5 p.m., Friday, February 26, 2021, to Deanna Chow at dmchow@menlopark.org. No late submittals will be accepted. Due to the City's

network security, some attachments may be caught in the filter; therefore, a file sharing link is also requested. Upon receipt of a submittal, City staff will send an email confirmation. If no confirmation is received within 48 hours of submittal, please contact Deanna Chow directly.

The proposals should include a minimum of the following:

1. Firm introduction
Please include any additional information about your organization, experience, strengths, and interests in this project that may not have been previously provided in your statement of qualifications.
2. Project team and key staff
Identify the proposed project manager and the key staff from each subconsultant firm that would be available for the project. Please summarize the role of that individual in the proposal, the person's relevant experience, and include their resumes.
3. Budget and schedule
Provide a fee and budget estimate, by task, including all staffing costs, as well as expenses and assumptions. The proposal should suggest a delineation of tasks for which the consultant is responsible and those for which City staff will have the primary responsibility. Please include hourly billing rates for each proposed team member. The budget should assume sufficient time to coordinate closely with staff and at a minimum, draft and final versions for all documents. Please include a schedule with the proposal that identifies the overall timeline for the project, including key milestones and deliverables, as well as public engagement efforts.

Selection process

An interview panel will evaluate proposals and submit their recommendation to the City Council for final approval. Panelists will individually evaluate the proposals as well as the information provided during the interview. The interview panel will make a recommendation to the City Council.

Oral interviews

Interviews via Zoom or similar online platform are expected to occur Friday, March 5, 2021. Firms would be expected to make a brief introduction and presentation about their team and proposal. The lead presenter should correspond to the person who will be the primary person presenting at community, City Council and Commission meetings. The interviews will provide firms the opportunity to clarify their proposals to ensure thorough and mutual understanding. Additionally, the selected firm may be required to attend a City Council meeting. All expenses incurred by proposers for participating in such interviews and City Council meetings will be the responsibility of the proposer.

Evaluation criteria

Proposals will be evaluated using the following set of criteria. The following represent the principal selection criteria, which will be considered during the evaluation process.

1. Expertise and performance on past comparable projects
2. Quality of firm's professional personnel assigned to the project and demonstrated experience in effective project management
3. Proposed approach for accomplishing milestones for the various components of the project
4. Proposed approach for ensuring equitable and sustainable outcomes
5. Demonstrated experience and knowledge of innovative public engagement and outreach strategies
6. Review of references

Obligations

The successful proposer will be required to enter into a written agreement with City in which the proposer will undertake certain obligations. These obligations include but are not limited to the following:

- Inclusion of proposal
The proposal submitted in response to this RFP will be incorporated as part of the final contract with the selected firm.
- Indemnification and insurance
The successful proposer shall indemnify and hold the City and its officers, agents, employees, and assigns harmless from any liability imposed for injury whether arising before or after completion of work hereunder or in any manner directly or indirectly caused, occasioned or contributed to or claims to be caused, occasioned or contributed to, in whole or in part, by reason of any act or omission, including strict liability or negligence of vendor, or of anyone acting under vendor's direction or control or on its behalf, in connection with or incident to, or arising out of the performance of the contract. The successful proposer shall maintain and shall require of all its subcontractors to maintain Comprehensive General Liability Insurance with limits of not less than one million dollars (\$1,000,000) per accident, and \$15,000,000 in aggregate through an insurance carrier rated B+ or higher by A.M. Best or an equivalent level through a similar rating agency.

- **Withdrawal**
A proposal may be withdrawn, without obligation, by an authorized representative of the proposer in writing at any time before the scheduled Closing Date.
- **Rights to materials**
All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposer that are submitted as part of the proposal and not withdrawn before the scheduled Closing Date shall, upon receipt by the City, become property of the City. The City reserves the right to retain all proposals submitted and use any idea in any proposal regardless of whether that proposal is ultimately selected for award.
- **Rejection of proposals**
The City reserves the right to reject any or all proposals or any part of each proposal; to waive any irregularity in any proposal and to determine which, in its sole judgment, best meets the City's needs to receive an award after successful contract negotiations. No vendor may withdraw its proposal for a period of ninety (90) days after the opening thereof. For any products or services not included in the initial contract award, vendor agrees to hold prices as proposed for one year following the initial award unless mutually agreed otherwise in the negotiated final contract.
- **Disclosure of proposal information**
After award, all written proposals are open to public inspection. The City assumes no responsibility for the confidentiality of information offered in a proposal. All proposals are public records subject to public disclosure pursuant to the provisions of the California Public Records Act (Government Code §6250 et seq.). The RFP is intended to be worded in a manner so as not to elicit proprietary information. If proprietary information is submitted as part of the proposal, such information must be labeled proprietary and be accompanied with a request that the information is to be returned by the City to the submitter. Any proposal submitted with a blanket statement or limitation that would prohibit or limit such public inspection shall be considered nonresponsive and shall be rejected.
- **Governing jurisdiction**
The contract entered into by the successful firm and the City shall be interpreted, construed and given effect in all respects according to the laws of the State of California.

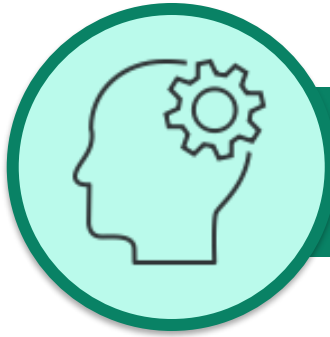
Award conditions

The successful proposer shall enter into a standard City agreement. Consultant shall obtain all licenses and permits as may be required by any other governing entity. Further, consultant shall comply with all pertinent local, State and Federal laws and regulations, including those that address discrimination.

Attachments

The following pages include:

- Attachment A – Step 1 – Initial Assessment template form and Step 2 – Public Engagement Approach template
- Attachment B – 21 Elements Scope of Work
- Attachment C – Proposer Guarantee
- Attachment D – Proposer Warranties



THINK

Initial Assessment

Purpose of this template: To contemplate the various components, resources and constraints that come into play when planning a public engagement process.

Directions: Fill in the document the best you can; you do not need to go in order.

Category	Fill in if applicable	Note
Title of effort		Internal title or formal title.
Time horizon		Weeks/ months.
Geographic focus		Whole jurisdiction or subsection; be specific.
Target outreach groups		E.g.: Homeowners, renters, youth, ethnic groups, business owners, parents of afterschool program recipients.
Level of public input desired	<i>Tip: Address this category when resource constraints are clear.</i>	Could depend on: the amount of time/ resources available; significance of issue; what just happened or is coming soon with other engagement. See also IAP2 Engagement Spectrum

Shaping the Future Together: A Guide to Practical Public Engagement for Local Governments

THINK

INITIATE

ENGAGE

REVIEW

SHIFT

Potential components of in person engagement		E.g.: Small meetings with stakeholders, focus groups, town hall, workshops, open house, listening sessions (similar to coffee with a cop).
Digital components	<i>Tip: At a minimum have info easily accessible on your website.</i>	E.g.: Website; surveys; instant polling; ideation; etc.
Outreach efforts	See Outreach Template	
Potential locations to hold events/ meetings		E.g.: Community Centers, schools, libraries, government buildings, faith-based, community rooms at institutions such as banks, foundations, non- profits, etc.
Lead staff		Name(s); roles
Supporting staff		E.g.: PIOs, Manager’s Office, CAO’s Office, Director’s Office, I.T., printing department; utilities (for mailers), etc.
Consultant(s) (If applicable)		Name(s)/ role(s)



Role(s) of Electeds		E.g.: Welcoming at meetings in their area, keeping those with keen interest in the loop regularly; involving elected/ their staff in planning of events.
Key stakeholders		<p>Quick list of a few key stakeholders; these folks should have various perspectives on the issue(s). Make phone calls to run these very first ideas by them. At least three phone calls (example script below)</p> <ul style="list-style-type: none"> • This is __. I’m exploring an issue and I was hoping to get some quick, initial feedback from you on it – if you have time. • It’s __Name issue __; we’ve got about __weeks/mo__ to connect with the community on their views so we are exploring how we might do that. • What are your initial, just gut level thoughts on what the (City/County/Special District) should do? • [If appropriate] Right now we are contemplating __activities... What do you think? • This is my final question, If I was going to call 3 more folks on this who do you think we should reach out to?
Budget	<p>\$:</p> <p>Staff time:</p>	If no dollar budget, note ‘in house’ or in-kind resources that are important. Staffing: Be sure to consider how much time it is likely to take to input public feedback, analyze and/or theme input, and, if applicable, prepare input summary for public view.



<p>Tricky potential issues</p>		<p>Consider <u>Internal challenges</u> (eg. Over these three months we are switching IT servers; over these months our Director is retiring).</p> <p>Consider <u>External challenges</u> (eg. very vocal group will be against; a business is being built in that area and residents are still upset about how that went; Measure __ failed two months ago and people might associate this with that; A recent police shooting has neighborhood on edge and especially distrustful of government).</p>
<p>Legal consideration</p>		<p>Policy or legal issues to consider- work with your legal counsel (city attorney, county council, etc.).</p>
<p>What happens with public input</p>		<p>If a resident asks “What happened to my input/ suggestion” what are you going to say.</p>

About the Institute for Local Government

The Institute for Local Government’s (ILG) mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities, the California State Association of Counties and the California Special Districts Association.

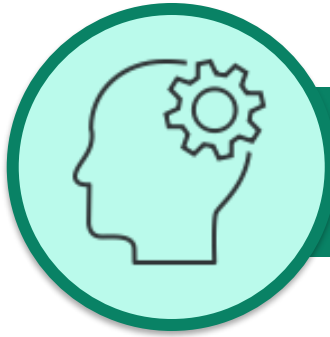
For more information about the TIERS Framework and Learning Lab, please contact publicengagement@ca-ilg.org

To access the Institute’s resources on public engagement, visit www.ca-ilg.org/engagement

© 2017 Institute for Local Government. All rights reserved.

Shaping the Future Together: A Guide to Practical Public Engagement for Local Governments





THINK

Public Engagement Approach

Purpose of this template: To help you think through an effective Public Engagement Approach.

Directions: Use this template to create your own Public Engagement Approach. Consider what actions should be in-person versus digital efforts.

PART A: Brainstorm Elements

In-person Efforts

Category	Examples	Brainstorm
'Smaller' Engagement Efforts	<ul style="list-style-type: none"> ○ 'Coffee' meetings w/ 1 or 2 stakeholders ○ Small group meetings (one stakeholder group for ex) ○ House parties ○ Focus groups (informal) 	
'Larger' Public Meetings	<ul style="list-style-type: none"> ○ Workshop ○ Townhall ○ Gallery Walk ○ Table Level Facilitated Groups (6-8 people per table) ○ Open Space ○ Conversation Cafe ○ Other dialogue techniques 	

Digital Efforts

Category	Examples	Brainstorm
Inform... Presenting information	<ul style="list-style-type: none"> ○ Website ○ Newsletter ○ Blogs ○ Infographics ○ Visual simulations 	
Consult... Ask community for input on a defined issues	<ul style="list-style-type: none"> ○ Survey ○ Poll ○ Budget Challenge 	
Involve... Community helps to define the issue w their input	<ul style="list-style-type: none"> ○ Ideation ○ Prioritization ○ Mapping ○ Online forum ○ Trade off exercises 	
Collaborate... Community helps decide and/or implement	<ul style="list-style-type: none"> ○ Interactive community planning platforms ○ Joint data generation apps ○ Collaborative writing/ hacking ○ Neighbor to neighbor apps 	

Questions to Consider

- Who will facilitate?
- Who will take notes?
- What are options for providing comment (hand written/ verbal/ post-it/ dots/ etc.)?
- Who will compile comments that are gathered?
- Who/ how will data be 'themed' and analyzed?
- What will be done with 'off-topic' comments or concerns?
- What is 'Plan B' if there are very disruptive folks/people with very strong emotions/concerns?
- How will in-person input be aggregated with input received online?
- How/when will public see what happened to their comments?

PART B: Draft Plan

Element	Staffing. # of Staffer(s)	Cost. Beyond staff time is there a cost for the element?	Time. How time intensive? 1-5 (1 less intensive, 5 very intensive)
<i>[Example] Survey (internal)</i>	<i>1 or 2 staffers (draft and review)</i>	<i>No. Our agency already has a subscription</i>	<i>1. Won't take too long to draft and send</i>
<i>[Example] 'Coffee meetings' w 10 key stakeholders</i>	<i>2 lead staffers. Some meetings together; some divided.</i>	<i>Very little. (coffee!) Travel.</i>	<i>1-3. depends on project</i>



About the Institute for Local Government

The Institute for Local Government's (ILG) mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities, the California State Association of Counties and the California Special Districts Association.

For more information about the TIERS Framework and Learning Lab, please contact publicengagement@ca-ilg.org

To access the Institute's resources on public engagement, visit www.ca-ilg.org/engagement

© 2018 Institute for Local Government. All rights reserved.



21 Elements

Scope of Services

21 Elements for RHNA 6

July 14, 2020

Overview

This document outlines the Scope of Services to be provided to the twenty-one jurisdictions of San Mateo County to support them in preparing their housing element updates for the 2023-2031 planning period. The materials describe the benefits of this collaborative approach in leveraging resources, achieving cost-efficiencies and sharing information.

The Scope of Services and the County’s approach to 21 Elements/RHNA 6 is designed to provide each jurisdiction with a range of choices to best fit their individual needs. Similar to 21 Elements for RHNA 5, the RHNA 6 effort is structured so that C/CAG (City/County Association of Governments of San Mateo County) and the San Mateo County Department of Housing will absorb a significant portion of the costs for the work effort (as described in the service package summaries).

This document includes:

- I. Project Purpose and Goals..... 2
- II. Budget Summary 3
- III. Service Package Summaries and Task Descriptions 4
- IV. Process Overview and Schedule 17



21 Elements

I. Project Purpose and Goals

The proposed services will help participating jurisdictions effectively and efficiently update their Housing Element to meet State law requirements within the State-mandated schedule. Consistent with this purpose, the project will advance more effective pro-housing policies and programs to facilitate the creation of new and diverse housing choices that meet the needs of a growing and changing population, and affirmatively advance fair housing in a manner that supports the health and well-being of all.

Housing Element requirements are prescribed in detail in State law (Govt. Code Sec. 65580 et. seq.). This Scope of Services is structured around those requirements to provide a combination of templates, methodologies, baseline data, comparative information, key findings, write-ups, best practices, and process materials. Overarching goals for the work include:

- **Goal 1 — Build-Upon Past Accomplishments.** As with previous RHNA cycles, provide baseline data on housing needs and barriers and “best practices” (model policies, programs, and implementing tools) tailored to San Mateo County. In addition, create easy-to-use materials for facilitating effective community dialogue on housing challenges and opportunities, and build upon recent collaboration efforts on ADUs, the affordable housing nexus study and related work.
- **Goal 2 — Achieve High Quality Housing Elements While Saving Money, Time and Resources.** The services are designed to save money by minimizing duplication of effort, including collaboration on early analysis of available sites and potential strategies for expanding site inventories as well as shared work around countywide analyses, data templates and model practices. These services make it easier to complete key tasks while improving the quality of outcomes.
- **Goal 3 — Continue the Constructive Working Relationship with HCD.** Feedback from previous update cycles underscored that collaboration with HCD was extremely helpful in achieving housing element certification. HCD also reports that early collaboration facilitated their review and made for higher quality housing elements in San Mateo County.
- **Goal 4 — Enable Jurisdictions to Meet the January 2023 Deadline.** Housing Elements are due January 2023. While there is a 120-day grace period, penalties for non-compliance can be significant. Recognizing that the increased RHNA targets combined with increased scrutiny related to the site inventory will make this update cycle particularly challenging, the proposed services focus on getting an early start to the sites analysis so that the update and implementation of needed rezoning and other regulatory changes can be completed in a timely manner.
- **Goal 5 — Tailor a Range of Choices to Best Fit Jurisdiction Needs.** As in the previous round of updates, each jurisdiction can choose the packages of service that best fit their needs while leveraging the benefits of ongoing collaboration.



21 Elements

II. Budget Summary

The budget for each service package, tiered by city size, is summarized below. Each service package is subsidized by a contribution from the City/County Association of Governments (C/CAG) and San Mateo County Department of Housing (DOH):

	<i>Small City</i>	<i>Mid-Size City</i>	<i>Large City</i>
Base Package	\$ 2,500	\$ 2,500	\$ 2,500
Getting Started Package	\$ 9,000	\$ 13,000	\$ 19,000
Foundations Package	\$ 7,000	\$ 9,000	\$ 10,000
Full Package	\$ 30,000	\$ 30,000	\$ 30,000
"All In"	\$ 48,500	\$ 54,500	\$ 61,500

The table below indicates which cities are in each tier:

Small Cities	Mid-Size Cities	Large Cities
Atherton	Belmont	Daly City
Brisbane	Burlingame	Redwood City
Colma	East Palo Alto	San Mateo City
Hillsborough	Foster City	South San Francisco
Portola Valley	Half Moon Bay	
Woodside	Menlo Park	
	Millbrae	
	Pacifica	
	San Bruno	
	San Carlos	
	San Mateo County	



21 Elements

III. Service Package Summaries and Task Descriptions

The four service packages are outlined in this section, with detail regarding specific work tasks and products. They are:

- The Base Package (page 5)
- The Getting Started Package (page 8)
- The Foundations Package (page 11)
- The Full Package (page 14)

Following one-page summary overviews for each service package that include a list of specific deliverables and summary-level description of key tasks, each of the tasks is described in greater detail. *A brief description of jurisdiction staff's responsibilities related to each task is provided in italics.*

An estimate of city staff time commitment for each service package is provided at the bottom of each one-page summary. For cities participating in all of the packages, you should anticipate staff commitment of approximately 0.5 FTE, on average, for the duration of effort (though clearly that will fluctuate monthly based on work flow as well as based on jurisdiction size and complexity of the issues being addressed).

Importantly, the service packages do not include work effort to undertake rezoning, ordinance development to enact needed changes to development standards, or other implementation actions that may be needed to achieve certification (including related environmental analyses and documentation that these implementing actions may entail).

Section IV of this document (page 17) illustrates the schedule and sequencing of tasks across all four service packages, including jurisdiction-led rezoning efforts that may be prioritized as a result of the Getting Started work and outcomes.



21 Elements

1. BASE Package - General Support for RHNA 6 and Housing Element Updates

Overview Support cross-jurisdictional learning, coordination, collaboration and problem-solving for the duration of the housing element process through regular meetings, countywide analyses, best practice research, and shared data and communications tools.

Timing *June 2020 through January 2023 (32 months)*

Cost *\$2,500 per jurisdiction (full cost \$11,000, with \$8,500 covered by C/CAG and DOH) (assumes full participation)*

- Core Tasks**
- a Facilitate sharing and collaboration, including special work sessions and regular meetings
 - b Focused research and dialogue on issues of special concern, including strategies to affirmatively further fair housing
 - c Provide educational materials and outreach support
 - d Engage with HCD on overall process, tours, and technical assistance
 - e Develop countywide analyses with jurisdiction-level data for housing needs, etc.
 - f Create templates and best practice tools, including support for property owner surveys
 - g Conduct ADU affordability survey
 - h Educate Sacramento lawmakers about jurisdiction experience

- Products**
- ✓ 21 Elements website updates, including tools, outreach materials, etc.
 - ✓ Regular meetings and discussion summaries
 - ✓ Countywide and jurisdiction-specific need tables
 - ✓ Countywide analyses, data templates, best practice reports and similar based on group needs
 - ✓ ADU affordability survey
 - ✓ Shared educational tools for the general public and decisionmakers

- City Roles**
- ▶ Fully participate in regular meetings and special work sessions.
 - ▶ Review and provide feedback on draft work products, including data tools, research papers, educational materials, etc.
 - ▶ Serve as a conduit to others in your city organization and community on issues of shared concern.
 - ▶ Actively share local challenges, best practices, relevant resources and housing knowledge.

City Time Average of 6 – 10 hours a month over the course of the RHNA 6 process.



21 Elements

BASE PACKAGE - Task Descriptions

- 1a Facilitate Sharing and Collaboration.** Schedule, facilitate and document regular cross-jurisdictional meetings to engage city staff and directors in discussions of issues, opportunities, approaches, strategies and ideas pertinent to the housing element updates. Meetings may include guest participants to discuss technical topics, “how to” sessions, and focused work sessions to collaboratively problem-solve. We anticipate one meeting per month, with others added as needed, supplemented by ongoing project coordination and communications.
- 1b Conduct Focused Research.** To support shared learning about best practices, and dialogue on issues of special concern, the 21 Elements team will conduct research on topics of special interest based on input and requests from member jurisdictions. Work products may take the form of white papers, fact sheets, powerpoint presentations and/or webinars depending on the type, extent and format of information. This work will include exploration of best practices and strategies to affirmatively further fair housing.
- 1c Create Shared Outreach Materials.** The 21 Elements team will develop materials to support education and outreach efforts by member jurisdictions and county partners. The purpose of these materials will be to support community understanding and dialog about housing needs, the role and purpose of the housing element, and strategies being used locally and elsewhere to create and sustain diverse housing choices, affordability and healthy communities. Production of materials will be coordinated with key steps in the update process, with most being produced in the first year when community discussions are getting underway. To the extent possible, materials will be designed so that they can be easily customized by each jurisdiction to tailor them to localized information and circumstances.
- 1d Engage with HCD.** The 21 Elements team will help ensure early and ongoing engagement with HCD staff in order to help them understand the unique challenges and opportunities of San Mateo County jurisdictions, and to help all member jurisdictions better understand HCD’s expectations, perspectives and priorities. By building and maintaining a collaborative and respectful working relationship, 21 Elements will help ensure that the update process goes as smoothly as possible—highlighting and addressing issues *before* updated elements get submitted to HCD—and bringing situational awareness and technical assistance to bear in a timely manner, facilitating more efficient reviews by HCD with fewer surprises, and helping ensure higher quality housing elements.
- 1e Conduct Countywide Analyses of Housing Needs and Market Conditions.** Develop countywide analyses of housing needs, including population, employment and household characteristics; general housing stock characteristics; the incidence of overpayment and overcrowding; and special housing needs (e.g., people experiencing homelessness, people with disabilities, seniors, etc.). Data



21 Elements

will be reported at the County level and in comparative tables and graphics detailing each jurisdiction's data as well. Analysis will also be provided related to the countywide and regional housing market conditions and trends.

- 1f Create Templates and Other Tools.** Data templates, methodologies and related tools will be developed to support each jurisdiction's work. These include but are not limited to: template and instructions for evaluating existing elements; tools for assessing and comparing governmental and non-governmental constraints; and tools for evaluating and improving fair housing practices. This work will also support development of a property owner survey for substantiating properties included in site inventories.

- 1g Conduct ADU Affordability Survey.** The 21 Elements team will develop and implement a survey of ADU property owners (using lists provided by participating jurisdictions) to better understand how they are being used, who is being served by them, and the levels of affordability being met. This will help inform how jurisdictions incorporate ADUs within their overall housing strategy, including how to apply them to RHNA targets, and support development of more effective ADU policies and programs in the housing element update.

- 1h Educate Lawmakers.** Much of the housing element process is driven by State legislation. To help support a more responsive and effective legislative framework for future updates, it is important to communicate back to lawmakers about the experience of local jurisdictions working to translate State law into local action. Working as a group, 21 Elements is able to speak effectively to multiple experiences from the perspective of jurisdictions with proven commitment to pro-housing policies to help lawmakers understand what's working, what isn't and how things could be improved.

Jurisdiction staff will be expected to participate fully in all Task 1 activities, including in particular the regular sharing and collaboration meetings, review and feedback of draft work products, and discussions with HCD and lawmakers, as needed. Experience has shown that the more staff engage in and contribute to the collaboration and its activities, the more they get out of it.



21 Elements

2. GETTING STARTED Package – Site Inventories and Strategies

Overview Assess potential sites and strategies for creating additional housing capacity, taking into account anticipated need allocations and recent changes in state laws that affect site eligibility. The outcome will be early identification of the most viable strategies to ensure adequate sites so that rezoning and other actions can be completed in conjunction with the update process.

Timing *June 2020 through June 2021 (13 months)*

Cost *Small cities \$9,000; Mid-size cities \$13,000; Large cities \$19,000 (additional \$4,000 per city covered by C/CAG & DOH; assumes full participation)*

- Core Tasks**
- a Prepare jurisdiction-specific inventory baselines (based on current inventory of zoned and planned sites) and compare to anticipated RHNA need numbers. How much additional capacity will need to be found?
 - b Conduct development feasibility analyses based on defined site inventory gaps to identify market-supportive capacity increases that could be achieved through alternative planning and policy strategies (including rezoning and other regulatory changes).
 - c Estimate high-level tax revenue implications of the alternatives.
 - d Study market absorption rates for missing middle housing.
 - e Review analysis methodology and results with HCD.
 - f Identify the most promising site capacity strategies for each jurisdiction to meet RHNA needs and help ensure that rezoning and other actions can be completed in conjunction with the update process.

- Products**
- ✓ Site inventory baselines and anticipated gaps by jurisdiction
 - ✓ Data on potential market-supportive site capacity increases (mapped and quantified) through alternative policy strategies (e.g., rezoning based on defined criteria; changes to development standards; etc.) with summary of tax impacts.
 - ✓ Report on market data for “missing middle” housing and implications for RHNA 6.
 - ✓ Recommendations on policy and program strategies for each jurisdiction (developed in conjunction with jurisdiction staff) to meet RHNA

- City Roles**
- ▶ Provide data on current sites using template and engage in discussions.
 - ▶ Participate in working group to inform and guide the analysis and “missing middle” study, providing feedback on methodology, strategy alternatives and draft findings.
 - ▶ Work with 21E team to define recommendations on strategy priorities.

City Time 16 to 32 hours a month over the course of 13 months



21 Elements

GETTING STARTED PACKAGE - Task Descriptions

2a Document and Confirm Existing Inventory; Quantify the Gap. The 21 Elements team will work with jurisdiction staff to document, update, review and confirm jurisdiction-specific baselines of eligible sites based on current inventory of zoned and planned sites, updated to reflect State requirements related to site eligibility and entering into the State’s new inventory tool. The team will then compare the baseline inventory to the anticipated RHNA need numbers by income category, and quantify the additional capacity that will need to be created in each income category to meet the anticipated need targets. *Jurisdiction staff will need to be highly engaged in this task to provide and carefully review baseline data and site-specific information.*

2b Conduct Feasibility Analysis of Potential Site Strategies. 21 Elements will engage an economic analysis firm to conduct development feasibility analyses of market-supportive strategies that could respond to the defined site inventory gaps. Examples of alternative planning and policy strategies including rezoning of sites and sub-areas based on defined criteria (e.g., in proximity to transit or retail centers, etc.); changes to development standards that could increase site capacity (e.g., units per acre, height, etc.); and changes to existing zoning districts (e.g., changes to expand potential for multiplexes in lower density zones or to allow housing in commercial zones, etc.). A working group of jurisdiction staff will be formed to help guide the analysis work. *Jurisdiction staff will need to participate fully in the working group, methodology review, choice of policy options for analysis, and review and refinement of results.*

The analysis process will include:

- Compiling parcel-level base data from the site inventories and exiting County GIS into a MapCraft database.
- Engaging the work group to define policy options for initial countywide analysis, with subsequent refinement to determine both the increase in site capacity and realistic market response that could be expected from implementation of each option, with results mapped and quantified both countywide and by jurisdiction. This will be a first-tier analysis to inform policy deliberations and identification of the most promising strategies for each jurisdiction which will then require more detailed review and refinement in subsequent steps of the update process in each jurisdiction.
- Draft results will be reviewed with the working group and with staff from each jurisdiction, with subsequent refinement based on feedback. While several iterations of analysis will be possible, the number of iterations will be limited by the time budget for this sub-task.
- The analysis will illustrate the increased gross site capacity that would result from each policy strategy and realistic market response in delivering housing outcomes in each RHNA income category.



21 Elements

2c Summarize Fiscal Impacts. To further inform the consideration of policy alternatives that could expand site capacity in response to RHNA requirements, the results from Task 2b will be supplemented by a high-level evaluation and quantification of potential tax revenue impacts. *Jurisdiction staff involved in the working group will participate in reviewing and providing feedback on the fiscal analysis methodology and results.*

2d Analyze “Missing Middle” Housing Performance. Related to the analysis of potential policy alternatives that could expand site capacity, the 21 Elements team will study the market performance and absorption rates for “missing middle” housing types (e.g., duplexes, triplexes, townhomes, small multiplexes) in San Mateo County. The purpose of this analysis will be to understand cost and price ranges of these housing products (both historic and recently built), where they are located, marketability and who they are serving. This data will be helpful to jurisdictions as they explore policy and program strategies to expand these housing types during the update process. *Jurisdiction staff involved in the working group will participate in reviewing and providing feedback on the “missing middle” study’s methodology and results.*

2e Facilitate HCD Review and Feedback. To ensure that the analysis process and results meet State expectations for the site inventories and substantiation of market readiness, the 21 Elements team will confer regularly with key HCD staff during the Getting Started process, including to review the approach and methodology; provide input on the policy options being explored; and provide review and feedback on the draft and final results.

2f Provide Jurisdiction-specific Recommendations. The 21 Elements team and economic consultant will summarize the “Getting Started” analysis results and make recommendations to each jurisdiction—in close consultation with staff—regarding the most promising and relevant site strategies to pursue in the update, including recommendations for further analysis or refinement and next steps to complete the site inventory section of the housing element as well as recommended rezoning and other regulatory change actions to implement the priority strategies. *Jurisdiction staff will need to participate fully in the development and vetting of recommendations, including engagement of other city staff and leaders, as needed, to confirm general support for the direction(s) being recommended.*



21 Elements

3. FOUNDATIONS Package – Housing Needs and Constraints; Focused Support

Overview Begin updating the housing element: evaluate the existing element in relation to recent state law requirements; develop the key foundational sections of the housing element; and refine the update’s work program and schedule, including engagement strategy, rezoning and other actions, as needed, to achieve a certified element.

Timing *June 2020 through June 2021 (13 months)*

Cost *Small cities \$7,000; Mid-size cities \$9,000; Large cities \$10,000 (additional \$4,000 per city covered by C/CAG & DOH)*

- Core Tasks**
- a Work with jurisdiction staff to evaluate existing element and define update needs.
 - b Prepare jurisdiction-specific Housing Needs Analysis and Background text, drawing on countywide and local data.
 - c Prepare jurisdiction-specific Governmental and Non-Governmental Constraints Analysis sections in collaboration with jurisdiction staff.
 - d Develop jurisdiction-specific scope and schedule for completing the housing element update, including needed regulatory changes.
 - e Facilitate informal consultation with HCD on jurisdiction-specific issues.
 - f Provide tailored outreach materials regarding housing needs and opportunities.

- Products**
- ✓ Evaluation of existing housing element
 - ✓ Drafts of key sections: background, housing needs, governmental constraints and non-governmental constraints
 - ✓ Refined work plan and schedule for remainder of the housing element update
 - ✓ Tailored educational and outreach materials

- City Roles**
- ▶ Provide data relevant to the existing housing element, local housing conditions, and both governmental and non-governmental constraints using provided templates. Write some jurisdiction-specific context.
 - ▶ Edit material provided by 21 Elements.
 - ▶ Collaborate on developing and refining the work program and schedule to complete the update.
 - ▶ Participate in jurisdiction-specific consultations with HCD.
 - ▶ Review and provide feedback on draft work products.
 - ▶ Engage other jurisdictional staff and departments as needed to provide relevant data and reviews.
 - ▶ Schedule and lead local engagement activities with 21E support.

City Time 30 - 50 hours a month over the course of 13 months



21 Elements

FOUNDATIONS PACKAGE - Task Descriptions

3a Evaluate Existing Elements; Define Update Needs. The 21 Elements team will provide a HCD-reviewed template, methodology and outline for jurisdictions to use in assessing their current housing element per State law requirements. The review will document the effectiveness of the element, including actual results or outcomes (quantified where possible, and qualitative where necessary), progress in implementation and any significant differences between what was projected or planned and what was actually received, and key lessons learned that can be applied during the update process to strengthen the element’s effectiveness. The review will also highlight where updates are needed to bring each jurisdiction’s element into compliance with recent State law changes. *Jurisdictions will be asked to provide an annotated copy of their current housing element along with responses to a tag-along comment sheet, and to provide copies of Annual Progress Reports and other documents relevant to the evaluation. Jurisdiction staff will also provide brief evaluation write-ups using the provided the template and methodology covering policies, programs, quantified objectives (where applicable), barriers to implementation and recommendations for the housing element update (carry forward as is, carry forward with specific modifications, or delete).* The 21 Elements team will provide the needed templates, technical assistance, and review/summary of results, and will compile an overview of jurisdiction “best practices” based on the compilation of evaluation results from across the participating jurisdictions.

3b Analyze and Summarize Housing Needs, including Special Housing Needs and Projected Needs. Building on the results of the Countywide Housing Needs Analysis, the 21 Elements team will summarize jurisdiction-specific data needed for the housing element update, including population, employment and housing characteristics; overpayment and overcrowding; extremely-low income housing needs; housing stock characteristics; assisted housing “at risk” of conversion; opportunities for energy conservation; persons with disabilities; elderly; large families and female-headed households; farmworkers; and families and persons in need of emergency shelter. An overview of the RHNA 6 housing need projections will also be provided, including explanatory narrative, along with template and methodology for counting units built, under construction and/or approved during the planning period. Summary tables and narratives will be provided for all of the listed topics, which can then be tailored to each jurisdiction’s needs, working in partnership with jurisdiction staff. Key findings will also be summarized and with potential policy and program strategies identified. *Jurisdiction staff will be responsible for providing materials on housing construction and any locally generated data of significance as well as information on locally assisted housing, energy conservation and rehab programs, green building, and related programs covering housing needs. They will also need to provide their own housing conditions analysis, including quantification of substandard units, using sample survey instruments, templates and methodology provided by the 21 Elements team.*

3c Analyze and Summarize Governmental and Non-Governmental Constraints. The 21 Elements team will provide HCD-reviewed templates, methodologies and outlines to assess jurisdiction-specific governmental constraints on housing production and related impacts on housing costs. This analysis is intended to provide a periodic reexamination of local ordinances, policies, standards and practices that may, under current conditions, constitute a barrier to the maintenance, improvement or



21 Elements

development of housing for all income levels. In particular, governmental constraints that may exclude housing affordable to low- and moderate-income households may constitute a violation of State and federal fair housing laws, and will need to be addressed through the update, to be replaced with policies, standards and practices that affirmatively further fair housing. Worksheets and questionnaires will be provided to facilitate jurisdiction review and input, covering issues relevant to the site inventory, including but not limited to development standards and land use controls, special housing types (second units, manufactured homes, etc.), local processing and permitting procedures, affordable housing incentives, design review and historic preservation, codes and enforcement, and more. An analysis of non-governmental constraints on housing production will also be completed, including the cost of land, construction costs, availability of financing, and issues such as short-term rentals. *Jurisdiction staff will be responsible for compiling information on the covered governmental constraints topics using the templates, worksheets and methodology provided; and for reviewing and providing feedback on comparative tables to ensure accuracy in summarizing jurisdiction-specific standards. Staff will also work closely with the 21 Elements team to develop jurisdiction-specific conclusions regarding the constraints analysis and priority policies or programs for inclusion in the updated housing element to address key issues and ensure a pro-housing regulatory environment.*

3d Refine Housing Element Work Plan and Schedule (as needed). The 21 Elements team will partner with jurisdiction staff to review key issues from the sites analysis, housing needs analysis and constraints analysis to define the work effort needed to address the identified issues and achieve a certified element, including confirmation of any rezoning, changes to development standards or other implementing actions that may need to be undertaken in conjunction with the update. A process graphic and schedule will be produced to illustrate the needed steps and coordination across tasks, including community engagement, to meet the overall element schedule and State deadline. *Jurisdiction staff will need to participate in the review and confirmation of update needs and work program refinement.*

3e Facilitate HCD Consultations. Building off the previous work with HCD, the 21 Elements team will engage HCD staff during this phase of work, as initial analyses are being completed and sections of the updated elements are being developed. The approach is intended to help ensure “no surprises,” making sure that HCD staff are familiar with and supportive of the analyses and draft work products, addressing issues as they arise to ensure that they will meet expectations when submitted for eventual certification. *Jurisdiction staff will be expected to participate in direct conversations with HCD staff, facilitated by the 21 Elements team, on an as-needed basis.*

3f Provide Tailored Outreach Materials. Building off the work shared outreach material referenced above (1c), the 21 Elements team will develop tailored jurisdiction-specific outreach and education materials to present summaries of each city’s housing needs and opportunities, commitment to a pro-housing agenda, and specific action alternatives and priorities for the update. Materials will include both web- and print-format fact sheets and FAQs as well as a tailored powerpoint presentation for use by staff and partners. *Jurisdiction staff will be expected to review and provide feedback on draft materials, and oversee distribution (including any print production).*



21 Elements

4. FULL Package – Housing Element Development, Review and Approval

Overview Develop the complete housing element draft; provide support for needed regulatory changes to support the updated element as well as continued public engagement; and help facilitate timely review by HCD in order to achieve final adoption by January 2023.

Timing *July 2021 through January 2023 (19 months)*

Cost *\$30,000 per jurisdiction (full cost \$45,500, w/ \$15,500 covered by C/CAG & DOH) (assumes full participation)*

- Core Tasks**
- a** Develop the site inventory summary, and assist with Housing Element goals, policies, programs and quantified objectives to respond to local housing needs and meet state requirements.
 - b** Present at a community workshop, Planning Commission session and City Council meeting on local housing needs, key opportunities, and proposed policy strategies (assumes 60 hours of outreach support).
 - c** Assist with rezoning, General Plan and other land use changes (assumes 60 hours of support; can be reallocated to other tasks if not needed).
 - d** Work with staff to prepare Draft and Final Housing Elements and attend public hearings.
 - e** Continue to facilitate consultation and review with HCD.
 - f** Provide support on special issues analyses and CEQA documentation.

- Products**
- ✓ Draft Housing Element goals, policies, programs and quantified objectives
 - ✓ Presentation on local housing needs, opportunities and proposed policy strategies
 - ✓ Draft and Final Housing Elements

- City Roles**
- ▶ Collaborate in development of the housing element goals, policies, programs and quantified objectives. This includes writing and/or editing sections.
 - ▶ Continue to schedule and lead local engagement activities with 21E support.
 - ▶ Lead rezoning efforts and other regulatory changes (ordinance revisions, etc.) with 21E support.
 - ▶ Participate in jurisdiction-specific consultations with HCD.
 - ▶ Collaborate on special issues analyses and CEQA documentation, as needed.
 - ▶ Review and provide feedback on draft and final work products.
 - ▶ Engage other staff and departments to provide relevant data and reviews.
 - ▶ Organize and attend public hearings.

City Time 60+ hours a month over the course of 19 months



21 Elements

FULL PACKAGE - Task Descriptions

4a Assist with Site Inventory Write-up; Develop Goals, Policies, Programs and Quantified Objectives.

The 21 Elements team will partner with jurisdiction staff to summarize and present their site inventory, using the HCD-provided tool. The team will also assist in staff in identifying and developing the goals, policies, programs and quantified objectives of the housing element, drawing upon and responding to the results of the previous analyses to ensure a comprehensive pro-housing approach that facilitates the creation of new units consistent with established RHNA targets and affirmatively furthers fair housing. *Jurisdiction staff will be responsible for working in partnership to enter the site inventory data and summarize the data in table and narrative format using provided templates; and assist in prioritizing and developing the draft element's goals, policies, programs and quantified objectives.*

4b Present at Community Workshop, Planning Commission and City Council. The 21 Elements team will work with jurisdiction staff to develop a presentation that summarizes the draft housing element's context, analysis and priority actions. 21 Elements will also participate in making the presentation at one community workshop, one planning commission meeting and one City Council session and support staff in responding to questions. The presentation will also be accompanied by presentation notes to support use by staff and partners in other settings. *Jurisdiction staff will be responsible for reviewing draft and final presentation materials; participating in the three core presentations; and helping with distribution of the presentation to others or making the presentation to other audiences, as needed.*

4c Assist with Rezoning, General Plan and Other Land Use Changes. The 21 Elements team will support jurisdiction staff in evaluating and prioritizing implementation work tasks for enacting needed changes to zoning, development standards and/or other changes needed to ensure certification of the housing element and accomplishment of its goals and objectives. This task will also include identification of other general plan policies that may need to be modified to ensure consistency with the updated housing element. The budget for this task does not provide the necessary support to undertake rezoning work or to rewrite standards (and related environmental analyses), but is intended to provide needed support for decision making, scoping and development of the implementation work program. *Jurisdiction staff will be responsible for taking the lead on implementation task planning, decision making and action, supported by the 21 Elements team.*

4d Assist in Preparation of Draft and Final Elements; Attend Public Hearings. The 21 Elements team will work with jurisdiction staff to compile the complete Draft Housing Element for public review and submittal to HCD. The formatted document will be made available as a web-based pdf as well as in hard copy to facilitate community review and input. Staff from 21 Elements will also be available to attend up to two public hearings on the draft element to provide an overview of the document and help answer questions. *Jurisdiction staff will help develop the draft element and provide review and feedback on portions developed by the 21 Elements team. Staff will take the lead on public hearings related to review and input on the draft document, supported by 21 Elements as described above.*



21 Elements

- 4d Facilitate HCD Consultations.** Building off the work of Task 3e, the 21 Elements team will engage HCD staff during the final phase of the update, including but not limited to supporting staff in making the official submittal for review and certification by HCD and participating in review phone calls, as needed. As in 3e, the approach is intended to help ensure “no surprises” and to facilitate HCD staff’s familiarity with the key issues being addressed as well as the policy strategies being pursued prior to submittal to ensure they will meet the bar for certification. *Jurisdiction staff will be expected to participate in direct conversations with HCD staff, facilitated by the 21 Elements team; make the formal submittal to HCD; participate in review discussions; and be responsive to information requests as needed.*
- 4e Provide Support on Special Issues and CEQA Documentation.** The 21 Elements team will support jurisdiction staff in addressing other issues of special concern that may arise, contributing to staff reports and other meeting materials as needed, and determining the necessary CEQA documentation for the final draft housing element. The budget for this task does not include the time needed to develop the actual CEQA documentation, but will likely rely substantially on CEQA analysis and documentation developed in relation to task 4c. *Jurisdiction staff will take the lead on these task areas, with support from the 21 Elements team.*



21 Elements

IV. Process Overview and Schedule

The diagram on the next page illustrates the sequence of core work tasks and general schedule for the 21 Elements/ RHNA 6 work effort.



21 Elements and RHNA 6 process overview

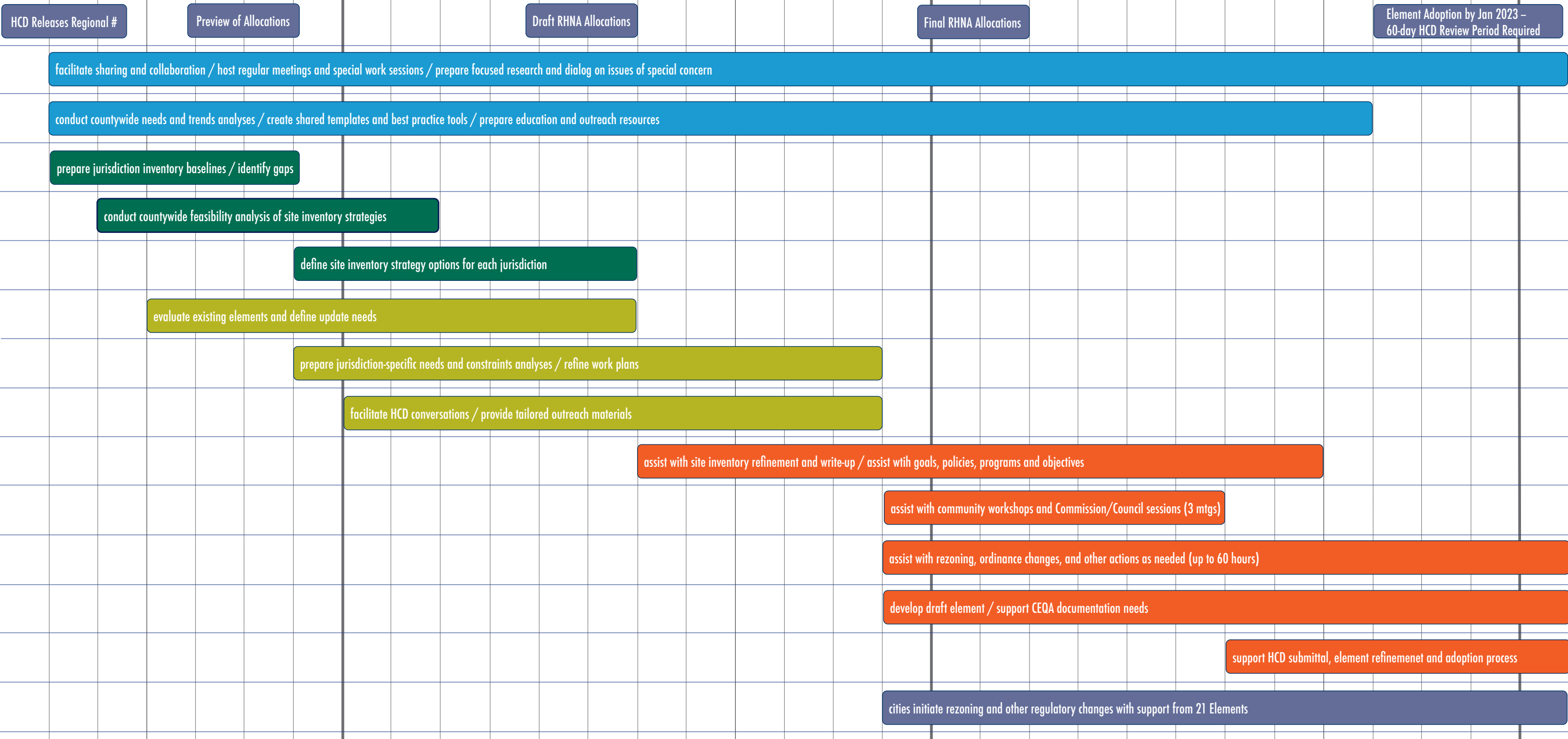
BASE PACKAGE

GETTING STARTED PACKAGE

FOUNDATIONS PACKAGE

FULL PACKAGE

July 2020 August September October November December January 2021 February March April May June July August September October November December January 2022 February March April May June July August September October November December January 2023



PHASE 1 - EVALUATING SITE INVENTORY STRATEGIES AND DEVELOPING EACH JURISDICTION'S HOUSING ELEMENT WORK PLAN

PHASE 2 - HOUSING ELEMENT UPDATES / REZONING AND ORDINANCE CHANGES / REVIEW AND ADOPTION

Element Adoption by Jan 2023 - 60-day HCD Review Period Required

ATTACHMENT C – PROPOSER GUARANTEE

The proposer certifies it can and will provide and make available, as a minimum, all services set forth in this RFP under the section titled "Services Required."

Signature

Date

Printed name

Title

Firm name

ATTACHMENT D – PROPOSER WARRANTIES

The proposer warrants that:

- It is willing and able to comply with State of California laws with respect to foreign (non-state of California) corporations.
- It is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees or agents in conjunction with the services to be provided. Coverage limits shall be \$5,000,000 or more, per occurrences and a minimum of \$15,000,000 in aggregate without reduction for claims paid during the policy period. The carrier should be duly insured and authorized to issue similar insurance policies for this nature in the State of California and rated B+ or higher by A.M. Best or an equivalent level through a similar rating agency.
- It will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of Menlo Park.
- All information provided by it in connection with this proposal is true and accurate.

Signature

Date

Printed name

Title

Firm name

M-GROUP PROPOSAL HOUSING ELEMENT UPDATE

PRESENTED TO
CITY OF MENLO PARK
IN RESPONSE TO REQUEST FOR INTERVIEW



TABLE OF CONTENTS

INTRODUCTION 1

PROJECT TEAM 3

SCOPE OF WORK 9

SCOPE ASSUMPTIONS 55

BUDGET 57

SCHEDULE 63

APPENDIX A - Think

APPENDIX B - Resumes

APPENDIX C - RFP Attachments

m-group.us
a new design on urban planning

SUBMITTED BY **M-GROUP**
FEBRUARY 26, 2021

51 E. CAMPBELL AVENUE #1247
CAMPBELL, CA 95009



GROUP



FIRM PROFILE

M-Group exists to bring innovative and effective planning solutions to Bay Area cities. Since the creation of the firm in 2006, we have brought the full range of planning services to over 65 Bay Area communities.

We are committed to *a new design on urban planning*. This approach to planning takes many forms both in our work and in our relationships with our clients. This new design includes:

- Very clear communication
- An enthusiastic and fun approach to planning
- A commitment to continuous improvement
- Creating a sustainable future by balancing the needs of the natural and built environments
- Creating a long-lasting, employee-centered, client focused firm

M-Group planners have extensive experience working on complex and high-profile projects throughout the region. Our planning group brings together a broad range of planning expertise and substantial real-world experience to help cities plan for the future.

Our team of 40 planners is focused on delivering the following services:

- POLICY PLANNING
- URBAN DESIGN
- ENVIRONMENTAL REVIEW
- HISTORIC PRESERVATION
- COMMUNITY ENGAGEMENT
- STAFFING SOLUTIONS



● **CAMPBELL**
408.340.5642
51 E. Campbell Avenue
#1247
Campbell, CA 95008

● **SANTA ROSA**
707.540.0723
499 Humboldt St
First Floor
Santa Rosa, CA 95404

● **HAYWARD**
510.473.3090
22561 Main St
Suite 200
Hayward, CA 94541



M-GROUP *a new design on urban planning*

policy planning • urban design • environmental review • historic preservation • community engagement • staffing solutions

February 26, 2021

Deanna Chow
Assistant Community Development Director
City of Menlo Park
701 Laurel Street
Menlo Park, CA 94025

RE: REQUEST FOR PROPOSAL—HOUSING ELEMENT UPDATE

Dear Deanna Chow,

M-Group is pleased to provide a detailed proposal including scope, budget, and schedule to follow up our Statement of Qualifications (SOQ) for the Housing Element for the 2023-2031 planning period, General Plan updates (including Land Use, Safety, and Environmental Justice), associated rezoning actions, environmental impact report (EIR) and fiscal analysis.

The City is seeking a partner to create a transformational, community-supported planning process and documents that focus on some of today's most pressing issues – affordable and equitable housing, environmental justice and equity, City fiscal sustainability, and resilience. We stand ready to work with the city to address these and other challenges to create a Housing Element and General Plan updates that respect the city's history, the values of today's residents and prepares the entire community for a future they have helped to shape.

The details of our proposal demonstrate M-Group's understanding and competence in managing a project of this scale and our plan to guide the City of Menlo Park through the complex planning process. M-Group's highly experienced team of staff and subconsultants will work closely with City staff, stakeholders, and the community to produce quality documents that will impact the future of the City and compliant with all state requirements.

Our team will be led by Principal Geoff I. Bradley, AICP as Project Manager and Principal Planner Sung H. Kwon, AICP as Deputy Project Manager. Additional key team members include Principal Policy Planner Christina Paul, AICP, Director of Urban Design Tom Ford, AICP, Principal Planner Payal Bhagat, and Senior Planner Justin Shiu, AICP. Included in our team are highly respected subconsultants BAE Urban Economics (BAE) for fiscal analysis, Environmental Science Associates (ESA) for CEQA analysis, and Hexagon Transportation Consultants (Hexagon) for transportation analysis.

We feel that our experience serving Menlo Park and our knowledge of the character of the community and local policies will be a great asset in streamlining the Housing Element Update process as best possible, and we very much look forward to working with you.

If you have any questions or would like to discuss any aspect of our proposal please do not hesitate to contact us.

Sincerely,

GEOFF I. BRADLEY, AICP

Principal + President

gbradley@m-group.us

408.340.5642 x102



page left blank



INTRODUCTION

The City of Menlo Park last adopted its Housing Element in 2014. Since then the State of California and many local cities, including Menlo Park, have brought increased attention to the ongoing affordable housing crisis and to social equity and environmental justice issues. For this, the 6th RHNA cycle, the State has not only significantly changed the requirements on Housing Elements to ensure greater affordable housing development feasibility, and to place greater responsibility on cities to promote development, but also increased RHNA allocations and added a requirement that qualifying cities develop an Environmental Justice Element. While these changes mean that 6th cycle Housing Element planning processes will not be “business as usual,” they also give communities the opportunity to have thoughtful and impactful discussions about how they would like to evolve to support current and future residents.

Menlo Park has already made strides in getting ready for the Housing Element update. The City has identified areas for residential development in the Bayfront Area that are not included in the current Housing Element Sites Inventory and has made the Housing Element a top priority of the City Council. Like many cities in the Bay Area, Menlo Park does not include a great deal of vacant land or open space on which to put new housing, and what open space there is is often highly valued. In this environment, the City is turning to infill development opportunities, which can include densification of major corridors, such as El Camino Real, redeveloping surface parking lots, and looking for ways to equitably distribute housing in high-opportunity areas, such as through an Accessory Dwelling Unit program, amongst other options.

M-Group stands ready to partner with Menlo Park to serve as an extension of staff, provide technical expertise, and meaningfully engage the community to shape a positive and holistic vision for the future of housing and related elements in the city.

M-Group has a strong track record of completing Housing Element projects on time and budget. Our success is credited to the experience, skill, and strategy of our Project Managers,

the quality of our teams, and the ability to work seamlessly with City staff. Before starting a project, the Project Manager works closely with City staff to establish a detailed project schedule and mutually agreed-upon expectations. Our Project Managers are experienced in recognizing potential challenges and accounting for them in the planning process.

We carefully manage our staff planners' workload to be certain we have the staff capacity to serve the City for the project's duration. We are fully functional while working remotely and will come to City offices as needed for meetings or hearings. During the current Covid-19 situation, meetings and presentations will be held virtually utilizing videoconferencing. At such time that the Shelter-in-Place orders are lifted, and when it is mutually agreed upon, M-Group will provide in-person presence.

Although the Covid-19 pandemic has changed the look of Community Engagement, it has not changed its role as a vital task in a successful Housing Element Update. Our outreach efforts are intentional and designed to reach the broadest cross-section of residents and stakeholders. Groups that we have identified include persons with disabilities, people of color, lower-income groups, monolingual speakers, renters, students, families with young children, seniors, and veterans. It is our intention and goal to reach out to as many people as possible and hear all voices in the community. M-Group utilizes learned best practices, technology, and an earnest desire to do right by the community which the end product documents will serve.

Our site selection method will use GIS and data analysis to support both the Outreach process and the development of the land use alternatives. To assist the Planning Commission with preferred land use decisions, we will provide fiscal and VMT analysis of the three options in addition to the public outreach input.

Due to the complexities and expected challenges with this effort, M-Group founding principal Geoff Bradley will serve as both Principal-in-Charge and Project Manager, supported by Sung Kwon as Deputy Project Manager. Tom Ford has been added to lead the Objective Design Standards effort as an optional task.

PROJECT TEAM

M-GROUP TEAM BIOS - SEE APPENDIX B FOR FULL RESUMES

GEOFF I. BRADLEY, AICP | *PRINCIPAL-IN-CHARGE + PROJECT MANAGER*



Oversight of project to ensure milestones are met and project is on budget

Geoff has nearly 30 years of professional public and private experience working with a variety of architectural, planning and public agencies. Since founding M-Group in 2006, Geoff has worked with over 35 Bay Area cities. His work includes long range policy planning focused on General Plans, Specific Plans and numerous Housing Elements, and Zoning Codes. Geoff has over five successfully certified and adopted 5th Cycle Bay Area Housing Elements to his credit. His experience also includes downtown revitalization, major commercial, residential, mixed-use and transit-oriented projects. Geoff is a creative problem solver who engages fully with the community in his planning work.

SUNG H. KWON, AICP | *PRINCIPAL PLANNER + DEPUTY PROJECT MANAGER*



Comprehensive project management

Sung has over 15 years of experience as City Planner. His expertise encompasses policy development, environmental analysis, data analysis, and fiscal analysis. Sung is a former Community Development Director and he has directed and managed a wide variety of complex projects throughout the Bay Area and other parts of California. In addition to managing the preparation of the Tulare County Housing Element (5th cycle, 2014-2023), he has also authored a variety of Community Plans and Environmental Impacts Reports. Sung has indirectly managed over 50 staff members (across multiple departments) and consultants for the implementation of a GIS based Permit Tracking System.

In addition to teaching Urban Design at San Jose State University and Cal Poly, San Luis Obispo, Sung has won awards in Outreach, Affordable Housing, Policy Development, Technology, and Marketing. Sung is a creative thinker with a sensible and detail-oriented approach. He thrives on providing innovative, data driven solutions to complex planning issues.

CHRISTINA PAUL, AICP | *PRINCIPAL POLICY PLANNER*

Lead Community Outreach

Christina's professional planning background encompasses a variety of extensive projects including Pacifica's General Plan, YouTube headquarters in San Bruno, Chabot Las Positas Community College District Facilities Master Plan (Hayward/Dublin/Livermore), Downtown Long Beach Associates Strategic Plan, and a Strategic Master Plan for the Trinity River in Fort Worth, Texas. She is a talented project manager and team motivator who emphasizes clear communication, thoroughness and creativity. Christina balances her analytical approach with ingenuity to produce comprehensive, inventive, and forward-thinking solutions. Her urban planning expertise is supplemented by graphic design and GIS skills.

TOM FORD, AICP | *DIRECTOR OF URBAN DESIGN*

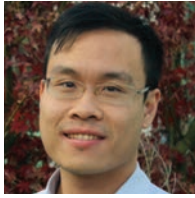
Lead Objective Design Standards

Tom's professional planning career spans more than 20 years and a variety of unique clients, experiences, and locations – both in California and overseas in Asia. Tom will be the Project Manager for the Objective Design Standards effort and will be the City's primary point of contact. Tom previously worked on developing objective design standards for the City of Lafayette. Tom is presently preparing the development standards to implement pedestrian-oriented, mixed-use development along the El Camino Real corridor in Sunnyvale. Tom has a deep portfolio of design guideline experience, from historic, pedestrian-oriented town centers, such as the Irvington Concept Plan for the City of Fremont, to the city-wide Design Standards and Guidelines for the City of Livermore. At a previous firm, Tom was the Project Manager and lead author for the award-winning Designing for Smart Growth: Creating Great Places in the San Diego Region for SANDAG.

PAYAL BHAGAT | *PRINCIPAL PLANNER*

Support Housing Needs Analysis and Site Selection

Payal has been a consulting planner with Menlo Park for over six months working on several large residential projects in the Bayfront area. She has developed a rapport with City staff and understanding of the community which will be invaluable to the the Housing Element process. In addition to her insight specific to Menlo Park, Payal has a wealth of knowledge developed from over 13 years in the planning field. She has an exceptionally strong management background having been lead planner and/or project manager for many projects ranging from zoning code updates to large scale developments. She has frequently served as liaison to commissions, and committees bridging the conversation between departments with her broad planning background and ability to build strong professional relationships. She has developed successful climate action plans, led multi-jurisdiction projects such as the Lawrence Station Area Specific Plan; a transit-oriented development straddling the cities of Santa Clara and Sunnyvale.

JUSTIN SHIU, AICP | SENIOR PLANNER

High level support to preparation of all documents

Justin brings experience in a variety of current and long-range planning assignments. His assignments in long-range planning have included several Housing Elements in the 5th cycle, General Plan progress report preparation, zoning code updates, land use mapping, and development of design guidelines. Justin has played an integral part in developing environmental documents and policy documents for long-range planning projects around the Bay Area. He has worked on the preparation of Initial Studies for a variety of projects and EIR addenda for General Plan Amendments.

BAE TEAM BIOS - SEE APPENDIX B FOR FULL RESUMES

MATT KOWTA, MCP | BAE MANAGING PRINCIPAL

For the past 29 years, Matt has pioneered innovative techniques in economic analysis to meet the challenges of contemporary urban development. Matt oversees BAE operations spanning all five 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.

STEPHANIE HAGAR, MCP | BAE PROJECT MANAGER

Stephanie provides strong leadership and project management to BAE engagements throughout the western US. She has extensive experience with workforce and affordable housing studies, along with deep expertise in financial feasibility, fiscal impact, economic impact, and market studies. 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.

CHELSEA GUERRERO, MCP | BAE SENIOR ASSOCIATE

Chelsea brings a strong background in housing and economic development to BAE. She is familiar with econometric statistical modeling and specializes in detailed analysis for public policy planning. Chelsea provides market, feasibility, and fiscal impact analyses for BAE projects throughout California. She has extensive experience preparing market, feasibility, and fiscal impact analyses to inform long-range planning decisions and the evaluation of proposed development projects in the Bay Area.

MIKI KOBAYASHI | *BAE SENIOR ANALYST*

Miki provides high quality research and analytical support for BAE's full range of consulting assignments. Miki's recent experience includes data collection and analysis for a series of General Plan Updates, including for Contra Costa County, Glenn County, and the City of Sacramento, as well as a Real Estate Master Plan Update in Alameda County.

ESA TEAM BIOS- SEE APPENDIX B FOR FULL RESUMES**HILLARY GITELMAN** | *ESA PROJECT DIRECTOR*

Hillary leads ESA's Bay Area Environmental Planning group with more than 25 years of experience working with a variety of Bay Area agencies and organizations for planning and environmental review projects. While at ESA, she has supported project managers responsible for the preparation of EIRs in compliance with CEQA on projects such as the Downtown West Mixed Use Plan in the City of San Jose. While in the public sector, Hillary lead efforts to update Housing Elements for the County of Napa and the City of Palo Alto, and prepare required CEQA documents. Her extensive experience in the public sector and in the preparation of housing elements and CEQA documents will be invaluable to the team.

LUKE EVANS | *ESA CONTRACT LEAD AND PROJECT MANAGER*

Serving as the Project Manager and Task Lead for the Draft Program EIR, Luke Evans brings more than 20 years of experience of environmental document preparation for a wide range of environmental fields. His work on CEQA and NEPA documentation throughout the Bay Area include residential and commercial projects, as well as roadway and transit projects. He was a project manager for similar projects such as the General Plan EIRs for the City of Eureka and County of Humboldt, the Alameda Marina Master Plan EIR, and Grandpark Specific Plan EIR. Over the last few years, Luke has developed a specialty in preparing NEPA and CEQA documents for affordable housing projects in the City of San Francisco and Sacramento, with thousands of units successfully moved through the approval process.

JILL FEYK-MINEY | *ESA DEPUTY PROJECT MANAGER, LAND USE AND PLANNING, PUBLIC SERVICES AND RECREATION*

Jill, the proposed Deputy Project Manager, has assisted in the preparation of several CEQA and NEPA documents in the East Bay for residential, commercial, industrial, transportation and infrastructure projects. Her specialties include air quality modeling/analysis and wetland and jurisdictional delineations. Her role as deputy project manager in previous projects for clients such as the City of Oakland and the City of Mountain View has furthered her technical expertise in CEQA documentation.

HEXAGON TEAM BIOS- SEE APPENDIX B FOR FULL RESUMES

GARY K. BLACK, AICP | *HEXAGON PRESIDENT*

Gary is the President of Hexagon and has over thirty-eight years of experience in transportation engineering. Mr. Black has worked on a number of transportation planning, traffic engineering, parking, and transit studies. He has prepared traffic studies for EIRs for over 100 development and policy projects throughout the Bay Area.

OLLIE ZHOU, T.E. | *HEXAGON VICE PRESIDENT + PRINCIPAL ASSOCIATE*

Since joining Hexagon in January 2014, Mr. Zhou has worked on projects for multiple municipalities and private development throughout the greater San Francisco Bay Area. These projects include travel demand model validation and application for general plan updates and area plans, traffic impact studies, site traffic analyses, parking studies, and multi-modal roadway segment analysis. Mr. Zhou is proficient in TRAFFIX, Synchro, SimTraffic, Cube, ArcGIS, Word, and Excel.



page left blank



WORK PLAN OVERVIEW

The process to develop the Housing Element Update is comprised of five major task items which are further detailed by subtasks, optional tasks, and deliverables. The Scope, Budget and Schedule are all structured on the following five prime tasks:

TASK 1 - Project Administration

TASK 2 - Community Engagement Strategy

TASK 3 - Housing Element and Related Work

TASK 4 - Environmental Justice and Safety Element

TASK 5 - Environmental, VMT and Fiscal Reviews

TASK 1 | PROJECT ADMINISTRATION

Task 1.1. Project Kick-off Meeting

M-Group will prepare for and attend a kick-off meeting to exchange information and initiate work on the Housing Element update. During the project kick-off meeting, M-Group will 1) Review the scope of work and schedule and refine with City staff, 2) Discuss project communication and possible meetings with City staff and/or other organizations, and 3) reporting and deliverables, 4) provide a list of data needs. The meeting will also serve to discuss project expectations regarding coordination, reporting, deliverables, community outreach and relevant information. The meeting may be held remotely based on current public health directives.

Deliverable(s): Kick-off meeting agenda and data needs list (electronic copy in PDF)
Meeting Summary (electronic copy in PDF)

Task 1.2. Finalize and Update Schedule

M-Group will prepare a detailed schedule with milestones and dates for completion of tasks. Monthly updates will also be provided in the schedule. In the event of project delays, we will advise the City's project manager on the strategies to correct and mitigate. The schedule will reflect tasks and milestones for certification of the Housing Element to the State HCD by December 15, 2022, and related project components.

Deliverable(s): One (1) final Schedule in MS Excel

Task 1.3. Project Management and Coordination

M-Group will communicate with City staff via telephone, video conferencing, and email throughout the project to ensure objectives and milestones are being achieved. It is assumed that there will be regular meetings (approximately every two weeks) with Planning staff, including staff with other departments and organizations. M-Group will provide regular email progress reports to the City project manager. M-Group and City staff will maintain an online file transfer folder on Box (or other agreed-to platform) for all project materials, which will be accessible to City staff and consultants. We will coordinate with 21 Elements to ensure a cohesive product.

Deliverable(s): Bi-weekly calls with City staff (1 hour each call)
Other scheduled calls/meetings
Agendas for calls/meetings with City staff (electronic copies in PDF)
Call summaries with follow up items (electronic copies in PDF), M-Group staff will type notes during meetings
Set up document sharing folder

Task 1.4. Coordination with HCD

M-Group will coordinate with HCD for the adoption of the housing element throughout the project. M-Group will utilize any HCD consultation work completed by 21 Elements.

Deliverable(s): Written call summaries or correspondence with HCD (electronic copies in PDF)

Task 1.5. Monthly Advisory Group Meetings (Optional)

Creation of an advisory group has both benefits and challenges. We provide the following considerations for the formation of an advisory group:

- Developing an advisory group would take some time. The larger the group the longer it will be to find people to serve on the group. By the time the advisory group is created, the outreach would have started.

- The size of the group is also a consideration. A small group is easier to schedule meetings, while larger group would provide more perspectives. A larger advisory group may be more appropriate for projects that have a longer outreach timeframe.
- Deciding on the makeup of the group is somewhat tied to the size of the advisory group. There may be a variety of people who would like to be on the advisory group, and there may be pressure to make the advisory group too large.
- Time to getting people seated on the group
- Determining the role of the advisory body
- Length of the advisory group's role
- Scheduling challenges depending on the size of the group

Due to the fairly tight schedule, we do not recommend creating a new advisory group. We believe that the Housing Commission could serve as an effective advisory group. The Housing Commission's role and responsibilities are very much aligned with being an advisory group for the Housing Element update. Additionally, utilizing a standing commission rather than creating an ad-hoc committee would save time and budget. The Housing Commission has received recent updates on the RHNA allocation process, ADU policies and other pertinent housing issues. M-Group would provide monthly progress reports to the Housing Commission and gain feedback at their regular or special meetings as necessary. M-Group anticipates that City staff would prepare public notices and agendas while M-Group would prepare meeting memos and/or staff reports for the Housing Commission meetings.

Deliverable(s): Monthly reports to the Housing Commission
Visual presentations (PowerPoint)

TASK 2 | COMMUNITY ENGAGEMENT STRATEGY

M-Group is dedicated to effective community outreach and engagement. We use proven methods and are always developing new tools for engagement, including online tools, videos and physical exercises to broadcast and elicit ideas. We are assuming that initial outreach for this plan will be conducted virtually due to the Covid-19 pandemic. Our outreach approach draws from experience leading and facilitating complex planning processes as well as serving as City staff. Visual tools for envisioning changes to the city will be developed graphically for understanding by everyone. The core team are seasoned facilitators of public meetings who will tailor the approach to speak to a range of audiences through multiple media.

Focused and meaningful community engagement is an integral part of the Housing Element Update process both because it leads to a higher-quality, implementable plan, and because it's required by the State. Government Code 65583(c)(7) requires: "The local government shall make a diligent effort to achieve public participation of all economic segments of the community in the development of the housing element, and the program shall describe this effort." This is a crucial component towards developing inclusive and equitable housing strategies.

M-Group will develop a tailored community outreach program designed to reach all segments of the community, including disadvantaged people and others who find it challenging to engage with local government. Our comprehensive outreach approach could include, but is not limited to community-wide and focus group meetings, website materials, online surveys, and other techniques to ensure broad participation of the affected public, including language interpretation and translated materials.

The following table summarizes the plan to ensure various groups are engaged in the process.

Outreach Strategies

Group	Strategy
Monolingual speakers	<ul style="list-style-type: none"> • Flyers, Survey, and Website provided in Spanish • Individual Phone calls with translation services • Website with translation to a variety of languages • Partner with local advocacy groups on translation services
Lower income groups	<ul style="list-style-type: none"> • Flyers and outreach materials provided to Social Service Providers and advocacy groups • Partner with Religious Organizations as many of these organizations represent a diverse group of people
People of color	<ul style="list-style-type: none"> • Have community outreach meetings in all neighborhoods/Council Districts • Partner with specific local advocacy groups to spread message • Involve local advocacy groups in the public outreach process. This allows for a higher level of trust when the advocacy groups are part of the outreach effort • Partner with local advocacy groups for translation services
Renters	<ul style="list-style-type: none"> • Obtain multifamily building addresses from the San Mateo County Assessors office to provide outreach to renters • Obtain single family home addresses which are not owner occupied. This will list will provide house rentals • Develop a list of ADU addresses to also add to the renters list • City staff can mail bilingual flyers to these addresses
Students	<ul style="list-style-type: none"> • Flyers will be provided to local schools to assist with reaching families with young children • Flyers will be distributed to the local libraries • Flyers will be distributed to local universities and community colleges

Families with young children	<ul style="list-style-type: none"> Flyers will be provided to local schools to assist with reaching families with young children Flyers provided to daycare facilities Flyers will be distributed at the local farmers' markets
Seniors	<ul style="list-style-type: none"> Flyers will be distributed to senior centers, senior living facilities, and local community colleges with adult learning classes Flyers will be distributed to the local libraries
Veterans	<ul style="list-style-type: none"> Provide information to the local US Department of Veteran Affairs
Physically disabled	<ul style="list-style-type: none"> Ensure that all in person meetings are handicap accessible and have handicap parking
Hearing Impaired	<ul style="list-style-type: none"> Provide closed captioning for virtual meetings and sign language translator on-request at in-person meetings
Visually impaired	<ul style="list-style-type: none"> Encourage the use of "Be My Eyes" app

Task 2.1. Community Engagement Plan

In collaboration with City staff, M-Group will draft an innovative and inclusive community engagement plan that emphasizes contacting groups that are traditionally under-represented in a public outreach process, such as non-English language speakers, evening-time workers, people of color, renters, students, businesses, seniors, families with young children, and other groups. The outreach will address affirmatively furthering fair housing (AFFH) opportunities and environmental justice. M-Group will use web-based tools to supplement outreach as part of community engagement. M-Group will work with the City to provide outreach and community engagement that accommodates traditionally hard-to-reach populations within the community.

For all community engagement and public meetings, M-Group will facilitate meetings, as needed, and produce relevant display materials and handouts for the public meetings in English and Spanish. M-Group will also create detailed written meeting notes for distribution. City staff will be responsible for scheduling, coordinating, noticing, facilities, and set-up for the public meetings. The Community Engagement Plan will include a list and all planned outcomes of all expected meetings, event and activities.

Deliverable(s): One (1) electronic copy (MS Word) of the Community Engagement Plan
 One (1) electronic copy (PDF) general fact sheets
 Attend at One (1) Joint Housing Commission/Planning Commission Meeting

Task 2.2. Webpage

M-Group will create and maintain a project web page that collects all comments, GIS resources, project documents, current activities/calendars, surveys, and links to related agencies and non-profits. The webpage will be designed to receive comments from the public throughout the Housing Element Update process, including the Public Review Draft of the Housing Element and Environmental Documents. M-Group will also create and maintain an email distribution list (master contact list) for providing project updates as outlined in Task 2.3.

Deliverable(s): One (1) webpage (in English and Spanish)

Task 2.3. Master Contact List

M-Group will develop and maintain a master contact list for the distribution of materials, meeting notices and announcements. As part of the Master Contact List, we anticipate providing information to various organizations and request that they further distribute information to their individual contact lists. The list will include the Housing Authority of the County of San Mateo, Housing Advocates, Schools, Libraries, Recreation Center, Religious Organizations (in and near Menlo Park), Community Groups, Major Employers, Senior Centers, and Survey respondents.

Deliverable(s): One (1) master contact list in MS excel format

Task 2.4. Partner with Local Non-Profit Community Groups

As part of the overall outreach approach, M-Group will partner with local non-profit community groups and involve them in the outreach program. We would also ask for their assistance with translation services.

Deliverable(s): Involve non-profit community groups in the outreach process

Task 2.5. Social Media

M-Group will create and maintain a Facebook Page in English and Spanish for this project. M-Group will also maintain a Twitter account in English and Spanish for this project. We will periodically provide updates on these social media platforms regarding outreach and project milestones.

Deliverable(s): Two (2) Facebook page (English and Spanish)
Two (2) Twitter accounts (English and Spanish)

Task 2.6. Electronic Media

M-Group will develop email blasts and social media blurbs to provide consistent communication with individuals on the master contact list.

Deliverable(s): Various email blasts and social media blurbs

Task 2.7. Print Media/PDF Utilization

M-Group will utilize flyers prepared by 21 Elements. M-Group assumes 21 Elements will provide flyers in English and Spanish. M-Group assumes that the City will mail out the Flyers or print out hard copies to be distributed to various organizations. Flyers will be used in the following ways:

- M-Group will work with City staff to obtain multifamily building addresses from the San Mateo County Assessor’s office to provide outreach to renters. City staff can mail flyers to these renters.
- M-Group will work with City staff to obtain single-family home addresses which are not owner occupied. This will list will show addresses house rentals. City staff can mail flyers to these renters.
- M-Group will work with City staff to get a list of known ADU address to also add to the renters list. City staff can mail flyers to these renters.
- Provided to local schools to assist with reaching families with young children.
- Distributed to senior centers, senior living facilities, and local community colleges with adult learning classes.
- Distributed to the local libraries to be provided to their mailing lists.
- Provided to all religious organizations, as religious organizations can have a spectrum of economic classes.
- Provided to the local US Department of Veteran Affairs
- Provided to Major Employers
- Provided to Daycare Facilities
- Provided to Park and Recreation List
- Provided to Social Service Providers
- Distributed to all individuals and organizational contacts in our Master Contact List.
- Provided to all City facilities including the Belle Haven Neighborhood Service Center
- Boys and Girls Club of the Peninsula (Belle Haven)

M-Group will utilize Posters (in English and Spanish) provided by 21 Elements. We assume City staff can print posters and assist with distributing posters to the following places: Grocery Stores, Goodwill, Walgreens, Menlo Park Library, Post Office, Local Hospitals and Clinics

Deliverable(s): Assist City staff with various tasks regarding the distribution of print material

Task 2.8. General Survey

M-Group will develop a survey in conjunction with City staff to gain information about the community, housing needs, housing related concerns, and issues that may not be readily

evident. This survey will be provided in English and Spanish (with other languages upon request). Results of the survey will be available on the website.

Deliverable(s): One (1) electronic survey (In English and Spanish)

Task 2.9. Housing Introduction Seminar

M-Group will provide a Housing Introduction Seminar online for people who want to understand Housing Issues in Menlo Park. This would be done in conjunction with 21 Elements. This seminar would also outline the major themes of the housing element update.

Deliverable(s): One (1) virtual housing introduction seminar

Task 2.10. Focus Groups

M-Group will work with City staff to identify appropriate community groups or other interest groups to engage as focus groups early in the planning process. We will conduct up to five (5) focus groups for groups up to ten participants as part of the Community Engagement at the beginning of the outreach program. One of the focus groups will include the San Mateo County Housing Authority and housing advocates. Meetings will be visually recorded and facilitated in Miro, an online whiteboarding tool. Real-time polling can be used in these stakeholder meetings.

Deliverable(s): Five (5) Focus Groups
Notes for each stakeholder meeting

Task 2.11. Individual Interviews

M-Group will conduct up to twenty four (24) phone and/or video conference interviews as part of the community outreach. Individual interviews provides for communication with people who may have a difficulty speaking English, and translation services can be provided. Individual phone calls can provide flexibility when contacting people with disabilities. In addition, individuals without reliable internet access may be able to provide comment over the phone.

Deliverable(s): Up to twenty four (24) individual interviews, with translation services
One (1) electronic copy (MS Word) of the notes for each interview

Task 2.12. General Outreach Meetings by Council District

M-Group will conduct up to five (5) general outreach meetings, one for each council district. Possible locations for outdoor outreach meetings could include: Government centers, farmers' markets, parks/outdoor public spaces, schools, community centers, and libraries.

Deliverable(s): Up to five (5) general outreach meetings, with translation services
 One (1) electronic copy (MS Word) of the notes for each meeting interview

Task 2.13. Project Gallery

M-Group will work with City staff to prepare a gallery in a large conference room in the Library or other publicly accessible space (that is handicap accessible) or large room for the project. This would allow people to come and understand the project without internet access. This Gallery will have maps, a project website kiosk, a survey kiosk, comment box, posters, and project schedule. In addition, educational videos from the housing symposium can be provided. People would be able to come as go as is convenient for them during the hours of operation.

Deliverable(s): Assist City staff with setting up and maintaining a project gallery space

Task 2.14. Farmers’ Market Pop-up Booth

M-Group will host four (4) Downtown Farmers’ Market Pop-up booths. The pop-up booths will provide flyers, posters and other information about the housing element update and the outreach program. As an option (not included in this scope), additional pop-ups can be coordinated with the Menlo Park Chamber of Commerce events. To the extent the Belle Haven Market has transitioned to a drive-thru mobile farmers’ market, we would collaborate an appropriate method to participate with them.

Deliverable(s): Host four (4) pop-up booths at the farmers’ markets

Task 2.15. Preliminary Land Use Strategies Descriptions with Housing Commission

M-Group in conjunction with 21 Elements, will provide an overview of site selection and specific strategies to implement the RHNA allocation. We will outline different type of site selection options could including:

- Analyze ConnectMenlo Zoning Changes
- 5th Cycle site Reuse
- Accessory Dwelling Units
- Upzone Downtown/Downtown Parking Lots
- Upzone El Camino Real
- Housing Opportunities at Religious Facilities per AB 1851
- Convert Commercial Zoning to Mixed-Use
- Use micro units on sites less than 0.5 acre
- Upzone single family zones

We anticipate that the Housing Commission and the public will provide comment and feedback on the strategies presented.

Deliverable(s): Presentation at a special Housing Commission meeting for Land Use Strategies

Task 2.16. Housing Workshop

M-Group will develop and lead a housing meeting that would allow people to provide input on where housing should go. This meeting will not be about what the options are, rather this meeting will give people the opportunity to place housing units on the various sites with the strategies outlined at the Housing Commission meeting. We will use online tools such as “Maptionnaire Community Engagement Platform” to gain location-based feedback. We will summarize the comments at the end of the public workshop.

Deliverable(s): One (1) Community Workshop via video conference call, electronic agenda (pdf), and notes (MS Word) from the workshop

Task 2.17. Land Use Meeting with Planning Commission

M-Group present findings of the housing workshop to the Planning Commission. Comments from the Planning Commission would help form the three land use alternatives.

Deliverable(s): One (1) Planning Commission Meeting via video conference call, electronic agenda (pdf), and notes (MS Word) from the workshop

Task 2.18. Preliminary Land Use Alternatives: City Council

Based on the comments from the Housing Workshop and Planning Commission meeting, M-Group will prepare three (3) Draft Land Use Alternatives. These three (3) land use alternatives will be developed in conjunction with the Community Outreach and information provided by 21 Elements. Each land use alternative will have pros and cons for each alternative, a summary of total units achieved, zoning changes, and land use changes that would be required. This meeting would allow the City Council and the Public to provide feedback on the three alternatives. These alternatives would be adjusted appropriately for the Planning Commission Decision on the preferred land use alternative.

Deliverable(s): One (1) City Council Meeting via video conference call, electronic agenda (pdf), and notes (MS Word)

Task 2.19. Preferred Land Use Concept: Planning Commission Meeting

Based feedback on form the City Council Meeting, M-Group will provide three (3) land use alternatives for the Planning Commission. Each land use alternative will have pros and cons for each alternative, a summary of total units achieved, zoning changes, and land use changes

that would be required. In addition, our team will provide fiscal and VMT considerations for each alternative to assist with the decision making.

Deliverable(s): M-Group will assist in the facilitation of a PC workshop to decide on which land use concept to move forward on as the project description

Task 2.20. Draft Environmental Justice and Safety Elements to Planning Commission

M-Group will present the preliminary draft Environmental Justice Element, Safety Element to the Planning Commission for review and comment

Deliverable(s): One (1) Planning Commission Meeting via video conference call, electronic agenda (pdf), and notes (MS Word)

Task 2.21. NOP/Scoping Meeting at Planning Commission

M-Group will attend one Planning Commission meeting for the Notice of Preparation.

Deliverable(s): One (1) Planning Commission Meeting via video conference call, electronic agenda (pdf), and notes (MS Word)

Task 2.22. Draft EIR at Planning Commission

M-Group will attend one Planning Commission meeting for the Draft EIR.

Deliverable(s): One (1) Planning Commission Meeting via video conference call, electronic agenda (pdf), and notes (MS Word)

Task 2.23. Virtual Housing Symposium (Optional)

M-Group will plan and organize an online Housing Symposium to provide information about the process, housing issues, and the Housing Element Update. M-Group anticipates that Elected and Appointed Officials would be involved in the Symposium. Topics discussed at the “Let’s Talk Housing” Symposium could include:

- Housing Affordability
- RHNA Allocation
- Housing Assistance Programs
- Economics of Affordable Housing Construction
- GIS Data Analysis tools
- AFFH
- VMT and Housing

- Q & A Session
- Council Member Message Videos

We could also mix in stakeholder meetings during this symposium. M-Group, with the assistance of City staff, would contact a variety of organizations to be involved in this symposium.

Deliverable(s): One (1) day online symposium to discuss housing issues and potential solutions

Task 2.24. MTC/ABAG Site Selection Tool Assistance (Optional)

M-Group can assist City staff with the data input and use of this online tool as an extension of City staff.

Deliverable(s): M-Group assistance with MTC/ABAG Site Selection Tool

Task 2.25. Walking Tours (Optional)

M-Group can provide walking tours of areas where housing can be placed. Walking tours could include:

- Downtown
- Bayfront area
- El Camino Real
- Other as determined

Deliverable(s): Three (3) walking tours lead by M-Group and City staff

Task 2.26. Outreach Toolkit (Optional)

Local leaders and community ambassadors can help articulate concerns and bright ideas through casual conversations with friends and acquaintances. To capture this feedback, M-Group can train local leaders in running mini-workshops alongside the project team. Outreach toolkits shared with the community can extend the reach of engagement efforts and help identify innovative, place-based solutions to planning issues. M-Group will design the toolkits and train City staff and ambassadors on how to connect with and gather input from a variety of community members. Each toolkit will include an agenda, maps, prompting questions, comment cards, and presentations to be used at various engagement events.

Deliverable(s): Outreach Toolkits will be prepared electronically as a PDF and PDF inserts

Up to Ten (10) printed hard copy outreach toolkits will be provided

Task 2.27. Press Releases (Optional)

M-Group will provide draft three (3) press releases for the following major milestones/events. Press release anticipated include:

1. Outreach Program
2. Information about the Housing Symposium.
3. Information about Land Use Alternative Decision

Deliverable(s): Three (3) draft press releases for City staff in MS Word format

Task 2.28. Outreach App Development Assistance (Optional)

M-Group can assist City staff with finding an app developer for iOS and Android platforms. M-Group can also work the app developer on front end user Interface and functionality of the app.

Deliverable(s): Assistance with Outreach app development (Approximately 60 hours)

Task 2.29. Outreach Videos (Optional)

M-Group can assist City staff to coordinate with video producers for informational videos. M-Group can provide video topics, draft scripts, and presentation material. Costs will be based level of assistance desired for this task.

Deliverable(s): Assistance with Video production

TASK 3 | HOUSING ELEMENT AND RELATED WORK**Task 3.1. Document Review**

M-Group will review all applicable City, regional, and State documents pertaining to the Housing Element update, including but not limited to the City's Comprehensive Plan, Coordinated Area Plans, Zoning Ordinance, building codes, State Memos regarding Housing Element Requirements/Affirmative Furthering Fair Housing (AFFH), and any other City of Menlo Park and State housing policies and programs. We will provide a memo of documents that will need to be updated.

Deliverable(s): One (1) electronic Memo (PDF) outlining documents that need to be updated

Task 3.2. List of Current General Plan Policies and Programs

M-Group will develop a word document of all current General Plan (Connect Menlo) policies and programs by chapter. We will refer to this list for internal consistency with the General Plan and to note if any current General Plan policies needs changes or revisions. The 2015-2023 Housing Element Policies and Programs will be part of this General Plan Policies and Programs list and will be analyzed as part of the 6th Cycle Housing Element Update.

Deliverable(s): One (1) word document of the current General Plan (Connect Menlo) policies and programs

Task 3.3. Review and Evaluation of Current Housing Element

M-Group will work closely with the City staff and 21 Elements to determine the status, effectiveness, and appropriateness of the 2015–2023 Housing Element and the entire General Plan. M-Group will review and evaluate the current 2015-2023 Housing Element and Housing Work Plan to:

- Evaluate the status, effectiveness, and appropriateness of the current housing policies and programs and identify any barriers to implementation
- Evaluate the existing Housing Element in relation to current State housing laws and identify any omissions or deficiencies
- Preliminary analysis on General Plan policies to combat housing discrimination in compliance with the recently adopted affirmatively furthering fair housing state law

Deliverable(s): One (1) electronic copy (PDF) Baseline Report that summarizes the findings and identifies missing information, revisions needed, and critical issues requiring further analysis.

Task 3.4. Review the City's RHNA Allocation

M-Group will review the City of Menlo Park's RHNA allocation. This will include an analysis of previous RHNA construction, existing goals and policies, housing needs and projected needs, and an opportunities and constraints analysis. This will also include preliminary analysis on General Plan policies to combat housing discrimination in compliance with the recently adopted AFFH state law. M-Group will integrate 21 Elements templates and information as a starting point for this review.

Deliverable(s): One (1) Baseline Review report in MS Word and PDF

Task 3.5. Review City's Vacant and Underutilized Land Inventory

M-Group will review the City's vacant and underutilized land inventory based on the 21 Elements inventory. We will augment this information as necessary. The zoning designations, land use designations, and development capacity will be also be assessed.

Deliverable(s): One (1) Electronic table of the vacant and underutilized sites in MS Excel. This table will note Assessor’s Parcel Number (APN), address, size of the parcel, address, Zoning Designation, Land Use Designation, description of existing use, availability of utilities, whether the site is publicly owned or leased, number of units that can currently be accommodated, income category anticipated to accommodate, and whether the site was identified in a previous planning period

One (1) Digital shapefile (ArcGIS) showing each vacant and underutilized site

Task 3.6. Compile GIS Shapefiles for Analysis

M-Group will compile various GIS shapefiles for analysis. Shapefiles will include the 5th Cycle Reuse sites, Infrastructure, Zoning, Creeks, Roads, and Fire Hazard areas. These shapefiles will be provided on the City GIS portal. M-Group will keep a local copy of these shapefiles for our internal processes including site selection and land use alternative development.

Deliverable(s): No specific deliverable

Task 3.7. Use of GIS for Site Selection in the context of AFFH

M-Group will use GIS to ensure lower-income housing sites are not concentrated in low-resourced areas (lack of access to high performing schools, proximity to jobs, location disproportionately exposed to pollution or other health impacts) or areas of segregation and concentrations of poverty. We will also assess:

- Proximity to transit.
- Access to high performing schools and jobs.
- Access to amenities, such as parks and services.
- Access to health care facilities and grocery stores.
- Available locational scoring criteria for Low-income Housing Tax Credit (TCAC) Program funding
- Proximity to available infrastructure and utilities.

Deliverable(s): No specific deliverable

Task 3.8. Prepare Land Use Options in GIS

M-Group will provide the three (3) land use options and the preferred land use option in GIS link so that interested persons can see the options. The preferred land use option will also be provided. These shapefiles will be made available for the City GIS portal.

Deliverable(s): Three (3) land use option shapefiles
One (1) chosen land use option shapefile

Task 3.9. Site Inventory and Regional Housing Needs Allocation (RHNA)

M-Group, in conjunction with information provided by 21 Elements, will prepare a site inventory, map, and analysis clearly illustrating the City's capacity to accommodate the new RHNA. The inventory will identify appropriately zoned sites with necessary infrastructure and services. In keeping with state law, we will document each parcel's realistic capacity and prepare a map showing all identified sites. M-Group will compare the inventory of available land to the RHNA and draft the adequate sites analysis to clearly describe how the City will accommodate the needs of households at all income levels. The Housing Element Land Inventory and Identification of Sites shall be prepared through the lens of affirmatively furthering fair housing.

M-Group will, as needed, incorporate RHNA figures and data calculations as provided by the Association of Bay Area Governments (ABAG) and current demographic data. We will provide the Adequate Sites table and analysis for the Housing Element Update, which will include: analysis of housing opportunities, along with an "adequate sites analysis" showing the relationship between the City's RHNA allocation and the City's dwelling unit capacity, availability of potential housing sites based on zoning, infrastructure, and General Plan policies, requirements, and limitations. M-Group will also work with City staff and 21 Elements to identify potential zoning strategies to address need for additional housing unit capacity.

We will work with the City to determine viable sites based on new State Law requirements, requiring additional analysis for sites smaller than one-half acre, larger than 10 acres, and underutilized sites. We will also identify sites included in the past two housing element cycles that per AB 1397 are now required to allow affordable housing by-right in order to continue to count these sites in the inventory. No annexations will be analyzed as part of the site inventory and RHNA allocation.

If sites under one-half acre need to be utilized to meet the RHNA allocation, we can review the potential for micro units allow for an adequate density on a particular site. We will prepare a conceptual design to determine minimum lot widths. We will review parking standards and the potential need for tiny home building code allowances (such as the use of ship ladders and lower ceiling heights) to provide flexibility in the design. In addition, we will use walking score ranking to further determine suitability of individual sites for micro units. Additional options can be reviewed as needed.

In terms of affirmatively furthering fair housing, the identified sites will be assessed for the ability to replace segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity. Site selection will ensure that sites zoned to accommodate housing for lower-income households are not concentrated in lower resource areas and segregated, concentrated areas of poverty, but rather dispersed throughout the community, including in areas with access to greater resources, amenities, and opportunity.

Where sites zoned to accommodate housing for lower-income households are located in lower resource areas and segregated concentrated areas of poverty, incorporating policies and programs in the housing element that are designed to remediate those conditions, including place-based strategies that create opportunity in areas of disinvestment (such as investments in enhanced infrastructure, services, schools, jobs, and other community needs).

Opportunity Sites

- Listing of properties will be identified by:
 - ✓ Address
 - ✓ Assessor Parcel Number
 - ✓ Size of Parcel
 - ✓ General plan land use designation
 - ✓ Zoning designation
 - ✓ For non-vacant sites, a description of the existing use of each parcel
 - ✓ Whether the site is publicly owned or leased
 - ✓ Number of dwelling units that the site can realistically accommodate (including detailing number of units by income category)
 - ✓ Whether the parcel has available or planned and accessible infrastructure
 - ✓ The RHNA income category the parcel is anticipated to accommodate
 - ✓ If the parcel was identified in a previous planning period site inventory
- The site inventory will be prepared using the standards, form, and definitions adopted by HCD.
- If a site included in the inventory is owned by the city, the housing element will include a description of whether there are any plans to sell the property during the planning period and how the jurisdiction will comply with the Surplus Land Act
- Vacant sites zoned for nonresidential use that allow residential development, residentially zoned sites that are capable of being developed at a higher density (non-vacant sites, including underutilized sites), Sites owned or leased by a city, Sites zoned for nonresidential use that can be redeveloped for residential use and a program is included to rezone the site to permit residential use.
- General description of environmental constraints to the development of housing.
- General description of infrastructure (planned/available) including water, sewer and other dry utilities, including availability and access to distribution facilities.
- For non-vacant sites, specify the additional development potential for each site within the planning period and explain the methodology to determine development potential. If Menlo Park relies on non-vacant sites to accommodate 50% or more of its housing need for lower-income households, the “existing use shall be presumed to impede additional residential development, absent findings based on substantial evidence that the use is likely to be discontinued during the planning period.”
- Sites identified for housing development that currently or within the last five years contained residential units occupied by lower-income households, or were subject to an affordability requirement or local rent control policy, must be replaced one-for-one with units affordable to the same or lower income levels.
- Demonstration of zoning to accommodate the housing need for lower-income households.

- Determination of the consistency with affirmatively furthering fair housing (AB 686)
- Map of sites will be included in the inventory.

RHNA Considerations

- Number of units built (i.e., building permits issued).
- Number of units proposed using alternative provisions such as rehabilitation, conversion, preservation or accessory dwelling units (optional).
- Analysis of whether inventory provides for a variety of housing types (Multifamily rental housing, Factory-built housing, Mobile homes, Housing for agricultural employees, Emergency Shelters, Transitional and supportive housing).
- Replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity.
- Determination of Adequate Sites.
- Site suitability for lower-income RHNA based HCD best practices
- No Net Loss will be addressed as part of the analysis.

Junior ADUs/ADUs (in conjunction with 21 Elements)

- Analysis of JADU/ADU to meet RHNA numbers, including a description of zoning available to permit ADU/JADUs, development standards and analysis of potential constraints on the development of ADUs. This analysis will also include a plan that incentivizes and promotes the creation of ADUs that can offer affordable rents for very low, low-, or moderate-income households and potential for state grants and financial incentives connected with the planning, construction and operation of affordable ADUs. (Gov. Code § 65583 and Health and Safety Code § 50504.5.)
- The ADU calculation will include a three-part approach: 1) development trends, 2) anticipated affordability (provided by 21 Elements) and 3) resources and incentives. Development trends will consider ADUs permitted in the prior planning period and may also consider more recent trends. M-Group will utilize a rent survey in assessing the potential for ADU/JADUs and affordability. M-group will also describe resources, incentives, policies, programs to encourage ADU/JADUs. (Common approaches include rent surveys of ADUs, using rent surveys and square footage assumptions and data available through the APR pursuant to Government Code section 65400. Resources and incentives include policies and programs to encourage ADUs, such as prototype plans, fee waivers, expedited procedures and affordability monitoring programs.)
- The housing element will include a description of zoning available to permit ADUs, including development standards and analysis of potential constraints on the development of ADUs. M-Group will include programs as appropriate to address identified constraints. In addition, we will include a plan that incentivizes and promotes the creation of ADUs that can offer affordable rents for very low, low-, or

moderate-income households and requires the California Department of Housing and Community Development to develop a list of state grants and financial incentives in connection with the planning, construction.

Deliverable(s): Site Inventory Analysis will be included in the Administrative Draft Housing Element
 Map of sites will be included in the Administrative Draft Housing Element

Task 3.10. Housing Needs Assessment

M-Group will review the Housing Needs Assessment (including special needs) analysis provided by 21 Elements. M-Group will provide a memo with the noting the results of the review and if applicable noting any informational gaps that may need to be filled, particularly in the realm of affirmatively furthering fair housing (AFFH). Specific AFFH components include:

- An analysis of available federal, state, and local data and knowledge to identify integration and segregation patterns and trends, racially or ethnically concentrated areas of poverty, disparities in access to opportunity, and disproportionate housing needs within the jurisdiction, including displacement risk.
- An assessment of the contributing factors for the fair housing issues
- An identification of the jurisdiction’s fair housing priorities and goals, giving highest priority to those factors identified in clause (iii) that limit or deny fair housing choice or access to opportunity, or negatively impact fair housing or civil rights compliance, and identifying the metrics and milestones for determining what fair housing results will be achieved.
- Strategies and actions to implement those priorities and goals, which may include, but are not limited to, enhancing mobility strategies and encouraging development of new affordable housing in areas of opportunity, as well as place-based strategies to encourage community revitalization, including preservation of existing affordable housing, and protecting existing residents from displacement.
- A summary of fair housing issues in the jurisdiction and an assessment of the jurisdiction’s fair housing enforcement and outreach capacity.
- An assessment of the contributing factors for the fair housing issues: Recommended Housing Element Sections.
- An identification of the jurisdiction’s fair housing priorities and goals, with priority to those factors identified that limit or deny fair housing choice or access to opportunity, or negatively impact fair housing or civil rights compliance. This requirement includes identification of metrics and milestones for determining what fair housing results will be achieved.

Deliverable(s): One (1) electronic memo in MS Word or PDF format reviewing the housing needs assessment

Task 3.11. Potential Governmental and Non-Governmental Constraints

M-Group will review the Governmental and Non-Governmental Constraints provided by 21 Elements as an extension of City staff. M-Group will provide a memo noting any informational gaps that may need to be filled.

Deliverable(s): One (1) electronic memo in MS Word or PDF format reviewing the Governmental and Non-Governmental Constraints

Task 3.12. At-Risk Units

M-Group will provide an inventory and analysis of existing affordable units at risk of converting to market-rate during the planning period. This will include:

- At-risk Units: Inventory of at-risk units (10 years from the housing element due date)
- Estimate of replacement versus preservation costs
- Identification of qualified entities and assess risk of loss
- Identification of potential funding

BAE will provide replacement construction cost estimates of at-risk housing as part of Task 5.24.

Deliverable(s): This analysis will be included in the administrative draft housing element

Task 3.13. Housing Objectives, Policies, and Programs

M-Group will work with City staff (and 21 Elements) to prepare the 2023–2031 Housing Implementation Program. This will involve updating goals, policies, programs, and quantified objectives (pursuant to Government Code Sections 65583 et seq.) to address identified housing needs and constraints based on the effectiveness and continued appropriateness of existing programs, information received through public outreach, the analysis of constraints, and findings from the needs assessment. A statement of the community’s goals, quantified objectives, and policies relative to the maintenance, preservation, improvement, and development of housing will be provided. In addition, M-Group will work with 21 Elements on the Missing Middle Analysis.

Programs will describe specific steps for implementation and will identify a time frame and responsible department. Programs will include, but not be limited to, a schedule of actions during the planning period; quantifiable objectives and programs to address housing needs for all income levels, the elderly, veterans, and populations with disabilities, special needs, or experiencing homelessness; and meaningful actions to affirmatively further fair housing. Objectives, Programs, and Policies will reflect community values and needs. Strategies and actions to implement those priorities and goals identified in the housing needs assessment may include, but are not limited to:

- Enhancing mobility strategies and promoting inclusion for protected classes
- Encouraging development of new affordable housing in high-resource areas
- Place-based strategies to encourage community revitalization, including preservation of existing affordable housing
- Protecting existing residents from displacement

M-Group will address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, fostering and maintaining compliance with civil rights, and must affirmatively further fair housing.

General Housing Issues

- All new state requirements since the adoption of the existing Housing Element
- Consistency and compliance with the rest of the City General Plan elements and community goals
- Development controls and regulatory incentives
- Working to provide housing opportunities for all county residents, including the elderly, veterans, those with disabilities, the homeless, and other special needs groups.
- Fair housing programs
- Facilitating development of adequate housing and infrastructure to meet the needs of low- and moderate-income households in keeping with the regional fair share allocation
- Mitigating any governmental constraints to providing and improving housing
- Programs to rezone and any other programs needed to address a shortfall of sites to accommodate the regional housing need, if applicable, and any programs included pursuant to Section 65583.2(h) and (i) or carryover obligation pursuant to Section 65584.09.
- Quantified Objectives and Housing Programs: Provide statement of quantified objectives; Maximum number of units, by income group, including extremely low-income of: New construction; Rehabilitation; and Conservation.
- Programs to rezone and any other programs needed to address a shortfall of capacity for housing for farmworkers that could not be accommodated on sites identified in the inventory, if applicable.
- If applicable, programs to facilitate a variety of housing types, including multifamily rental, factory-built housing, mobile homes, housing for agricultural employees, supportive housing, single room occupancy, emergency shelters and transitional and supportive housing.
- Program(s) to promote housing opportunities for all persons. M-Group will update financial and programmatic resources available for affordable housing programs and removal of identified constraints, including local and state funding programs, as well as

private sector resources. M-Group will assess current and potential housing programs to recommend future programs that will support the City's housing objectives.

- Program(s) to preserve at-risk units.
- A program that promotes and affirmatively furthers fair housing opportunities and fair choice throughout the community for all persons regardless of race, religion, sex, marital status, ancestry, national origin, color, familial status, or disability, and other characteristics protected by the California Fair Employment and Housing Act (FEHA), Government Code Section 65008, and any other state and federal fair housing and planning law.

Affordable Housing

- Sources of affordable housing funding
- Preserving and improving existing affordable housing
- Transitional/Supportive Housing
- Inclusionary Housing (Menlo Park's Affordable Impact fee and Inclusionary Ordinance)
- Schedule of specific actions
- Timeline for implementation with a beneficial impact in the planning period; and Identification of agencies and officials responsible for implementing each program.
- Programs to assist in the development of housing for extremely low, very low, low and moderate-income households.
- Programs to address governmental constraints and, where appropriate and legally possible, to remove constraints to the maintenance, improvement and development of housing including JADU/ADUs. This will also include an analysis of Menlo Park's JADU/ADU compliance.
- Program(s) to conserve and improve the condition of the existing affordable housing stock.

Other Requirements

In addition to the programs analysis, M-Group will provide the following analysis as required by State Law:

- Description of general plan consistency and zoning consistency.
- Analysis of construction, demolition and conversion of housing for lower-income households.
- Water and Sewer Priority Analysis.
- An assessment of how Menlo Park will comply with the Housing accountability act.
- An inventory and analysis of opportunities to encourage the incorporation of energy-saving features, energy-saving materials, and energy-efficient systems and design for residential development.

Deliverable(s): This analysis will be included in the Administrative Draft Housing Element

Task 3.14. Administrative Draft Housing Element

M-Group will update the Goals, Policies, and Implementing Programs in the current Housing Element along with the housing need, opportunities, and constraints analysis. The Housing Element shall contain programs specific to the unique needs and challenges facing the City of Menlo Park, and shall satisfy the applicable requirement of the State Housing Law.

Deliverable(s): One (1) electronic copy (PDF and MS Word) of the Administrative Draft Housing Element

Task 3.15. Administrative Draft Land Use Element

Based on the RHNA allocation and the results of the public outreach program, a change to the land use map and changes to the land use densities may be required. M-Group will make those changes, as necessary for one (1) land use concept. M-Group will update Land Use Policies as necessary.

Deliverable(s): One (1) electronic copy (PDF and MS Word) of the Administrative Draft Land Use and Circulation Element (Connect Menlo)
One (1) electronic copy (pdf) of the new land use map, as necessary

Task 3.16. Administrative Draft Zoning Ordinance and Zoning Map

M-Group will provide one administrative draft of the changes to the zoning map and zoning text for the chosen land use plan. M-Group will revise the Zoning Text and Map per City staff comments. M-Group staff will attend one Planning Commission Hearing and one City Council Hearing for the adoption of the revised Zoning Code and Zoning Map.

Deliverable(s): One (1) electronic Copy (MS Word) of draft ordinance language and map

Task 3.17. Public Review Draft Housing Element, Safety Element, Environmental Justice Element, Land Use Element, and Municipal Code Update (Joint Housing Commission/Planning Commission)

City staff will provide M-Group with comments on the Administrative Draft within 21 calendar days for preparation of the Public Review Draft. M-Group will provide two (2) rounds of edits based on City staff review of the Public Review Draft Housing Element, Safety Element, Environmental Justice Policies, Land Use and Community Design Element, and Municipal Code Update based on City staff comments.

Deliverable(s): One (1) electronic copy of the Draft Housing Element (PDF and MS Word) provided to City staff and HCD. City staff will provide copies to the City Council, Planning Commission for review and comment

Task 3.18. Final Draft Housing Element, Environmental Justice Element, Safety Element, Land Use Element, and Municipal Code Update

In response to comments from Housing Commission/Planning Commission, and from public review, M-Group will amend the Public Review Draft Documents and provide the Final Documents (Housing Element, Environmental Justice Element, Safety Element, Land Use Element, and Zoning Code/Map changes).

Deliverable(s): One (1) electronic copy of the Final Documents (PDF and MS Word)

Task 3.19. Housing Commission Meeting (Final Adoption Review)

M-Group will attend one (1) Housing Commission meeting for the recommendation of adoption of the Housing Element and General Plan Amendments. M-Group staff members will be available for each meeting. M-Group will prepare a presentation for the meeting. M-Group will make minor changes to the documents as necessary for this meeting. It is assumed the City staff will prepare staff reports, prepare and distribute notices, and schedule the meeting.

Deliverable(s): One (1) Housing Commission meeting attendance by M-Group staff members
PowerPoint

Task 3.20. Planning Commission Meeting (Final Adoption Recommendation)

M-Group will attend one (1) Planning Commission meetings for the recommendation of adoption of the Housing Element and General Plan Amendments. M-Group staff members will be available for each meeting. M-Group will prepare a presentation for the meeting. M-Group will make minor changes to the documents as necessary for this meeting. It is assumed the City staff will prepare staff reports, prepare and distribute notices, and schedule the meeting.

Deliverable(s): One (1) Planning Commission meetings attended by M-Group staff members
PowerPoint

Task 3.21. City Council Meetings (Final Adoption)

M-Group will attend two (2) City Council meetings for the adoption of the Housing Element, General Plan Elements, and Zoning Changes. M-Group staff members will be available for each meeting. M-Group will make minor changes to the documents as necessary for this meeting. M-Group will prepare a presentation for each meeting. It is assumed the City staff will prepare staff reports, prepare and distribute notices, and schedule the meetings.

Deliverable(s): Two (2) City Council meetings attendance by three (3) M-Group staff members
PowerPoint

Task 3.22. HCD Certification

M-Group shall follow through with assisting the City (in coordination with 21 Elements) in obtaining HCD certification of the Housing Element following its adoption by the City. M-Group will work closely with the City and HCD to ensure the City meets State requirements and will recommend any modifications to the Housing Element, if required, to obtain certification.

Deliverable(s): One (1) Cover letter summarizing changes and final Housing Element for certification

Task 3.23. Objective Design Standards (Optional)

M-Group will prepare Objective Design Standards as needed for sites that are designated for by-right development. These Objective Design Standards could also potentially be weaved into an update for the Menlo Park El Camino Real/Downtown Specific Plan. Updating the Menlo Park El Camino Real/Downtown Specific Plan would require additional budget.

Subtask 3.23.1 Document Review

M-Group will review the General Plan and Zoning Regulations, as well as any other documents identified by City staff. This task will also include field visits and a physical survey of existing housing developments, following all relevant San Mateo County Covid-19 related safety requirements, as well as a review of recent developments in Menlo Park and neighboring communities. Based on a review of these documents and a survey debriefing, M-Group will develop a list of existing design guidance for which objective standards need to be developed. Where necessary, M-Group will develop potential solutions, illustrated by graphic representation and/or recommended development metrics.

Subtask 3.23.2 Staff Meetings

After the land use alternative is chosen, M-Group will work with City staff during a series of up to three (3) meetings to review and discuss how objective development standards would be developed.

Subtask 3.23.3 Stakeholder Meetings

M-Group will hold up to five (5) outreach stakeholder meetings on the objective design standards.

Subtask 3.23.4 Public Review Draft of Objective Design Standards

After receiving comments from City staff, M-Group will provide a public review draft of the Objective Design Standards for review at a joint Housing Commission/Planning Commission meeting.

Subtask 3.23.5 Final Draft of Objective Design Standards

Based on comments and direction from this meeting, M-Group will provide revisions for adoption of Objective Design Standards for City Council Review. M-Group anticipates that the Objective Design Standards will move forward after the adoption of the Housing Element.

Deliverable(s):

- Three (3) meetings with City staff
- Five (5) stakeholder meetings
- Attendance at One (1) joint Housing Commission/Planning Commission Meeting
- Draft Objective Design Standards
- Final Objective Design Standards

TASK 4 | ENVIRONMENTAL JUSTICE AND SAFETY ELEMENTS

M-Group will prepare an Administrative Draft Housing Element (2023-2031) with an implementation program that includes, but not limited to, a schedule of actions during the planning period; quantifiable objectives and programs to address housing needs for all income levels, the elderly, veterans, and populations with disabilities, special needs, or experiencing homelessness; and meaningful actions to affirmatively further fair housing. In addition, M-Group will update the Safety Element, create an Environmental Justice Element, and update the Land Use Element. These updates will follow the timeline of the housing element update. Staff will provide the existing documents in electronic format so amendments and new sections will match the format of the General Plan.

Task 4.1. Administrative Draft Environmental Justice Element (SB 1000)

As of January 1, 2018, cities and counties are required to either adopt an Environmental Justice Element in their General Plan or integrate environmental justice policies and goals into the elements of the General Plan “upon the adoption or next revision of two or more elements concurrently” (Government Code Section 65302[h][2]). With the update to the Safety Element and Housing Element, an Environmental Justice Element or environmental justice policies integrated into the General Plan is required. The City has elected to prepare a stand-alone element. The environmental justice element will be reviewed with the General Plan for internal consistency.

There are disadvantaged communities adjacent to Menlo Park. In addition, we are aware of investment and disinvestment study around the Facebook campus, in particular in the Belle Haven neighborhood.

Subtask 4.1.1. Existing Conditions Memo

As part of this document review task, we will use available online resources to research the underlying issues of pollution exposure, chronic health problems, and other factors leading to the identification of local disadvantaged communities.

As part of preparing the Environmental Justice Element, M-Group will conduct a comprehensive analysis regarding environmental pollution exposure. Using CalEnviroScreen 3.0 and other available resources. We will research the social, economic, and pollution data sets. We will review other environmental and health databases and resources to identify indicators measuring city-wide inclusivity and equity, as well as underlying socio-economic variables including home purchasing power, unemployment rate, educational attainment, and poverty levels.

This memo will also note Environmental Justice element requirements. The background information will be consolidated into a memorandum with a text summary and map information. The memorandum will be submitted electronically to the City for staff review. The City will be responsible for collecting all staff comments into a single document using Microsoft Word's track changes function. This scope and budget assume two rounds of comments and revisions with City staff. M-Group will incorporate these comments into the Environmental Justice Element.

Subtask 4.1.2. Environmental Justice Element

M-Group will prepare an Environmental Justice Element. We anticipate that policy will focus on strategies to reduce pollution exposure and environmental burdens affecting low-income and minority populations, together with improving air quality and minimizing impacts on sensitive population groups. We will also look at collaborative policies (e.g., coordination and funding agreements with other public agencies) to encourage greater access to education and job skills training at all age levels. Goals and policies will address the full range of environmental justice issues of relevance to Menlo Park, cross referencing as appropriate environmental justice concerns that may already be addressed in other General Plan elements. We anticipate Environmental Justice Element topics will encompass:

- Pollution exposure
- Food access
- Access to public parks and other community facilities
- Physical activity and residents' health
- Public transit access
- Reduced impacts of climate change
- Education
- Adequate housing (to parallel policies in the updated Housing Element being prepared during the same time period)
- Civic engagement in decision making

As part of our outreach strategy, M-Group will include the following for Environmental Justice:

- Hold a synchronous community meeting/open house (virtual or in person) focused on EJ issues if in person- encourage local folks to attend, but make it open to the community at large and publicize it well (with Spanish Translation)
- Create an online, asynchronous open house that mirrors the “live” community event (with Spanish Translation)
- Information about how to engage in the GP process and the EJ element will be in the flyer Task 2.7 (with Spanish translation)
- The survey will include questions for specific neighborhoods, that covers EJ questions focused on direct experience and challenges/vision for the future for these specific neighborhoods. (with Spanish translation)
- Include a QR code to the survey in the mailer
- Post posters around the neighborhoods with the QR code and information about the planning process trying to get folks to participate ((with Spanish translation)
- Offer a gift card drawing (i.e. 5-10 \$25 gift cards) to encourage people to participate
- The farmers’ market pop-up will have Environmental Justice related material.

M-Group will prepare an administrative draft Environmental Justice Element, submitted electronically to the City for staff review. The City will be responsible for collecting all City staff comments into a single document using Microsoft Word’s track changes function, from which M-Group will revise the administrative draft.

Deliverable(s): One (1) electronic copy (PDF and MS Word) Existing Conditions / Environmental Justice Element requirements Memo (electronic)
One (1) electronic copy (PDF and MS Word) Administrative Draft Environmental Justice Element

Task 4.2. Administrative Draft Safety Element (SB 379)

M-Group will update the City’s Safety Element to bring it into compliance with recent changes in California General Plan law and to be consistent with SB 379. The safety element will be reviewed with the General Plan for internal consistency. In addition to the safety element, M-Group will provide a memo of safety element requirements.

Residential Development Evacuation Routes

SB 99 now requires jurisdictions to review the Safety Element upon the next update of the Housing Element on or after January 1, 2020 and update as necessary to identify residential developments in any hazard area identified in the safety element that do not have at least two emergency evacuation routes. M-Group will work with City staff and local emergency service providers to identify any such developments and create a map of residential developments that do not have at least two evacuation routes. This map will be included in the Safety Element, along with policies and actions to direct future efforts and funding to provide the necessary evacuation routes for the identified communities.

Climate Adaptation and Resiliency

As required by SB 379, M-Group will address climate adaptation in the Safety Element. M-Group will create a short, easily digestible “state of the science” about historic and future climate hazards, such as flooding and drought, extreme heat events, and wildfires in Menlo Park. Using this climate-related hazard data, M-Group will first prepare a vulnerability assessment describing the potential impacts of climate change on vulnerable physical assets and populations.

The vulnerability analysis will seek to uncover a broad range of direct and indirect climate impacts across key sectors, including infrastructure, buildings, natural systems, economic assets, and populations. The analysis will identify key sectors and their assets exposed to climate hazards, assess the sensitivity and adaptive capacity of each sector, and evaluate the vulnerability of each consistent with the California Adaptation Planning Guide and in alignment with SB 379.

The vulnerability assessment will combine qualitative and quantitative analysis. M-Group will map Menlo Park’s critical infrastructure (e.g., roads and highways, railways, water systems), sensitive population groups and disadvantaged communities (none in Menlo Park), parks and open space areas, and other key assets to better understand exposure to each climate hazard. This spatial/quantitative analysis will be combined with an assessment of existing plans and efforts underway to minimize the impacts of climate change to ascertain vulnerability. Where possible, the relative vulnerability will be mapped for each asset category, using maps in combination with text and tables that provide insight into the vulnerabilities.

The vulnerability assessment will help Menlo Park develop a strong basis for understanding the implications for adaptation planning and will help identify goals, objectives, and actions to include in the General Plan’s Safety Element, among others.

Adaptation and Resilience Strategy

M-Group will develop a set of policies and actions guided by the Vulnerability Assessment that will improve resiliency and reduce or eliminate risks from natural hazards in Menlo Park. M-Group will work closely with City staff to ensure resilience policies and strategies are effective and implementable.

The Adaptation and Resilience Strategy will include suggested projects, programs, and funding sources for natural hazard mitigation and response. The strategy will be developed in coordination with City staff, including the Public Works and Community Development Department, local emergency response providers, State Board of Forestry and Fire Protection, and elected officials.

The Administrative Draft Safety Element will be provided to the California Geological Survey of the Department of Conservation and the State Board of Forestry and Fire Protection for review and comment.

- Deliverable(s):**
- One (1) electronic memo noting safety element requirements
 - One (1) electronic copy (MS Word) of the Administrative Draft Safety Element
 - One (1) complete PDF copy of the Administrative Draft Safety Element

TASK 5 | ENVIRONMENTAL, VMT AND FISCAL REVIEWS

This Task includes the work of our subconsultants; ESA, Hexagon, and BAE.

ESA's proposed scope of work for the environmental review component of the Housing Element Update (HEU), which expands on the scope of work outlined in the RFP. In addition, this section summarizes the general approach to the EIR, as well as the interrelatedness of the various HEU components. The EIR will also need to make note of a number of streamlined processes that have derived from changes to state law since the last cycle.

The City is fortunate in that it has a recently certified EIR for its 2016 General Plan. The General Plan EIR and its supporting studies will form the basis for much of the HEU EIR's environmental setting, so it therefore seems reasonable to present the HEU EIR as a Subsequent EIR to the 2016 General Plan EIR. Where necessary, the information in the General Plan EIR would need to be updated to consider changed conditions and revised regulatory requirements.

Task 5.1. ESA: Project Initiation and Data Collection

We recognize that a number of scenarios are likely to be developed as part of the HEU process. The development of those scenarios will be undertaken as part of the various tasks outlined elsewhere in this proposal. For purposes of the EIR, we assume that the EIR process will not formally commence until those scenarios have been defined and vetted with City decision-makers and the Menlo Park community. We would assume that the following component of the HEU to be essentially settled prior to commencement of work on the project description and the EIR in general:

- Identification of housing opportunity sites;
- Identification of distribution scenarios (alternatives) for additional housing; and
- Identification of amendments to the General Plan's Housing Element, as well as amendments to other elements within the General Plan (Safety, Land Use, new Environmental Justice Element).

To begin the process, ESA will attend the project kickoff meeting with City staff and the rest of the project team. It is expected that all meetings would occur via teleconference. With respect to the EIR, subjects for discussion at the meeting will include, but not be limited to:

- Identify any prior environmental documentation that may be relevant to the HEU, most notably the 2016 General Plan EIR;
- Identify project databases, sources of information, and key contacts;
- Establish and confirm the scope of work, level of analysis, structure of the EIR, budget, schedule, and communication protocols; and
- Identify key issues known to be of concern to agencies, interest groups, and the public.

We assume that the City will provide any site-specific studies prepared to date, exhibits, project description details, and materials for development of the environmental document

at the kick-off meeting. If additional data is required, ESA will submit a memo detailing data needs to the City with recommendations on how best to fill them.

Deliverable(s): Attendance at One (1) kick-off meeting
One (1) electronic memo (MS Word) detailing data needs

Task 5.2. ESA: Prepare Project Description and Alternatives

At the conclusion of the scenario vetting process, and in concert with City staff and the project team, ESA will prepare a draft project description technical memorandum for City review, which will include: relevant maps; a description of the regional and local setting; the housing element history; project objectives; planning context; population and housing characteristics and trends; opportunity sites; General Plan and/or zoning text/map revisions; potential alternative scenarios; and other information important to provide an understanding the proposed project. The project description will be used as the basis for preparing the Draft Program EIR. Upon receipt of the City’s consolidated comments, ESA will make necessary changes to the project description and submit it for the City’s final review and approval. ESA assumes that two iterations of the project description will be required and that required technical analyses will begin immediately after receipt of the City’s comments on the draft.

Deliverable(s): One (1) electronic copy of the technical memorandum outlining planning and growth assumptions, detailed project description, and alternatives to be analyzed in the Program EIR

Task 5.3. ESA: Prepare Notice of Preparation

ESA will prepare a Notice of Preparation (NOP) that will build from the project description developed as part of Task 5.2 to describe the proposed HEU and the scope of the Program EIR. The NOP will be supported by maps and figures, as appropriate. The NOP will include:

- A description of the HEU and the environmental setting;
- Applicable maps and figures;
- An overview of the topics that will be evaluated in the EIR; and
- An overview of the environmental review and approval processes, including announcement of a public scoping meeting.

ESA will submit an electronic version of the NOP for City review. Upon receipt of the City’s consolidated comments, ESA will make necessary changes to the NOP and submit for the City’s final review and approval. We assume that the City will be responsibility for circulation of the NOP to area stakeholders, though ESA can submit the NOP to the State Clearinghouse through our Sacramento office.

Deliverable(s): One (1) electronic copy of the Administrative Draft NOP package
One (1) electronic copy of the NOP package for 30-day public review; and Submittal of NOP package to the State Clearinghouse, if requested by the City

Task 5.4. ESA: Conduct Scoping Meeting

ESA will attend an NOP scoping meeting held before the Planning Commission. ESA staff will assist in the preparation of a presentation that will provide an overview of the HEU and the CEQA process. Upon completion of the NOP comment period, we will prepare and submit a scoping report that summarizes the comments and identifies substantive issues warranting additional evaluation in the EIR.

Deliverable(s): Assistance with preparation of meeting presentation
One (1) electronic copy of a scoping report that summarizes comments and responses

Task 5.5. ESA: Conduct Agency Consultation

ESA will informally consult with agencies that provided substantive comments on the NOP. Much of this work would already occur as part of the EIR's preparation, but this task will provide the opportunity to receive more detailed guidance from relevant agencies. Of particular interest will be likely input received from neighboring jurisdictions, utility and service providers, Caltrans, and transit providers.

Deliverable(s): One (1) electronic copy of summarized meeting notes from each meeting/call

Task 5.6. ESA: Prepare Administrative Draft Program EIR

ESA will prepare an Administrative Draft Program EIR in compliance with local requirements, CEQA requirements (Public Resources Code 21000 et. seq), and the State CEQA Guidelines (California Code of Regulations, Section 15000 et. seq).

The scope of the environmental impact analyses in the Draft EIR will utilize the standard list of environmental topics and checklist questions contained within Appendix G of the CEQA Guidelines. Thresholds of significance will be discussed and confirmed with the City prior to the commencement of work. Topics

Aesthetics

ESA will discuss the visual character of the City and the potential visual and aesthetics impacts to surrounding land uses as a result of implementation of the HEU.

Agricultural and Forestry Resources

There are currently no agricultural or forestry resources in the City. Thus, we anticipate that there would be no impact.

Air Quality

ESA will assess the criteria air pollutant emissions likely to derive from implementation of the HEU. The section will include a description of the existing air quality setting for the area. We will present relevant regulatory background information, addressing the federal Clean

Air Act, the California Clean Air Act, and BAAQMD regulations, and policies that could affect the HEU or the air quality analysis presented in the EIR. The air quality assessment will meet the CEQA requirements of the Bay Area Air Quality Management District (BAAQMD) and will be evaluated for consistency with the Bay Area Clean Air Plan: Spare the Air, Cool the Climate (2017 Clean Air Plan).

To the extent required and practicable in a program-level analysis, we will estimate criteria air pollutant emissions from mobile, stationary, and area sources. Emissions will be compared to BAAQMD thresholds for criteria air pollutants. ESA will evaluate local carbon monoxide emissions first based on BAAQMD traffic volume screening criteria and, if necessary, based on modeling to compare to the 1- and 8-hour California standards of 20 ppm and 9 ppm, respectively. We will also evaluate potential odor emissions qualitatively by considering the screening level distances and typical odor sources. However, in general, the uses proposed as part of the HEU are not anticipated to generate substantial odors. If potentially significant impacts are identified related to criteria pollutants or odors, we will develop programmatic mitigation measures to address and reduce the significant impacts.

Pursuant to the recent Friant Ranch decision, the EIR will qualitatively discuss health consequences of ozone precursor emissions that would be associated with the proposed HEU. The explanation will discuss the level of detail needed to provide a meaningful analysis, and contrast that to the programmatic nature of the EIR and the available information and assumptions being used in the analysis.

Because of the location and potential future land uses for the HEU, in terms of residences and other sensitive receptors, a project-level and cumulative assessment of health risks associated with emissions of toxic air contaminants (TAC) will be completed to compare the risks resulting from the project to BAAQMD thresholds, as described below.

Health Risk Assessment

ESA will conduct a refined health risk assessment (HRA) to determine health risks and hazards resulting from TAC emissions from construction and operation of (stationary and mobile sources) of new development under the HEU at full buildout. We will estimate health risks from Diesel Particulate Matter (DPM), and annual average exhaust and dust particulate matter (PM_{2.5}) concentrations at off-site sensitive receptor locations within 1,000 feet of potential HEU opportunity site boundaries. TAC sources are anticipated to include off-road construction equipment, on-road diesel haul trucks, operational vehicle traffic, and operational heavy-duty diesel truck traffic. The HRA will be conducted following methods in BAAQMD's Health Risk Screening Analysis Guidelines and in the Office of Environmental Health Hazard Assessment (OEHHA) Air Toxics Hot Spots Program Guidance. The AERMOD model requires numerous inputs, such as general meteorological data, source parameters, topographical data, and receptor characteristics. Where project-specific information is not available, ESA will use default parameter sets that are designed to produce conservative (i.e., overestimates of) air concentrations. If necessary, ESA will identify mitigation measures to reduce off-site and on-site health risks.

Cumulative Health Risk Assessment

ESA will also prepare a cumulative HRA for the project. For the cumulative HRA, ESA will conduct a survey of the land uses and other TAC emission sources surrounding the potential

development areas to determine the potential nearby sources of PM2.5 and TACs, such as Highway 24 and other major roadways, and any reasonable and foreseeable future developments in the area. ESA will use internet sources including Google Earth, Google Maps, and data from the BAAQMD to survey major sources of PM2.5 and TACs within 1,000 feet of the potential development sites. ESA will rely primarily on the BAAQMD screening tools for permitted stationary sources and highways within the project area to identify nearby sources of TACs and their associated health risks.

Consistent with the BAAQMD Guidelines, ESA will calculate the cumulative lifetime excess cancer risks and annual average PM2.5 concentrations from the project (construction and operation). We will also assess the background cumulative sources in the surrounding area that are within a 1,000-foot radius of the potential development areas. Health risks will be calculated at the Maximally Exposed Individual Sensitive Receptor (MEISR) location for existing off-site receptors. The MEISR will be determined in the project-level HRA described above. If necessary, ESA will identify mitigation measures to reduce cumulative health risks at onsite and offsite receptors.

Biological Resources

The City is generally already developed and is surrounded by areas of existing development. As a result, the HEU is expected to have a minimal effect on local biological resources. Areas of sensitivity within the City limits, such as the wetlands of San Francisco Bay, are assumed to be unavailable for development, and are thus unlikely to be impacted by implementation of the HEU. Key issues that are anticipated, which are common to many urban build projects, include potential effects to nesting birds during construction, the potential effects to wetlands and other waters of the U.S. for parcels near drainages, and consistency with the City's Heritage Tree Ordinance. As part of the analysis in the Program EIR, we will:

- Verify existing biological studies relating to the project area and determine the applicability of the biological analysis in other planning and site-specific CEQA documents for the region.
- Consult with the California Department of Fish and Wildlife California Natural Diversity Database, as well as California Native Plant Society publications.
- Obtain additional information on special-status species, natural communities of concern, and permit requirements through the U.S. Fish and Wildlife Service "Information for Planning and Consultation" (IPaC) online system.
- Summarize and evaluate federal, state, and local policies and regulations as they pertain to biological resources in the area.
- Identify any potentially significant impacts to biological resources, and recommend measures that would reduce impacts to less-than-significant.

Cultural Resources

Portions of the City are located in an area known for a high sensitivity for prehistoric archaeological resources; numerous burials and occupation sites have been identified in Menlo Park. The City also contains numerous local historic built-environment resources, some of which have been listed on national and state registers. Therefore, consistent with General Plan Goal OSC-3: Protect and Enhance Historic Resources, and Policy LU-7.8: Cultural

Resource Preservation, the Program EIR will characterize potential impacts to archeological resources, historic architectural resources, human remains, and tribal resources.

ESA will provide measures to avoid, minimize, or mitigate potential impacts to these types of resources. Mitigation measures could include project planning requirements to avoid areas of high archaeological sensitivity; requirements for subsurface investigations in known sensitive areas to identify resources prior to project construction; monitoring during construction; and data recovery efforts through scientific research and/or consultation with Native American tribes. For historic resources, in addition to compliance with the Secretary of the Interior's Standards, mitigations may include additional resource surveys and evaluations, documentation and interpretation plans, and building relocation. As part of the Program EIR's preparation, ESA will:

- Review City documents and conduct a records search at the Northwest Information Center of the California Historical Resources Information System to identify known cultural resources in the planning area;
- Identify areas of archaeological and historic sensitivity utilizing existing planning documents, geologic maps, soil studies, historic maps, and previous archaeological and historic studies;
- For historic architectural resources, the effort above will be augmented with a reconnaissance-level survey to assess the architectural character of the area and relative potential for additional historic resources; no formal survey ("DPR" forms) will be prepared.
- Contact the Native American Heritage Commission to request information on any known sacred sites within the vicinity of the planning area and to request a list of contacts for Native American tribes who may have an interest in the planning area. In compliance with Assembly Bill 52 and Senate Bill 18, on behalf of the City, ESA can prepare a certified letter to each of the NAHC-listed contacts, requesting information/comments regarding any Native American cultural resources that may be of concern.
- Identify any potentially significant impacts to cultural resources, and recommend measures that would reduce impacts to less-than-significant.

Energy

ESA will consider the increase in energy resources associated with the implementation of the HEU. This analysis will consider the potential for any significant direct, indirect, and cumulative energy impacts, and associated mitigation measures. The section will be closely coordinated with the project description and GHG analysis to ensure the project and associated environmental effects are consistently characterized.

Geology, Paleontology, and Mineral Resources

The key geology issues of concern in the region are the presence of nearby active and potentially active faults. The San Andreas Fault, located just west of the City, has had destructive earthquakes in historic time, as have other nearby regional faults. In addition, areas of high liquefaction potential are present in areas of the City near San Francisco Bay and San Francisquito Creek. As part of the Program EIR's preparation, ESA will:

- Review reports, maps, and data published by the USGS, CGS, Natural Resources Conservation Service, and other sources to identify and summarize geologic, seismic, and soil conditions, and paleontological resources within the program area and develop a comprehensive understanding of the potential risks from seismic events, unstable soils, and other CEQA Appendix G criteria.
- Identify the relevant regulations and codes that would apply to construction and operation of projects within the program, and determine the manner and extent to which compliance would address potential impacts.
- Describe methods to manage stormwater to prevent erosion; and determine if, where, and to what extent geologic hazards to structures would remain after compliance with building codes and geotechnical recommendations.
- Identify which, if any, impacts are significant, and present mitigation, where applicable and feasible, to reduce the impacts to below applicable significance thresholds.

Greenhouse Gas Emissions

The Greenhouse Gas Emissions (GHG) section will include the current setting, regulatory background, impact analyses, consistency with applicable GHG significance thresholds and guidance, and mitigation. Short-term emissions due to construction and long-term operational emissions will be evaluated using CalEEMod and other tools. The information contained in the project transportation and traffic analysis will be used to estimate transportation-related GHG emissions. The evaluation will also consider other aspects of construction and operation of likely new housing, including energy consumption, water consumption, and solid waste generation, that would contribute to emissions.

The project's GHG emissions will be compared to applicable GHG significance thresholds and BAAQMD CEQA guidance for assessing emissions from land development and stationary sources. Additionally, the project will be assessed for consistency with the state's 2017 Climate Change Scoping Plan Update for achieving the statewide GHG target mandated by SB 32, the San Francisco Bay Area's Sustainable Communities Strategy/Regional Transportation Plan (Plan Bay Area 2040), the San Mateo County Climate Action Plan, and the City's Climate Action Plan. If applicable, ESA will identify measures to mitigate any adverse impacts.

Hazards and Hazardous Materials

The primary hazards and hazardous materials issues would be previous uses of the properties where development could occur under the HEU, as well as nearby properties, and whether any residual contamination may be present that would affect the construction or operation of projects within the program. Numerous sites within the City have undergone cleanup treatments, several are currently undergoing treatment, and several others have had restrictions placed on them which may limit the types of future development that can occur. These types of occurrences are not unusual in an urban area, but they can interfere with future development opportunities. Portions of the City's southern perimeter are also adjacent to fire hazard severity zones.

ESA will discuss the potential for amendments of the City's Safety Element pursuant to Government Code Section 65302.15(b) with City staff and will address the potential hazards and hazardous materials-related impacts of the proposed HEU and any concurrent general plan amendments in accordance with CEQA requirements. As part of this effort, ESA will:

- Describe the setting of environmental conditions using available information, with a focus on the housing opportunity sites.
- Identify the relevant regulations and codes that would apply to construction and operation of the program, and determine the manner and extent to which compliance would address potential impacts.
- Identify which, if any, impacts are significant, and present mitigation, where applicable and feasible, to reduce the impacts to below applicable thresholds.

Hydrology and Water Quality

The key hydrology and water quality issues of concern for the HEU would be water quality impacts during construction, and the presence of 100- and 500-year FEMA flood hazard zones within the City. As part of this effort, ESA will:

- Review reports, maps, and data published by the state, county, FEMA, and other sources to identify and summarize hydrologic and water quality conditions in the program area, with a focus on the housing opportunity sites.
- Identify the relevant regulations and codes that would apply to construction and operation of projects within the program, and determine the manner and extent to which compliance would address potential impacts. This will include discussing how the state Construction General Permit, local MS4 permit, and low impact development (LID) requirements would address erosion and runoff issues. The degree to which such requirements will reduce potential effects and any additional actions that might be required will receive careful consideration.
- Describe program methods to manage stormwater, and determine if, where, and to what extent impacts would remain after compliance with standard codes and geotechnical recommendations.
- Identify which, if any, impacts are significant, and present mitigation, where applicable and feasible, to reduce the impacts to below applicable thresholds.

Land Use and Planning

The analysis of land use impacts will evaluate the HEU's consistency with existing land use plans and zoning. This section will discuss the existing land use and planning setting and the potential for environmental impacts associated with the HEU and identify mitigation measures, where appropriate. It will also discuss the General Plan Amendment associated with implementation of the HEU and identify any potential environmental issues.

Noise and Vibration

The analysis will focus on noise and vibration levels generated by construction activities as well as from increases in traffic volumes due to potential build-out under the HEU. Noise and vibration levels will be determined relative to the City's applicable noise level criteria in Chapter 8.06 of the City's Municipal Code and General Plan Noise Element.

ESA will prepare a noise analysis that will describe the noise impacts resulting from construction and on-site noise levels associated with existing and future traffic on local roadways, as well as noise from Caltrain operations. ESA will compile an inventory of existing long-term noise data from the 2016 General Plan EIR and other recent CEQA documents for developments

within the City to the extent possible. Traffic noise on local streets generated by vehicles will be quantitatively assessed using algorithms of the federal Transportation Noise Model. The noise analysis will identify nearby sensitive receptors—primarily residences—and assess impacts on these receptors. The analysis will also provide estimations of potential exposure to noise and vibration levels at various distances from construction and transportation sources; any findings of impact; and the need for any mitigation measures, if necessary.

Population and Housing

The HEU will include programs to increase housing within the City and, as a result, it is anticipated that population would increase. ESA will evaluate the potential for the HEU to directly or indirectly induce population, housing, and employment growth within the City. The evaluation will rely on information within the General Plan, other City sources, Census data, and projections provided by ABAG, and will evaluate the HEU's effects, particularly those that would translate to significant physical impacts on the environment.

Public Services and Recreation

The HEU would include programs that could increase population growth and demand for public services, including fire protection, police protection, schools, parks, and other public facilities such as libraries. ESA will evaluate whether the expansion of these services under the HEU would result in any direct or indirect physical changes to the environment.

Transportation and Circulation

Using the vehicle miles traveled (VMT) and transportation impact analysis prepared by Hexagon Transportation Consultants, ESA will prepare the Transportation/Traffic section of the EIR. The analysis of transportation impacts will be conducted consistent with the City's adopted VMT methodology and thresholds. As an optional task, Hexagon can provide an intersection LOS analysis in a stand-alone report, separate from the environmental impact analysis, that could be used to evaluate conformance with the City's performance policies.

The analysis of Transportation/Traffic Impacts will include the following analysis topics:

- Impacts attributable to vehicle miles traveled (VMT) generated by the project, consistent with the City's adopted VMT methodology and thresholds. Hexagon will conduct the VMT analysis based on the ConnectMenlo Travel Demand Model.
- Impacts to bicycling, walking and transit.
- Comparison of transportation impacts for up to three scenarios.

Where potentially significant transportation impacts are identified, the Transportation/Traffic section will identify feasible mitigations which could include transportation demand management (TDM) measures to reduce VMT.

Tribal Cultural Resources

As stated previously under Cultural Resources, ESA will assist the City in preparing AB 52 letters. ESA assumes that the City will conduct consultation with tribal representatives who have requested notification of projects within the City. Effects of the HEU on identified resources will be evaluated.

Utilities and Service Systems

The HEU would include proposed programs that could increase population growth and demand for utilities and services systems, including water, wastewater, stormwater drainage, electric power, natural gas, telecommunication systems, and solid waste. ESA will evaluate whether any direct or indirect physical changes to the environment would result as to utilities and service systems. No Water Supply Assessment (WSA) will be prepared, however ESA will consult with several service providers regarding water and wastewater services to the City.

Wildfire

According to the City 2016 General Plan EIR, portions of the City’s southern perimeter are also to moderate and high fire hazard severity zones in a State Responsibility Area. ESA will evaluate whether the implementation of the HEU would result in any direct or indirect physical changes to the environment. (Also see Hazards and Hazardous Materials section above.)

Alternatives

In addition to the No Project Alternative, the EIR will evaluate up to three additional alternative development scenarios. The analysis will be qualitative for most issues, but will be quantified for issues where it is reasonable to do so (i.e., air quality, transportation). The selection of alternatives for inclusions in the EIR will occur in coordination with the City, and will be primarily directed towards alternatives that anticipate potential policy options that could lessen identified significant impacts associated with the HEU.

Deliverable(s): One (1) electronic copy of the Administrative Draft EIR

Task 5.7. ESA: Prepare Public Draft Program EIR

ESA will revise the Administrative Draft Program EIR to reflect the City’s recommended changes, and will prepare a Final Screencheck EIR for final review by the City prior to public circulation. After any minor changes, this version of the document will constitute the Public Draft Program EIR and will be distributed for a 45-day public review period.

ESA will prepare the Notice of Completion (NOC) and Notice of Availability (NOA), and will assist the City in distributing the Draft Program EIR to the public. Per the requirements of the RFP, ESA staff will participate in a public hearing during the Draft EIR’s circulation period.

Deliverable(s): Fifteen (15) hard copies of the Draft Program EIR
One (1) electronic copy of the Draft Program EIR

Task 5.8. ESA: Prepare Responses to Comments

We assume that a moderate number of comments will be received, and that the draft responses will be able to be prepared per the schedule and budget provided. ESA will review the comments and coordinate with the City to discuss issues raised and establish an approach for responding to comments. If the number or complexity of comments cannot be

responded to with the time and budget provided, we will share this information with the City and discuss additional schedule and budget requirements, if needed. ESA will then prepare a draft response to comments document and submit it to the City for review.

Deliverable(s): One (1) electronic copy of the draft response to comments

Task 5.9. ESA: Prepare Final Program EIR, Findings, and Mitigation Monitoring and Reporting Plan

ESA will prepare a Final Program EIR and Mitigation Monitoring and Reporting Plan (MMRP) The Final EIR will consist of:

- Comment letters received during the public review period, with responses.
- Any changes, corrections, or modifications to the Draft Program EIR resulting from the comments received (one round of City review assumed).

The draft MMRP will contain a list of mitigation measures to be adopted as part of project implementation, identify responsible parties for mitigation implementation, as well as those responsible for monitoring and enforcement (one round of City review assumed).

- A summary of findings, as required by CEQA (one round of City review assumed). It is assumed that the City will prepare any accompanying resolutions to the findings and the adoption of the HEU.
- ESA will also prepare a Notice of Determination (NOD), for delivery to the County Clerk and the State Clearinghouse.
- The ESA project director and project manager will attend one public hearing as part of the EIR’s certification process.

Deliverable(s): Five (5) hard copies of the draft Final Program EIR, Findings, and MMRP
 Notice of Determination
 One (1) electronic copy of the draft Final Program EIR, Findings, and MMRP
 Notice of Determination

Task 5.10. ESA: Project Coordination Meetings and Project Management

ESA’s Project Manager will be the task leader for all tasks identified in this scope of work, and will oversee preparation of each component of the environmental analysis, coordinating interaction between the City and ESA staff. ESA’s Project Director and Project Manager will be available to work with the City on the strategy and design of the CEQA process and documents, and will provide internal quality control for the environmental document.

For purposes of budgeting for this task, we have considered the overall project duration (12 months) and have assumed a set number of meetings during that period, together with

a monthly hourly average for project management purposes. We have assumed that all of the project team meetings will occur via video or teleconference. We have assumed that meetings will occur on a monthly basis (12 months), though we recognize that during certain periods more frequent meetings may be required. To that end, we have provided budget for up to 16 meetings with up to 4 hours allotted for each to account for preparation, meeting, and coordination time. We have also provided time to account for occasional attendance by ESA’s project director and technical specialists as the need arises. For purposes of general project management duties, we have allotted 6 hours monthly for this purpose.

Deliverable(s): Attendance at sixteen (16) meetings including a kick-off meeting

Task 5.11. Hexagon: Travel Demand Model

Pursuant to SB 743, Vehicle-Miles Traveled (VMT) replaces intersection LOS as the transportation impact criteria for CEQA purposes. VMT is calculated by the multiplication of the project trip generation and the average trip length. Hexagon proposes to utilize the Connect Menlo Travel Demand Model to conduct the VMT analysis. The model uses socioeconomic inputs and various mathematical models to estimate project trip generation and average trip length.

Deliverable(s): No specific deliverable

Task 5.12. Hexagon: With-Project Land Use and Roadway Network

Hexagon will rely on City staff to provide input on the locations and numbers of households as well as any potential roadway network improvements to be analyzed under the “with-project” scenario. Hexagon will convert this information into model-ready inputs for evaluation.

Deliverable(s): Memo documenting decisions

Task 5.13. Hexagon: Evaluation of 3 Preliminary Alternatives

Hexagon will evaluate 3 preliminary HEU alternatives. Hexagon will set up the model inputs (land use, roadway network) specific for the 3 alternatives based on City staff input. VMT analysis will be run for existing and cumulative scenarios with and without the project, separately for all 3 alternatives. Hexagon will document our findings in a memorandum.

Deliverable(s): One (1) electronic memo outlining analysis of the three preliminary land use alternatives

Task 5.14. Hexagon: VMT Analysis

Existing VMT and Existing plus project VMT will be evaluated. A VMT impact discussion will be provided based on City’s VMT impact criteria. Cumulative no project and Cumulative plus project VMT will also be evaluated. A Cumulative VMT impact discussion will also be provided as necessary.

Deliverable(s): This task will be completed as part of the traffic impact analysis report

Task 5.15. Hexagon: Bicycle, Pedestrian and Transit Facilities

Hexagon will qualitatively evaluate the proposed Housing Element Update’s potential impacts on City’s existing and planned bicycle, pedestrian and transit facilities. Hexagon will also identify any potential conflicts with City’s adopted policies on bicycle, pedestrian and transit facilities. Potential mitigation strategies would be identified in coordination with City staff.

Deliverable(s): This task will be completed as part of the traffic impact analysis report

Task 5.16. Hexagon: Potential Mitigation Strategies

If the analysis identifies potential VMT impacts, Hexagon will coordinate with City staff to determine the appropriate mitigation strategies to eliminate the potential VMT impacts.

Deliverable(s): This task will be completed as part of the traffic impact analysis report

Task 5.17. Hexagon: Meetings

The fee estimate includes Hexagon staff attendance at five staff meetings in connection with the project. Attendance at public hearings is not part of the main scope.

Deliverable(s): Attendance at five (5) meetings with City staff and M-Group

Task 5.18. Hexagon: Traffic Impact Assessment

Hexagon will summarize findings and a write-up of the existing multimodal transportation conditions will also be included. Hexagon Transportation Consultants will respond to editorial comments on the draft and prepare a final TIA report.

Deliverable(s): One (1) electronic draft traffic impact analysis report
One (1) electronic final traffic impact analysis report

Task 5.19. Hexagon: Data Provisions for Other EIR Analysis

Hexagon staff will provide any requested transportation data to other EIR consultants.

Deliverable(s): No specific deliverable

Task 5.20. Hexagon: Response to EIR Comments

Hexagon will respond to transportation-related comments on the Draft EIR.

Deliverable(s): Assistance to response to comments regarding transportation related comments

Task 5.21. BAE: Kick-off Meeting

BAE will attend a kick-off meeting with City staff and the rest of the consultant team to discuss project expectations regarding coordination, reporting, deliverables, community engagement, and relevant information. As a part of this task, BAE will review relevant documents and other background information pertaining to the Housing Element Update and the related fiscal impact analysis.

Deliverable(s): Attendance at one (1) kick-off meeting

Task 5.22. BAE: Public Study Sessions and/or Hearings

BAE will attend up to six public study sessions and hearings (e.g., Housing Commission, Planning Commission, and City Council meetings) related to the Housing Element Update. BAE will present findings, respond to questions, and receive comments related to the fiscal impact analysis and affirmatively furthering fair housing analysis, and will prepare presentation materials as needed.

Deliverable(s): Attendance at six (6) public study sessions/hearings

Task 5.23. BAE: Affirmatively Furthering Fair Housing (AFFH) Data and Analysis

BAE will assist with the preparation of the Housing Element by conducting analysis to address the new requirements under AB 686 to affirmatively furthering fair housing. This will include analysis of available federal, state, and local data and knowledge to identify integration and segregation patterns and trends, racially or ethnically concentrated areas of poverty, disparities in access to opportunity, and disproportionate housing needs within the jurisdiction, including displacement risk. BAE will also request information on fair housing complaints from the HUD Office of Fair Housing and Equal Opportunity and the California Department of Fair Employment and Housing, as well as any information available from local fair housing service providers. BAE will also request information regarding hate crimes from the Federal Bureau of Investigations and the Menlo Park Police Department. BAE will also request information from the City of Menlo Park regarding the availability of fair housing services, education, and outreach, and will review the most recent Assessment of Fair Housing for the City. Based on the findings from this analysis, BAE will provide input on the Housing Element sites inventory and policies and programs to address affirmatively furthering fair housing requirements. This analysis will also inform the Environmental Justice Element of the General Plan.

Deliverable(s): No specific deliverable

Task 5.24. BAE: Cost to Replace At-Risk Units

BAE will estimate the total cost of producing new rental housing to replace any assisted units that are identified as being at risk of conversion from low-income use during the next ten years, as well as the cost to preserve these units. BAE will review applications submitted to the California Tax Credit Allocation Committee (TCAC) to identify new construction and rehabilitation projects in or near Menlo Park that are comparable in size and rent levels to any units that are at risk of conversion. BAE will review the construction cost information provided in the TCAC applications for these projects to identify the typical cost associated with replacing or preserving units similar to those that are at risk of conversion.

Deliverable(s): Provided as part of the administrative draft housing element

Task 5.25. BAE: Fiscal Impact Analysis

BAE will conduct a fiscal impact analysis that will provide a detailed estimate of the net fiscal impacts that each land use strategy will have on the City of Menlo Park as well as key special districts that serve the areas that would be affected by each strategy. This analysis will evaluate the revenue and cost implications of up to three (3) land use strategy alternatives for the City, the Menlo Park Fire Protection District, the school districts that serve Menlo Park, the San Mateo Community College District, the San Mateo County Office of Education, the Midpeninsula Regional Open Space District, and the Sequoia Healthcare District.

BAE will estimate the General Fund revenues that each land use strategy will generate for the City of Menlo Park on an annual basis, including property tax, sales tax, business license fees, utility user tax, franchise fees, and any other applicable revenues. In addition, BAE will estimate one-time revenue from the impact fees that would apply to the development associated with each land use strategy. BAE will also estimate the annual City of Menlo Park General Fund operating expenditures associated with providing City services under each land use strategy, including police, public works, recreation and library services, and general government services. The analysis of operating costs will identify fixed and variable City service costs to determine the portion of City service costs that would need to increase to maintain current service levels as the City's population grows. Fiscal impacts will be presented in current dollars on a net annual and cumulative basis over a 20-year period.

BAE will also estimate the property tax revenue and other revenue sources that each land use strategy will generate for the special districts that serve Menlo Park, as well as General fund operating expenditures for special districts that provide services to the City. This analysis will focus on annual operating revenues and expenditures rather than one-time capital costs. For the school districts, BAE will estimate the cost to serve new elementary, middle, and high school students resulting from each strategy based on each school district's estimated student generation rates. If requested by City staff, BAE will conduct phone interviews or prepare questionnaires to contact representatives from the Menlo Park Fire Protection District and the school districts that serve Menlo Park to assess existing capacity, potential facility and equipment needs, and the potential impact of each land use strategy.

BAE will prepare and submit a Draft Fiscal Impact Analysis report that will include a concise and highly-accessible executive summary. Following receipt of a single set of consolidated

comments on the draft report, BAE will make modifications to the draft report as needed and prepare a draft for public review.

Deliverable(s): One (1) administrative draft electronic Fiscal Impact Analysis Report in MS Word
 One (1) final electronic Fiscal Impact Analysis Report in MS Word

Task 5.26. Hexagon: Additional Public Hearing Attendance (Optional)

As an optional task, Hexagon staff will attend public hearings upon request.

Deliverable(s): Attendance at public hearings upon request

Task 5.27. Hexagon: VMT Training Session (Optional)

As an optional task, Hexagon staff will coordinate with the project team to host a 1-hour VMT training session. This task includes Hexagon staff time to understand the specific needs for this training session, put together the training material, time, and host the event.

Deliverable(s): One (1) 1-hour long VMT training session

Task 5.28. Hexagon: Intersection Analysis (Optional)

As an optional task, Hexagon will provide intersection LOS analysis in a stand-alone report, following City’s intersection analysis guidelines to ensure conformance with City’s performance policies. Since the project description is still pending, the detailed scope and budget associated with the intersection analysis will be determined in consultation with City staff.

Deliverable(s): Based on the project description, a LOS analysis can be provided as an optional task

Task 5.29. BAE: Learning Session on Residential Development Economics (Optional)

BAE will host a one-hour education session on the economics of residential development in Menlo Park. BAE will prepare educational materials that provide an overview of the financial factors that affect market-rate and affordable residential development feasibility, including construction costs, financing sources, required developer returns, and project revenues. BAE will lead a presentation and discussion on these topics to build awareness of the factors that affect residential development feasibility. BAE’s budget for this task assumes that this discussion will use order-of-magnitude estimates of construction costs and will not require detailed development proformas to analyze specific prototypes

Deliverable(s): One (1) 1-hour training session on Residential Development Economics

Task 5.30. BAE: Development Feasibility Analysis of Potential Site Strategies (Optional)

BAE understands that, as part of the City's Housing Element Update process, 21 Elements will work with the City of Menlo Park to identify strategies to respond to any gaps between the City's RHNA and the inventory of existing sites. As an optional task, BAE will conduct a development feasibility analysis to evaluate the effectiveness of the strategies that 21 Elements identifies facilitate residential development and address the site inventory gap. Strategies that could be evaluated include rezoning of sites and changes to development standards.

To conduct the development feasibility analysis, BAE will work with 21 Elements and City staff to identify strategies to be evaluated and to develop residential development prototype projects that each strategy would support. BAE will then prepare static proforma financial models to evaluate up to four prototype projects to determine whether each prototype is financially feasible based on the identified strategies. The proforma models will identify all construction costs, land costs, required developer returns, project revenues, and other factors that affect financial feasibility to determine whether the prototype projects are financially feasible. If any of the prototype projects are found not to be financially feasible, BAE will identify factors that have a negative impact on feasibility and recommend changes to the strategies identified by 21 Elements as appropriate.

Deliverable(s): One (1) electronic copy of a development feasibility analysis

Task 5.31. BAE: Additional Public Hearing Attendance (Optional)

As an optional task, BAE staff will attend public hearings upon request.

Deliverable(s): Attendance at public hearings upon request



SCOPE ASSUMPTIONS

M-GROUP SCOPE OF WORK ASSUMPTIONS

1. City staff will prepare all staff reports.
2. City staff will provide and distribute all notices.
3. This scope of work assumes three concepts will be introduced and one land use concept will be chosen to address the RHNA Allocation. If additional concepts are required, a budget adjustment would be required. In addition, more than one land use concept is to be fully analyzed, a budget amendment will be required.
4. City will be available for coordination with M-Group on a consistent basis.
5. M-Group will coordinate with the City to ensure that all records and past reports relevant to the project area including previous environmental review documents, technical reports, etc., are obtained and referenced.
6. All project materials, technical studies, etc., will be provided promptly and will not undergo substantial modifications once authorization to proceed has been issued.
7. City staff will assemble and provide M-Group with all responses received through the initial noticing and referral process.
8. This scope of work assumes that no additional technical studies would be required.
9. The City will provide all administrative comments in one consolidated document using the track changes function in word.
10. This proposal provides for CEQA lead agency review and determination. No regulatory permits, agreements or approvals are included in this proposal.
11. The scope of the zoning changes assumes minimal edits to the existing zoning code.

12. Only documents provided to the City of Menlo Park would be considered proprietary work products belonging to the City of Menlo Park.

ESA SCOPE OF WORK ASSUMPTIONS

A key assumption of our scope, particularly as it relates to the schedule, is that the conceptual planning component of the proposed HEU will be sufficiently advanced to allow our team to begin work immediately upon project initiation. Other assumptions include the following:

1. No substantial revisions to the project description or alternative scenarios will be made once they are accepted and analysis begins. Substantial changes resulting in rework could affect the project schedule and require an augment to the budget.
2. The number of rounds of review and revision will be limited to those noted in the above scope of work.
3. We have made estimates of the level of effort required to prepare the various iterations of the response to comments and Final EIR based on our professional experience and knowledge of the issues at this time. We have estimated a reasonable level of effort for these tasks. Our estimate does not, however, represent a conservative or “worst case” estimate of effort that could be required if highly complex and sophisticated challenges are presented in comment letters about the Draft EIR. Prior to initiating the above Final EIR-related tasks, we will review the magnitude of comments received, the adequacy of the estimated level of effort, and confirm with the City the need for any augmented services or costs.



BUDGET

The following Project Budget shows the proposed cost to complete the scope of work described in this proposal. We believe this cost proposal is accurate given the scope of work and anticipated level of community outreach and work needed to complete the Housing Element. However, we are open to discussion of changes and refinements in order to meet the City's budget needs.

M-Group proposes a Fixed-Fee contract with monthly invoicing on a percentage task completion basis.



page left blank

MENLO PARK HOUSING ELEMENT BUDGET February 26, 2021		M-GROUP								
Task Number / Description	Geoff Bradley, AICP, Principal-In-Charge/Proj. Manager	Sung Kwon, AICP, Deputy Project Manager	Christina Paul, AICP, Community Engagement Lead	Payal Bhagat, Principal Planner	Justin Shiu, AICP, Senior Planner	Associate Planner	Assistant Planner	M-Group Hours (without optional items)	Subtotal (without optional items)	
Hourly Billing Rate	\$250	\$165	\$165	\$165	\$145	\$125	\$95			
TASK 1 PROJECT ADMINISTRATION										
1.1	Project Kick-off meeting	2	6	2	0	0	0	10	\$1,820	
1.2	Finalize and Update Schedule	4	8	4	0	0	10	26	\$4,230	
1.3	Project Management and Coordination	100	80	20	0	0	32	232	\$45,500	
1.4	Coordination with HCD	12	24	0	0	0	0	36	\$6,960	
Task 1 Subtotal:		118	118	26	0	0	42	304	\$58,510	
TASK 2 COMMUNITY ENGAGEMENT STRATEGY										
2.1	Community Engagement Plan	2	8	42	0	10	0	62	\$10,200	
2.2	Webpage	0	8	0	0	0	20	48	\$5,720	
2.3	Master Contact List	0	4	0	0	0	10	54	\$5,710	
2.4	Partner with Local Non-Profit Community Groups	2	12	4	0	0	18	54	\$7,100	
2.5	Social Media	0	8	8	0	0	32	88	\$10,440	
2.6	Electronic Media	2	8	2	0	0	20	64	\$7,690	
2.7	Print Media/ PDF Utilization	0	8	4	0	0	20	56	\$6,760	
2.8	General Survey	2	8	2	0	16	10	62	\$8,000	
2.9	Housing Introduction Seminar	2	4	16	0	0	20	72	\$9,150	
2.10	Focus Groups	4	8	4	0	24	24	76	\$10,600	
2.11	Individual Interviews	2	4	0	0	0	4	34	\$3,940	
2.12	General Outreach Meetings by Council District	8	20	0	0	0	20	68	\$9,700	
2.13	Project Gallery	2	4	12	0	0	16	34	\$5,140	
2.14	Farmers' Market Pop-Up Booth	4	8	0	0	0	12	36	\$4,960	
2.15	Preliminary Land Use Strategies: Housing Commission	8	20	0	12	0	32	72	\$11,280	
2.16	Housing Workshop	4	8	20	0	12	4	60	\$9,240	
2.17	Land Use Meeting: Planning Commission	8	24	0	0	0	52	84	\$12,460	
2.18	Preliminary Land Use Alternatives: City Council	8	24	0	0	0	40	72	\$10,960	
2.19	Preferred Land Use Concept: Planning Commission	4	16	0	0	0	24	44	\$6,640	
2.20	Draft EJ & Safety Element to Planning Commission	4	8	0	0	0	12	24	\$3,820	
2.21	NOP/Scoping Meeting at Planning Commission	4	4	0	0	0	0	8	\$1,660	
2.22	Draft EIR at Planning Commission	4	4	0	0	0	0	8	\$1,660	
Task 2 Subtotal:		74	220	114	12	62	398	300	\$162,830	
TASK 3 HOUSING ELEMENT AND RELATED WORK										
3.1	Document Review	0	12	0	0	0	8	8	\$3,740	
3.2	List of Current General Plan Policies and Programs	0	2	0	0	0	8	10	\$1,330	
3.3	Review and Evaluation of Current Housing Element	4	12	0	8	0	16	40	\$6,300	
3.4	Review City's RHNA Allocation	2	4	0	0	0	8	14	\$2,160	
3.5	Review City's Vacant and Underutilized Land Inventory	0	8	0	2	20	32	62	\$8,550	
3.6	Compile GIS Shapefiles for Analysis	0	2	0	0	0	24	26	\$3,330	
3.7	Use of GIS for Site Selection & AFFH	0	16	0	0	0	48	64	\$8,640	
3.8	Prepare Land Use Options in GIS	8	32	0	0	0	48	104	\$14,800	
3.9	Site Inventory and RHNA	8	16	0	6	16	44	90	\$13,450	
3.10	Housing Needs Assessment	2	24	0	0	16	42	96	\$13,170	
3.11	Potential Governmental and Non-Governmental Constraints	2	16	0	0	20	24	62	\$9,040	
3.12	At-Risk Units	2	16	0	0	0	16	34	\$5,140	
3.13	Housing Objectives, Policies, and Programs	16	20	0	10	26	48	162	\$22,710	
3.14	Admin. Draft Housing Element	8	20	0	12	20	30	90	\$13,930	
3.15	Admin. Draft Land Use Element	8	16	0	12	20	48	104	\$15,520	
3.16	Admin. Zoning Ordinance and Zoning Map	8	24	0	16	24	40	112	\$17,080	
3.17	Public Review Draft Housing, Safety, Environmental Justice, Land Use Elements + Zoning Code and Map	8	24	0	0	0	40	72	\$10,960	
3.18	Final Draft Housing, Safety, Environmental Justice, Land Use Elements + Zoning Code and Map	2	8	0	0	0	32	58	\$7,340	
3.19	Housing Commission Adoption Meeting	8	8	0	0	0	4	24	\$4,200	
3.20	Planning Commission Adoption Meeting	8	8	0	0	0	4	24	\$4,200	
3.21	City Council Adoption Meetings (2)	16	16	0	0	0	4	44	\$7,900	
3.22	HCD Certification	10	40	0	0	0	0	50	\$9,100	
Task 3 Subtotal:		120	344	0	66	162	568	110	\$202,590	
TASK 4 ENVIRONMENTAL JUSTICE AND SAFETY ELEMENTS										
4.1	Admin. Draft Environmental Justice Element	4	8	0	0	16	40	68	\$9,640	
4.2	Admin. Draft Safety Element	4	8	0	0	20	24	56	\$8,220	
Task 4 Subtotal:		8	16	0	0	36	64	0	\$17,860	
<i>Project Subtotal (hours + budget)</i>		<i>320</i>	<i>698</i>	<i>140</i>	<i>78</i>	<i>260</i>	<i>1,072</i>	<i>410</i>	<i>2,978</i>	
<i>Direct Costs</i>										<i>\$3,500</i>
M-Group Subtotal										\$445,290
SUBCONSULTANT TECHNICAL STUDIES									Total Cost	
TASK 5 - ENVIRONMENTAL, VMT AND FISCAL REVIEWS										
Task 5	ESA - Environmental Impact Report									\$295,990
Task 5	Hexagon - Transportation (VMT) Analysis									\$64,250
Task 5	BAE - AFFH support and Fiscal Impact Analysis									\$49,920
<i>Subtotal All Subconsultants:</i>									\$410,160	
<i>M-Group Subconsultants 10% Contract Administrative Fee:</i>									\$41,016	
Subconsultants Subtotal (Including 10% Admin. Fee):									\$451,176	
Subtotal M-Group and all subconsultants including 10% Admin. Fee:								Subtotal	\$896,466	
<i>10% Contingency (To be used only with City approval)</i>									\$85,545	
Project Total (without Optional Items)									\$982,011	
OPTIONAL TASKS (Includes Contract Management and Contingency Fee)										
1.5	Monthly Advisory Group Meetings (Optional)									\$19,910
2.23	Virtual Housing Symposium (Optional)									\$32,516
2.24	MTC/ABAG Site Selection Tool Assistance (Optional)									\$7,601
2.25	Walking Tours (Optional)									\$4,719
2.26	Outreach Toolkit (Optional)									\$4,928
2.27	Press Releases (Optional)									\$6,908
2.28	Outreach App Development Assistance (Optional)									\$9,075
2.29	Outreach Videos (Optional)									\$6,028
3.23	Objective Design Standards (Optional)									\$90,000
5.26	Hexagon: Additional Public Hearing Attendance (Optional)									\$1,000
5.27	Hexagon: VMT Training Session (Optional)									\$2,000
5.28	Hexagon: LOS Analysis (Optional)									TBD
5.29	BAE: Learning Session on Residential Development Economics (Optional)									\$4,390
5.30	BAE: Development Feasibility Analysis of Potential Site Strategies (Optional)									\$22,530
5.31	BAE: Additional Public Hearing Attendance (Optional)									\$1,600
Subtotal for all Optional Items									\$213,205	
Project Total (with all Optional Items)									\$1,195,216	

NOTES

- M-Group reserves the right to re-allocate hours and include assistance from other planners within M-Group to complete the tasks, as necessary, but within the total budget.
- Cost Proposal is for a Fixed-Fee Contract with monthly invoicing based on percentage task completion.
- Travel time and expenses have been factored into the budget.
- Unexpected issues out of scope or extended timeline out of the control of M-Group may necessitate the need for additional budget.

BAE BUDGET

BAE Budget, Menlo Park Housing Element Update						
	Hours by Staff				Budget	
	Hourly Rate	Principal	Associate	Senior		Senior
		\$310	Principal	Associate		Analyst
Task 1.1: Kick-off Meeting	2	4	4	0	\$2,480	
Task 2.X: Public Study Sessions and/or Hearings	6	24	8	0	\$9,900	
Task 3.X: Affirmatively Furthering Fair Housing Data and Analysis	2	8	10	20	\$6,930	
Task 3.X: Cost to Replace At-Risk Units	0	2	2	10	\$2,030	
Task 5.X: Fiscal Impact Analysis	8	40	60	30	\$28,280	
Subtotal Labor without Optional Tasks	18	78	84	60	\$49,620	
Expenses (mileage and data purchase)					\$300	
Total (Labor + Expenses) without Optional Tasks					\$49,920	
Optional Tasks						
Task A: Learning Session on Residential Development Economics	2	8	6	4	\$4,390	
Task B: Development Feasibility Analysis	8	30	50	20	\$22,530	
Total with Optional Tasks	10	38	56	24	\$76,840	
BAE Attendance at Additional Study Sessions/Public Hearings - Each					\$1,600	

HEXAGON BUDGET

#	Task	President	Principal Associate	Associate	Engineer	Admin/ Graphics	Budget
	Hourly Rate	\$ 290	\$ 250	\$ 195	\$ 155	\$ 110	
1	Travel Demand Model		8		2		\$ 2,310
2	With-Project Land Use and Roadway Network		2	8			\$ 2,060
3	Evaluation of 3 Preliminary Alternatives	12	60	16	4	4	\$ 22,660
4	VMT Analysis	4	16				\$ 5,160
5	Bicycle, Pedestrian and Transit Facilities	4	8	8			\$ 4,720
6	Potential Mitigation Strategies	4	16				\$ 5,160
7	Meetings	5	5				\$ 2,700
8	Reports	4	16		24	4	\$ 9,320
9	Data Provisions for Other EIR Analysis		16				\$ 4,000
10	Response to EIR Comments	4	20				\$ 6,160
	Total	37	167	32	30	8	\$ 64,250

ESA BUDGET

ESA Labor Detail and Expense Summary
City of Menlo Park Housing Element Update Program EIR

8/26/2020

Labor Category		Hillary Gitelman Project Director	Luke Evans Project Manager	Jill Feyk-Miney Deputy Project Manager	Chris Easter Air Quality Director	Cheri Velzy Air Quality Analyst	Sarah Patterson Air Quality Analyst	Breanna Sewell GHG Analyst	Bailey Setzler Energy Analyst	Brian Pittman Biological Resources	Erika Walther Biological Resources	Michael Newland Cultural Resources	Heidi Koenig Cultural Resources	Amber Grady Historic Architectural Resources	Michael Burns HazMat, Hydro, Geo	Brandon Carroll Geo, Minerals, Paleo	Maria Hensel Hydrology Analyst	Chris Sanchez Noise and Vibration	Steve Smith Aesthetics, Transport, Wildfire	Word Processing, Graphics, Production	Subtotal	Total Hours	Labor Price	
Task	Task Name/Description	\$ 275	\$ 225	\$ 150	\$ 225	\$ 190	\$ 150	\$ 105	\$ 125	\$ 225	\$ 150	\$ 225	\$ 175	\$ 150	\$ 205	\$ 105	\$ 125	\$ 190	\$ 175	\$ 125				
1.0	Project Description and Alternatives	8	24	40																8	\$ 14,600	80	\$ 14,600	
2.0	Prepare Notice of Preparation		2	12																	2	\$ 2,250	14	\$ 2,250
3.0	Conduct Scoping Meeting	2	6	12																	2	\$ 3,950	22	\$ 3,950
4.0	Conduct Agency Consultation	2	2	12									2		6							\$ 4,380	24	\$ 4,380
5.0	Prepare Administrative Draft Program EIR																					1,132	\$ 180,220	
	Introduction		2	6																	1	\$ 1,475	9	\$ 1,475
	Summary		2	8												16					2	\$ 3,580	28	\$ 3,580
	Project Description		2	4																	2	\$ 1,300	8	\$ 1,300
	Aesthetics		2																40		2	\$ 7,700	44	\$ 7,700
	Air Quality		2		12	48	48	24	16												1	\$ 24,115	151	\$ 24,115
	Agricultural and Forestry Resources		1	2																	1	\$ 650	4	\$ 650
	Biological Resources		2							2	36										2	\$ 6,550	42	\$ 6,550
	Cultural Resources		2									16	40	40							4	\$ 17,550	102	\$ 17,550
	Energy		2		4	20		24	8												1	\$ 8,795	59	\$ 8,795
	Geology, Paleontology, and Mineral Resources		2													2	40				3	\$ 5,435	47	\$ 5,435
	Greenhouse Gas Emissions		2		8	32		56	16												1	\$ 16,335	115	\$ 16,335
	Hazards and Hazardous Materials		2																		3	\$ 8,205	41	\$ 8,205
	Hydrology and Water Quality		2																		3	\$ 6,235	47	\$ 6,235
	Land Use and Planning	2	2	40																	3	\$ 7,375	47	\$ 7,375
	Noise and Vibration		2		4				16												1	\$ 12,595	71	\$ 12,595
	Population and Housing		2	32																	1	\$ 5,375	35	\$ 5,375
	Public Services and Recreation		2	48																	1	\$ 7,775	51	\$ 7,775
	Transportation and Circulation		8																		2	\$ 9,050	50	\$ 9,050
	Tribal Cultural Resources		1										8								1	\$ 1,750	10	\$ 1,750
	Utilities and Service Systems		2	60																	1	\$ 9,575	63	\$ 9,575
	Wildfire		2																		32	\$ 6,300	36	\$ 6,300
	Other CEQA Sections		1	8																		\$ 1,425	9	\$ 1,425
	Alternatives	4	16	40																	3	\$ 11,075	63	\$ 11,075
6.0	Prepare Public Draft Program EIR	8	16	32	2	2				2			2	2	2		2	2	2			\$ 13,770	74	\$ 13,770
7.0	Prepare Responses to Comments	12	48	80		8				6			2	2	4			2				\$ 30,370	164	\$ 30,370
8.0	Prepare Final Program EIR, Findings, and MMRP		16	32																		\$ 8,400	48	\$ 8,400
9.0	Project Coordination Meetings and Project Management	12	84	80																		\$ 34,200	176	\$ 34,200
Total Hours		50	261	548	30	110	48	104	56	2	44	16	54	44	52	56	42	52	114	51	-	1,734		
Total Labor Costs		\$ 13,750	\$ 58,725	\$ 82,200	\$ 6,750	\$ 20,900	\$ 7,200	\$ 10,920	\$ 7,000	\$ 450	\$ 6,600	\$ 3,600	\$ 9,450	\$ 6,600	\$ 10,660	\$ 5,880	\$ 5,250	\$ 9,880	\$ 19,950	\$ 6,375	\$ 36,205		\$ 292,140	

ESA Labor Cost	\$	292,140
ESA Reimbursable Expenses	\$	3,850
Subconsultant Costs	\$	-

PROJECT TOTAL																							\$ 295,990
----------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	-------------------



page left blank



SCHEDULE

The following section provides a preliminary project schedule. M-Group has made a careful assessment of the tasks involved in preparing a Housing Element Update for the City of Menlo Park. We have considered all options to maximize progress toward plan completion and build in ample opportunities for participation, whether through public hearing held by the GPAC, or through more target public outreach activities. This schedule may be refined in collaboration with the City staff.



page left blank

Menlo Park Housing Element Update Schedule	2021											2022										
	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
TASK 1 PROJECT ADMINISTRATION																						
1.1 Project Kick-off meeting																						
1.2 Finalize and Update Schedule																						
1.3 Project Management and Coordination																						
1.4 Coordination with HCD																						
1.5 <i>Monthly Advisory Group Meetings (Optional)</i>																						
TASK 2 COMMUNITY ENGAGEMENT STRATEGY																						
2.1 Community Engagement Plan																						
2.2 Webpage																						
2.3 Master Contact List																						
2.4 Partner with Local Non-Profit Community Groups																						
2.5 Social Media																						
2.6 Electronic Media																						
2.7 Print Media/PDF Utilization																						
2.8 General Survey																						
2.9 Housing Introduction Seminar																						
2.10 Focus Groups																						
2.11 Individual Interviews																						
2.12 General Outreach Meetings by Council District																						
2.13 Project Gallery																						
2.14 Farmers Market Pop-Up Booth																						
2.15 Preliminary Land Use Strategies: Housing Commission																						
2.16 Housing Workshop																						
2.17 Land Use Meeting: Planning Commission																						
2.18 Preliminary Land Use Alternatives: City Council																						
2.19 Preferred Land Use Concept: Planning Commission																						
2.20 Draft EJ & Safety Element to Planning Commission																						
2.21 NOP/Scoping Meeting at Planning Commission																						
2.22 Draft EIR at Planning Commission																						
2.23 <i>Virtual Housing Symposium (Optional)</i>																						
2.24 <i>MTC/ABG Site Selection Tool Assistance (Optional)</i>																						
2.25 <i>Walking Tours (Optional)</i>																						
2.26 <i>Outreach Toolkit (Optional)</i>																						
2.27 <i>Press Releases (Optional)</i>																						
2.28 <i>Outreach App Development Assistance (Optional)</i>																						
2.29 <i>Outreach Videos (Optional)</i>																						
TASK 3 HOUSING ELEMENT AND RELATED WORK																						
3.1 Document Review																						
3.2 List of Current General Plan Policies and Programs																						
3.3 Review and Evaluation of Current Housing Element																						
3.4 Review City's RHNA Allocation																						
3.5 Review City's Vacant and Underutilized Land Inventory																						
3.6 Compile GIS Shapefiles																						
3.7 Use of GIS for Site Selection & AFFH																						
3.8 Prepare Land Use Options in GIS																						
3.9 Site Inventory and RHNA																						
3.10 Housing Needs Assessment																						
3.11 Potential Governmental and Non-Governmental Constraints																						
3.12 At-Risk Units																						
3.13 Housing Objectives, Policies, and Programs																						
3.14 Admin. Draft Housing Element																						
3.15 Admin. Draft Land Use Element																						
3.16 Admin. Zoning Ordinance and Zoning Map																						
3.17 Public Review Draft Housing, Safety, Environmental Justice, Land Use Elements + Zoning Code and Map																						
3.18 Final Draft Housing Element, Safety Element, Environmental Justice Element, Land Use Element, and Zoning Changes																						
3.19 Housing Commission Adoption Meeting																						
3.20 Planning Commission Adoption Meeting																						
3.21 City Council Adoption Meetings (2)																						
3.22 HCD Certification																						
3.23 <i>Objective Design Standards (Optional)</i>																						
TASK 4 ENVIRONMENTAL JUSTICE AND SAFETY ELEMENT																						
4.1 Admin. Draft Environmental Justice Element																						
4.2 Admin. Draft Safety Element																						
TASK 5 ENVIRONMENTAL, VMT, AND FISCAL REVIEWS																						
5.1 ESA: Project Initiation and Data Collection																						
5.2 ESA: Project Description and Alternatives Development																						
5.3 ESA: Notice of Preparation																						
5.4 ESA: NOP Scoping Meeting																						
5.5 Agency Consultation																						
5.6 ESA: Prepare Admin. Draft Program SEIR																						
Tribal Consultation by Menlo Park																						
5.7 ESA: Public Draft Program EIR																						
5.8 ESA: Prepare Responses to Comments																						
5.9 ESA: Prepare Final Program SEIR and Mitigation Monitoring and Reporting Plan																						
5.10 ESA: Project Coordination Meetings and Project Management																						
5.11 Hexagon: Travel Demand Model																						
5.12 Hexagon: With-Project Land Use and Roadway Network																						
5.13 Hexagon: Evaluation of 3 Preliminary Alternatives																						
5.14 Hexagon: VMT Analysis																						
5.15 Hexagon: Bicycle, Pedestrian, and Transit Facilities																						
5.16 Hexagon: Potential Mitigation Strategies																						
5.17 Hexagon: Meetings																						
5.18 Hexagon: Traffic Impact Assessment																						
5.19 Hexagon: Data Provisions for Other EIR Analysis																						
5.20 Hexagon: Response to EIR Comments																						
5.21 BAE: Kick-off Meeting																						
5.22 BAE: Public Study Sessions and/or Hearings																						
5.23 BAE: Affirmatively Furthering Fair Housing Data and Analysis																						
5.24 BAE: Cost to Replace At-Risk Units																						
5.25 BAE: Fiscal Impact Analysis																						
5.26 Hexagon: Additional Public Hearing Attendance (Optional)																						
5.27 Hexagon: VMT Training Session (Optional)																						
5.28 Hexagon: LOS Analysis (Optional)																						
5.29 BAE: Learning Session on Residential Development Economics (Optional)																						
5.30 BAE: Development Feasibility Analysis of Potential Site Strategies (Optional)																						
5.31 BAE: Additional Public Hearing Attendance (Optional)																						



█ Bold indicates major milestones



page left blank

APPENDIX A



THINK

Initial Assessment

Purpose of this template: To contemplate the various components, resources and constraints that come into play when planning a public engagement process.

Directions: Fill in the document the best you can; you do not need to go in order.

Category	Fill in if applicable	Note
Title of effort	Menlo Park Housing Element Update	Internal title or formal title.
Time horizon	March 2021 - December 2022 (22 months)	Weeks/ months.
Geographic focus	City of Menlo Park	Whole jurisdiction or subsection; be specific.
Target outreach groups	Everyone who wants to be involved, as well as folks who don't know they want to be involved yet. Community based advocacy groups, communities of color, homeowners, renters, business owners, community/faith based organizations, families with young children, students, seniors, non-english monolingual speakers, persons with disabilities, people living in areas identified by SB 1000 analysis, if any.	E.g.: Homeowners, renters, youth, ethnic groups, business owners, parents of afterschool program recipients.
Level of public input desired	High (IAP2 Collaborate). The Housing Element has the potential to bring significant change to the city, and is a departure from past Housing Elements. Implementation and desirability of the plan improves with strong community collaboration in plan development. The final plan must also account for state requirements and development feasibility. <i>Tip: Address this category when resource constraints are clear.</i>	Could depend on: the amount of time/ resources available; significance of issue; what just happened or is coming soon with other engagement. See also IAP2 Engagement Spectrum

Shaping the Future Together: A Guide to Practical Public Engagement for Local Governments

THINK

INITIATE

ENGAGE

REVIEW

SHIFT

Potential components of in person engagement	Pop-up workshops (staffed or not) in areas with significant foot traffic (e.g. farmers markets, grocery stores), stakeholder interviews, small focus groups, community meetings and open houses, community group meetings (e.g. providing information at Chamber of Commerce meetings), walking tours, real-time polling at in-person events, graphic facilitation, utility mailers.	E.g.: Small meetings with stakeholders, focus groups, town hall, workshops, open house, listening sessions (similar to coffee with a cop).
Digital components	Surveys (text- and map-based); project website; online civic engagement platform; online open houses that mirror in-person community meetings; instant polling; social media and email announcements; instructional videos; outreach app virtual meeting facilitation (Miro or similar), QR codes posted at busy in-person locations that lead folks to online surveys.	E.g.: Website; surveys; instant polling; ideation; etc.
Outreach efforts	See Outreach Template	
Potential locations to hold events/ meetings	Government buildings; farmers markets, parks, and other outdoor public spaces; grocery stores; schools; community centers; libraries	E.g.: Community Centers, schools, libraries, government buildings, faith-based, community rooms at institutions such as banks, foundations, non- profits, etc.
Lead staff	Planning Division of Menlo Park.	Name(s); roles
Supporting staff	Community Services Department; School Districts; City Attorney's Office	E.g.: PIOs, Manager's Office, CAO's Office, Director's Office, I.T., printing department; utilities (for mailers), etc.
Consultant(s) (If applicable)	M-Group: Geoff I. Bradley/Project Manager Sung H. Kwon/Deputy Project Manager Christina Paul/Engagement Lead Other M-Group staff as needed	Name(s)/ role(s)



Role(s) of Electeds	Study sessions on the vision, objectives, and key issues to address in the Update; adoption of Housing Element Update; sharing information on community engagement opportunities with constituents when applicable	E.g.: Welcoming at meetings in their area, keeping those with keen interest in the loop regularly; involving elected/ their staff in planning of events.
Key stakeholders	Boys and Girls Clubs of the Peninsula, Hello Housing, Housing Leadership Council, Silicon Valley Community Foundation, Peninsula Volunteers, Cañada College SparkPoint, Lifemoves, Home for All SMC, YPLAN, Belle Haven Action, Belle Haven Youth Center, YUCA: Youth United for Community Action, Mid-Peninsula Housing, Project WeHope, JobTrain, Inc, Samaritan House, Peninsula Family Service, Menlo Park Chamber of Commerce, San Mateo County Union Community Alliance, Menlo Together, Faith in Action Bay Area, Belle Haven Development Fund, PANDAS Network,	Quick list of a few key stakeholders; these folks should have various perspectives on the issue(s). Make phone calls to run these very first ideas by them. At least three phone calls (example script below) <ul style="list-style-type: none"> • This is __. I’m exploring an issue and I was hoping to get some quick, initial feedback from you on it – if you have time. • It’s __Name issue __; we’ve got about __weeks/mo__ to connect with the community on their views so we are exploring how we might do that. • What are your initial, just gut level thoughts on what the (City/County/Special District) should do? • [If appropriate] Right now we are contemplating __activities... What do you think? • This is my final question, If I was going to call 3 more folks on this who do you think we should reach out to?
Budget	\$: \$162,830 Staff time:	If no dollar budget, note ‘in house’ or in-kind resources that are important. Staffing: Be sure to consider how much time it is likely to take to input public feedback, analyze and/or theme input, and, if applicable, prepare input summary for public view.



<p>Tricky potential issues</p>	<p>Covid-19 limitations will restrict in-person engagement efforts. It is always a challenge to reach busy people (particularly those who don't regularly engage in governmental processes) and engage then in the planning process. Planning for housing can be very triggering for folks who may not immediately see the positive potential benefits of change.</p>	<p>Consider <u>Internal challenges</u> (eg. Over these three months we are switching IT servers; over these months our Director is retiring).</p> <p>Consider <u>External challenges</u> (eg. very vocal group will be against; a business is being built in that area and residents are still upset about how that went; Measure __ failed two months ago and people might associate this with that; A recent police shooting has neighborhood on edge and especially distrustful of government).</p>
<p>Legal consideration</p>	<p>Policies and site inventory in the Housing Element will need to be in compliance with fair housing laws and other new State housing laws and requirements.</p>	<p>Policy or legal issues to consider-work with your legal counsel (city attorney, county council, etc.).</p>
<p>What happens with public input</p>	<p>Public input is an integral part of the planning process. We need this expertise, and we need public support to create a successful, implementable plan. The response to this varies greatly on the point in the planning process we're at, and what the comment was. All comments are taken into consideration and can be shared with decision makers. Consolidated comments or data are used to shape plan direction.</p>	<p>If a resident asks "What happened to my input/ suggestion" what are you going to say.</p>

About the Institute for Local Government

The Institute for Local Government’s (ILG) mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities, the California State Association of Counties and the California Special Districts Association.

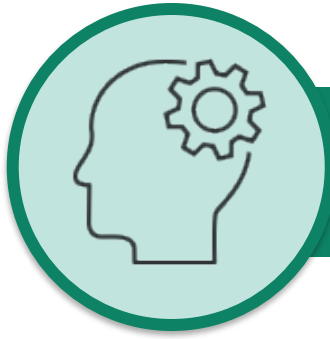
For more information about the TIERS Framework and Learning Lab, please contact publicengagement@ca-ilg.org

To access the Institute’s resources on public engagement, visit www.ca-ilg.org/engagement

© 2017 Institute for Local Government. All rights reserved.

Shaping the Future Together: A Guide to Practical Public Engagement for Local Governments





THINK

Public Engagement Approach

Purpose of this template: To help you think through an effective Public Engagement Approach.

Directions: Use this template to create your own Public Engagement Approach. Consider what actions should be in-person versus digital efforts.

PART A: Brainstorm Elements

In-person Efforts

Category	Examples	Brainstorm
'Smaller' Engagement Efforts	<ul style="list-style-type: none"> ○ 'Coffee' meetings w/ 1 or 2 stakeholders ○ Small group meetings (one stakeholder group for ex) ○ House parties ○ Focus groups (informal) 	<ul style="list-style-type: none"> -Stakeholder Interviews (1-2 people) -Focus groups(~5 people) -Stakeholder meetings with community-based organizations and advocacy groups (up to 20 people)
'Larger' Public Meetings	<ul style="list-style-type: none"> ○ Workshop ○ Townhall ○ Gallery Walk ○ Table Level Facilitated Groups (6-8 people per table) ○ Open Space ○ Conversation Cafe ○ Other dialogue techniques 	<ul style="list-style-type: none"> - Pop-up workshops (informal) - Open houses and community workshops with small group facilitation - Online synchronous open houses and community meetings - Self-guided tour of development opportunity sites - Guided tour of development opportunity sites

Digital Efforts

Category	Examples	Brainstorm
Inform... Presenting information	<ul style="list-style-type: none"> ○ Website ○ Newsletter ○ Blogs ○ Infographics ○ Visual simulations 	<ul style="list-style-type: none"> - Project website - Social media/email newsletter - Print media: flyers, mailers - Videos - 3D models of potential development
Consult... Ask community for input on a defined issues	<ul style="list-style-type: none"> ○ Survey ○ Poll ○ Budget Challenge 	<ul style="list-style-type: none"> - Surveys (text and map based) - Real-time polling - Design Charette - RHNA "Budget" exercise: Where would you put the units? (in person or on Miro) - Sticky dot exercises and other interactive exercises at open houses
Involve... Community helps to define the issue w their input	<ul style="list-style-type: none"> ○ Ideation ○ Prioritization ○ Mapping ○ Online forum ○ Trade off exercises 	<ul style="list-style-type: none"> - Online Open House with polling or survey where the community will be able to identify their priorities and concerns - Visioning session: identify opportunities and constraints, brainstorm visions for the future - RHNA "Budget" exercise: Where would you put the units? (in person or on Miro)
Collaborate... Community helps decide and/or implement	<ul style="list-style-type: none"> ○ Interactive community planning platforms ○ Joint data generation apps ○ Collaborative writing/ hacking ○ Neighbor to neighbor apps 	<p>There are a lot of great tools out there, and offerings change all the time. Here are a few in our toolbox: Maptionnaire (surveys, map-based data, budgeting, and meeting facilitation), Miro (DIY activities of many kinds), MetroQuest, Poll Everywhere. Many of these can be used with minimal training. Other tools, such as SketchUp and Urban Footprint, can be used in community meetings with a facilitator.</p>

Questions to Consider

- Who will facilitate?
- Who will take notes?
- What are options for providing comment (hand written/ verbal/ post-it/ dots/ etc.)?
- Who will compile comments that are gathered?
- Who/ how will data be 'themed' and analyzed?
- What will be done with 'off-topic' comments or concerns?
- What is 'Plan B' if there are very disruptive folks/people with very strong emotions/concerns?
- How will in-person input be aggregated with input received online?
- How/when will public see what happened to their comments?

PART B: Draft Plan

Element	Staffing. # of Staffer(s)	Cost. Beyond staff time is there a cost for the element?	Time. How time intensive? 1-5 (1 less intensive, 5 very intensive)
<i>[Example] Survey (internal)</i>	<i>1 or 2 staffers (draft and review)</i>	<i>No. Our agency already has a subscription</i>	<i>1. Won't take too long to draft and send</i>
<i>[Example] 'Coffee meetings' w 10 key stakeholders</i>	<i>2 lead staffers. Some meetings together; some divided.</i>	<i>Very little. (coffee!) Travel.</i>	<i>1-3. depends on project</i>
General Outreach meetings by Council District	2-3 M-Group staff	\$9,700	3. Time for prep, meetings, and summary
Farmers Market Pop-up	2 M-Group staff City staff	\$4,960	1 Time for prep and attendance
Focus Groups	2-3 M-Group Staff City staff	\$10,600	3 Preparation of questions, group sessions and summary
Print Media	3-5 M-Group staff City staff	\$6,760	4 Preparation and distribution of hard copies would take time and effort.
Virtual Housing Symposium (Optional)	6-8 M-Group Staff City staff Others	\$32,516	5. Very time consuming with a variety of people involved
Project Gallery	2-3 M-Group staff	\$5,140	2 Time to set up the gallery and update materials

About the Institute for Local Government

The Institute for Local Government's (ILG) mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities, the California State Association of Counties and the California Special Districts Association.

For more information about the TIERS Framework and Learning Lab, please contact publicengagement@ca-ilg.org

To access the Institute's resources on public engagement, visit www.ca-ilg.org/engagement

© 2018 Institute for Local Government. All rights reserved.

APPENDIX B

RESUMES

M-GROUP

GEOFF I. BRADLEY, AICP
SUNG H. KWON, AICP
CHRISTINA PAUL, AICP
TOM FORD, AICP
PAYAL BHAGAT
JUSTIN SHIU, AICP

BAE

MATT KOWTA, MCP
STEPHANIE HAGAR, MCP
CHELSEA GUERRERO, MCP
MIKI KOBAYASHI

ESA

HILLARY GITELMAN
LUKE EVANS
JILL FEYK-MINEY

HEXAGON

GARY BLACK
OLLIE ZHOU



page left blank

GEOFF I. BRADLEY, AICP

PRINCIPAL + PRESIDENT



EXPERIENCE

M-Group

President + Principal
2006 – Present

Geoff has over 27 years of professional public and private experience working for architecture, planning, development firms and public agencies. This includes 10 years of fast-paced public sector experience with Bay Area planning and redevelopment agencies and over 15 years of private sector experience. Geoff has worked closely with numerous cities throughout the Bay Area. His work includes General Plans, Housing Elements and Zoning Codes as well as downtown revitalization, major commercial, mixed-use and innovative transit-oriented projects. Geoff is a results-oriented planning professional with a strong design background in architecture, urban design and landscape architecture. He is highly motivated to work to improve our natural and man-made places with an ability to combine innovative ideas with pragmatic solutions.

EDUCATION

Master of Science in Architecture

California Polytechnic State
University, San Luis Obispo
San Luis Obispo, CA

Bachelor of Science in City & Regional Planning

California Polytechnic State
University, San Luis Obispo
San Luis Obispo, CA

Landscape Architecture & Urban Studies

University of Sheffield, U.K.

MEMBERSHIPS

American Planning Association

American Institute of Certified
Planners

SPUR

Silicon Valley Bicycle Coalition
Californians for Electoral Reform

AWARDS

Award for Comprehensive Plan: Mill
Valley General Plan (Housing
Element), APA California

AREAS OF EXPERTISE

Visioning/General Plan and Zoning Code Updates
Community Engagement/Consensus Building
Ordinance Preparation/Planning Department Management
Environmental Review
Development Review/Design Review
Site Planning & Urban Design/Design Guidelines
Entitlements for Complex Projects

POLICY PLANNING

GENERAL PLAN UPDATE | CITY OF SAUSALITO, CA

Currently in the final phase of a comprehensive update of the Sausalito General Plan. The General Plan Update involves a review of existing conditions, development of a refined vision for the City, and establishment of goals and guiding principles. M-Group is in the finale phase of the project which was community outreach intensive with robust citizen participation.

GENERAL PLAN 2030 | CITY OF BELVEDERE, CA

Led a team of consultants to provide Belvedere with a document that articulates the community vision and provides guidance for the future. Worked closely with City staff and decision makers to forge consensus on difficult issues. Developed creative strategies for successful infill and second units to provide new housing opportunities.

ENVISION DALY CITY 2030: A FRAMEWORK FOR THE FUTURE | CITY OF DALY CITY, CA

Led and supervised the effort to assist Daly City staff with the General Plan Update by conducting a well-attended and dynamic Visioning session. Oversaw the completion of a graphically oriented workbook that documented the vision and community prioritization process.

GEOFF I. BRADLEY, AICP

PRINCIPAL + PRESIDENT

Design a monument to Silicon Valley
Grand Prize Winner, San Jose
Mercury News

Logo Design Contest, Shop
Sunnyvale

National Talent Search Winner,
Pratt Institute of Design

LEADERSHIP

Cal Poly City & Regional Planning
Advisory Committee Founding
Member

Co-Director, APA Northern California
Membership 2013-2016
ULI UrbanPlan Volunteer
Sunday Friends Volunteer

PRESENTATIONS

2010 City of Vallejo Speaker Series
Reinventing City Government
Panel Member

2012 Planners Institute
Doing More with Less - Success
Stories, Panel Member

2015 Planners Institute
Planning Essentials 101
Panel Member

HOUSING ELEMENTS: 2015 – 2023 PLANNING PERIOD | *VARIOUS CITIES, CA*

Principal-in-charge of seven successful Housing Element updates for many of the same Cities as the previous cycle. Led a team of planners and sub-consultants and worked collaboratively with Cities to develop successful housing strategies to address a combined RHNA of nearly 3,000 housing units. Worked closely with HCD staff to ensure a smooth certification process.

Clients: City of Burlingame, City of Campbell, City of Mill Valley, City of San Rafael, City of Saratoga, City of Sausalito, and City of Sonoma.

HOUSING ELEMENTS: 2009 – 2014 PLANNING PERIOD | *VARIOUS CITIES, CA*

Principal-in-charge of numerous successful Housing Element updates. Led a team of planners and sub-consultants and worked collaboratively with City staff to develop innovative housing strategies to address a combined RHNA of over 2,500 housing units. Developed a solid working relationship with HCD staff that allowed for timely certification of all the Housing Elements undertaken.

Clients: City of Belvedere, City of Burlingame, City of Campbell, Town of Los Altos Hills, City of Mill Valley (APA Award Winner), City of Sausalito, and City of Sonoma.

ENVIRONMENTAL REVIEW

EIR FOR THE RIVERFRONT MIXED-USE PROJECT | *CITY OF PETALUMA, CA*

Principal-in-charge for the preparation of an EIR for the Riverfront project in Petaluma. The 39-acre tentative subdivision map and rezone included developing 237 residential units, 60,000 square feet of office, 30,000 square feet of retail, a 120-room hotel, and a 3.5-acre recreational park. M-Group staff coordinated with technical experts to establish baseline conditions and determine potential environmental impacts. A DEIR was prepared that identified project impacts and mitigation measures for Air Quality and Greenhouse Gases, Biological Resources, Cultural Resources, Hazards and Hazardous Materials, Hydrology and Water Quality, Geology and Soils, Noise, and Traffic. The FEIR was approved by the Petaluma City Council in July 2014.

EIR FOR THE 2020 GENERAL PLAN | *CITY OF CAMPBELL, CA*

Managed a successful comprehensive General Plan Update, including EIR and Housing Element for 1999-2006 planning period while Senior Planner for the City of Campbell. Coordinated several consultants and led a robust community outreach effort that resulted in widespread citizen involvement in the process.

IS/MNDS FOR HOUSING ELEMENTS: 2015 – 2023 PLANNING PERIOD |

VARIOUS CITIES, CA

Principal-in-charge of seven successful Housing Element updates and all their respective IS/MNDS for many of the same Cities as the previous cycle. Led a team of planners and sub-consultants and worked collaboratively with Cities to develop successful housing strategies to address a combined RHNA of nearly 3,000 housing units. Worked closely with HCD staff to ensure a smooth certification process.

Clients: City of Burlingame, City of Campbell, City of Mill Valley, City of San Rafael, City of Saratoga, City of Sausalito, and City of Sonoma.

SUNG H. KWON, MCRP MBA AICP

PRINCIPAL PLANNER



EXPERIENCE

M-Group

Principal Planner
Oct 2020 – Present

Town of Tiburon

Community Development Director
Jan 2019 – Feb 2020
Planning Manager
Mar 2018 – Dec 2018

City of Saratoga

Senior Planner
May 2016 – Mar 2018

County of Tulare

Planner IV
Aug 2012 – Apr 2016

City of Oakland

Planner III
Aug 2012 – Apr 2016

City of Orinda

Assistant/Associate Planner
Mar 2003 – April 2006

RBF Consulting

Planner/Urban Designer
Sept 2000 – Feb 2003

EDUCATION

Master of Business Administration

Simon Graduate School of business,
University of Rochester
Rochester, NY

Master of City & Regional Planning

California Polytechnic State
University
San Luis Obispo, CA

Bachelor of Arts – Architecture

University of California, Berkeley

Sung H. Kwon is a seasoned and well-rounded planning professional with over 15 years of experience. He has in-depth knowledge in the fields of Housing Policy, Environmental Review, Land Use Planning, Development Review, Urban Design, GIS, and Financial Analysis. Sung is a highly experienced project manager with strong skills in verbal and written communication, collaboration, community and stakeholder engagement, and consensus building. He values ingenuity balanced with sensibility and is motivated by the challenge of presenting innovative, data driven, forward thinking solutions.

AREAS OF EXPERTISE

Policy Planning

Environmental Review

Historic Preservation

Development and Architectural Review

Urban Design

Community Development/Outreach

Geographic Information Systems/Data Management

HIGHLIGHT OF POLICY PROJECTS

STANFORD COMMUNITY PLAN 2020 | COUNTY OF SANTA CLARA, CA

(Ongoing) Assisting in the preparation of the Stanford Community Plan. Providing project management, editing staff reports, providing strategic direction to County Staff, conducting outreach, and coordinating the preparation of the Stanford Design Guidelines and technical studies.

AMEND ZONING ORDINANCE FOR STREAMLINING | CITY OF VENTURA, CA

(Ongoing) As Project Manager, amending the Zoning Ordinance to streamline the project review process. This involves shift Design Review Committee authority to Planning Commission and Administrative Hearing Officer.

HOUSING ELEMENT (5TH CYCLE) | COUNTY OF TULARE, CA

Managed the preparation of the Housing Element for Tulare County, 5th cycle which involved directing the work of two staff members. The Housing Element was certified by HCD.

VARIOUS COMMUNITY PLANS | COUNTY OF TULARE, CA

Authored community plans including marketing study, economic strategies, design guidelines & zoning code/land use changes for six (6) communities: Goshen, Pixley, Earlimart, Terra Bella, Ducor, and Traver.

LOS BANOS DOWNTOWN REDEVELOPMENT STRATEGY AND CIVIC CENTER MASTER PLAN, STREETScape DESIGN, DESIGN STANDARDS, MULTI-USE TRAIL DESIGN | CITY OF LOS BANOS, CA

Prepared land use analysis diagrams, design concepts, and policy documents. Facilitated a series of workshops including an overall contextual summary, visual preference survey, design charrettes, and other project specific workshops. This project was prepared to

SUNG H. KWON, MCRP MBA AICP

PRINCIPAL PLANNER

Berkeley, CA

serve as a guide for future development and redevelopment in the historic downtown core and the abandoned rail corridor.

MEMBERSHIPS

American Planning Association
American Institute of Certified Planners

Prepared Downtown Commercial Design Standards (Design Guidelines) for the City of Los Banos. This document addressed Architectural Character, Site Planning, Parking, Redevelopment/Rehabilitation of Historic Structures, Landscaping, Lighting, Signage, and Streetscape Design. The policies within this document were very specific and utilized both pictures and diagrams to visually illustrate the requirements for the downtown.

SERVICE AND LEADERSHIP

Vice President of Administration

California Chapter, American Planning Association 2018

HIGHLIGHT OF ENVIRONMENTAL PROJECTS

SAUSALITO GENERAL PLAN EIR | CITY OF SAUSALITO, CA

Provided high level environmental expertise. Assisted with response to comments.

Director of Administration & Finance

Central Section, California Chapter, American Planning Association 2013 – 2016

IS/MND FOR TIMBER STREET SENIOR HOUSING PROJECT | CITY OF NEWARK, CA

(Ongoing) Managing the preparation of an Initial Study/MND for a 79-unit senior housing project. This project also included a zone change, general plan amendment, and density bonus.

Secretary/Treasurer

Urban Design & Preservation Division, American Planning Association 2002 – 2006

MOFFETT PARK SPECIFIC PLAN & EIR | CITY OF SUNNYVALE, CA

Prepared portions of both the Specific Plan and EIR. This project was prepared to guide the comprehensive planning policy and regulatory standards to ensure future development and redevelopment of the Moffett Park area in the City of Sunnyvale. Potential build out of this plan included 24.3 million square feet of development, which was an 8.7 million square foot increase over the existing conditions. Specific uses included commercial, office, industrial and a light-rail station. The Circulation Plan included analysis of roadway improvements, rail lines, bus facilities, pedestrian trails, and bikeways.

AWARDS

Innovative Use of Technology Award: Mission Bay Mitigation Monitoring Website

American Planning Association, California Chapter (2001)

ST. VINCENT'S REDEVELOPMENT PLAN EIR & LAND USE ALTERNATIVE DESIGNS SILVERIA PROPERTY | CITY OF SAN RAFAEL, CA

Prepared site & environmental analysis, land use analysis, and design concepts for this large development proposal in San Rafael, CA. This proposal included 766 housing units, 124,000 square feet of commercial space, 5.1 acres of mixed-use development, and a new 80,000 square foot campus for the St. Vincent's School for Boys, and recreational and open space. This project included annexation, pre-zoning for a portion of the property and General Plan Amendment that was to be consistent with the goals and objectives of the St. Vincent's/Silveria Advisory Task Force Recommendations.

Outstanding Public Involvement/Education Program: Mission Bay Mitigation Monitoring Website

California Association of Environmental Professionals (2001)

SAND CREEK SHOPPING CENTER INITIAL STUDY/MITIGATED NEGATIVE DECLARATION | CITY OF BRENTWOOD, CA

Managed the preparation of an Initial study for the new Sand Creek Shopping Center located in the City of Brentwood in East Contra Costa County. An Initial Study was prepared for this project sites to assist in the preparation of a Mitigated Negative Declaration. The Sand Creek Shopping Center project would result in the development of an approximately 23 acres site zoned for commercial use. The preliminary site plan included areas for five anchors, two mini anchors and several small retail spaces. Critical environmental issues assessed included traffic, hazardous waste, water availability, noise, and public services.

Award of Merit: City of Orinda Planning Department Website

American Planning Association, Northern California Section (2004)

Academic Award of Merit: Great Valley Great Issues

Comprehensive Regional Plan & Laurel Street Village Affordable Housing Project (Co-winner)

American Planning Association, California Chapter (2000)

CHRISTINA PAUL, AICP

PRINCIPAL POLICY PLANNER



EXPERIENCE

M-Group

Principal Policy Planner
Sep 2019 – Present

Cygnus Planning

Principal/Owner
May 2018 – Present
Oakland, CA

Dyett & Bhatia

Associate Principal
2018 – 2019
Oakland, CA

MIG

Project Manager
2012 – 2018
Berkeley, CA

Sasaki Associates

Urban + Campus Planner
2010 – 2012
San Francisco, CA

City of Oakland

Intern
2009
Oakland, CA

Ogilvy and Mather

Art Director
2004, 2006 – 2008
San Francisco, CA

EDUCATION

Master of Planning and Urban Design

Massachusetts Institute of Technology
Cambridge, MA

Christina has a background in urban planning and design with an emphasis on strategic interventions and over a decade's experience managing planning consulting projects. She has experience with a variety of complex project types, including institutional master plans, general plans, specific plans, zoning updates, transportation plans, and sustainability projects. She is personable and creative and thrives in dynamic environments. Christina's project management style is exacting and thorough, with a focus on teamwork and ingenuity. Her skill set includes technical writing, graphic design, data visualization, and geographic information systems.

AREAS OF EXPERTISE

Policy Planning
Urban Planning + Design
Strategic Planning
Project Management
Community Outreach

URBAN PLANNING & DESIGN

TRANSIT AREA SPECIFIC PLANNING | MILPITAS, CA

Leading M-Group's partnership with a local urban design firm to develop a specific plan for the Milpitas Transit Station area, surrounding the recently opened BART and VTA transit hub. Christina is working with the City to develop an approach to accommodate RHNA city-wide, with a particular focus on the plan area, and is developing a by-right housing zoning tool to promote affordable housing development. The policy elements of this plan are tightly connected to urban design interventions aid at creating a complete, walkable Milpitas Metro district.

LONG-RANGE PLANNING | PETALUMA, CA

Working with the City of Petaluma on a variety of long-range planning activities, including establishing a new Priority Development Area (PDA) within the City and developing Objective Design Standards for residential development. Christina is also guiding the City as it sets the direction for an upcoming General Plan update, and works to comply with and understand the ramifications of recent affordable housing legislation.

URBAN CORPORATE CAMPUS PLANNING | SAN BRUNO, CA

Assisted the City of San Bruno by preparing a Specific Plan for the area surrounding the YouTube headquarters. This planning area is an urban infill site that YouTube planned to develop over a decade. The goal of this plan was to accommodate the needs of local property owners while ensuring that the area remained a strong, accessible and welcoming asset to the community. The plan was developed in tandem with a full Environmental Impact Report and included zoning regulations, design guidelines and detailed transportation demand management policies.

HEALTH & SUSTAINABILITY GENERAL PLAN ELEMENT | BALDWIN PARK, CA

Wrote the Health and Sustainability General Plan element for the City of Baldwin Park.

CHRISTINA PAUL, AICP

PRINCIPAL POLICY PLANNER

Bachelor of Fine Arts (Graphic Design)

California College of the Arts
Oakland, CA

Bachelor of Arts

Reed College
Portland, OR

MEMBERSHIPS

American Institute of Certified Planners (AICP)

American Planning Association (APA)

Baldwin Park is a small city in the Los Angeles Basin that is heavily impacted by pollution as well as population characteristics that correlate with health concerns. Christina worked with the City to understand planning best practices and precedents, as well as the environmental risks and population needs the City was facing, to develop highly engaging and locally-appropriate engagement materials, and to develop a plan that would increase resident health and city-wide sustainability. This General Plan Element was awarded the California APA First Prize for a Comprehensive Plan for a Small Jurisdiction in 2016.

PRECISE PLANNING | BRISBANE, CA

Developed a precise plan, including urban design, design guidelines and zoning, for the City of Brisbane in order to bring this small city into compliance with RHNA. The tight-knit community faced significant development pressures to develop housing in the valuable area just south of San Francisco. The local community welcomed this opportunity to shape and encourage smaller-scale development close to the heart of town, which would also serve to tie in outlying neighborhoods. The planning process was highly participatory, including a planning festival that shut down the main street into town and restriped roads to demonstrate potential bike paths.

ACTIVE TRANSPORTATION AND PARKS PLANNING | FORT WORTH, TX

Worked with the City of Fort Worth, Tarrant County Regional Water District, and a local river stewardship organization to develop a 20-year plan for the Trinity River, which with 88 miles of river and 72 miles (and growing) of trails represents a world-class recreational and active transportation facility. This plan established transformational projects along each branch of the river and each neighborhood of the city, tying the community together, increasing public health, and celebrating this unique resource.

STATION AREA CORRIDOR PLANNING | EL CERRITO, CA

Prepared a Specific Plan for the San Pablo Avenue Corridor in El Cerrito. The planning area included two BART stations and was focused on increasing the vitality and economic viability of development along the corridor. The plan consists of detailed design regulations and guidelines for streets and districts that vary according to the appropriate development intensities in each area.

STRATEGIC PLANNING

STRATEGIC PLANNING | DOWNTOWN LONG BEACH ASSOCIATES

Worked with the client to update their organizational plan to reflect ongoing investment in the Downtown area as well as expanded Business Improvement District boundaries. Established a new project management system that made the strategic plan an integrated part of day-to-day functioning in the office. Conducted Board of Trustees training as well as stakeholder interviews and outreach at public events.

STRATEGIC PLANNING | UNION SQUARE BUSINESS IMPROVEMENT DISTRICT

Prepared an updated Strategic Plan for the BID, including an exhaustive existing conditions analysis and set of related policies to address: shifting retail trends and increased vacancy in San Francisco's most well-known retail hub; homelessness and the need for social services; tourism; streetscape improvements; Board of Trustees engagement; and organizational efficiency.

TOM FORD, AICP

DIRECTOR OF URBAN DESIGN



EXPERIENCE

M-Group

Director of Urban Design
2016 – Present

Gensler

Studio Director
2013 – 2015
Shanghai, China

The Office of Tom Ford

Principal
2008 – 2013
Oakland, CA

Design, Community & Environment

Principal
1999 – 2008
Berkeley, CA

Calthorpe Associates

Urban Designer
1994 – 1999
Berkeley, CA

EDUCATION

Master of Architecture University of California
Berkeley, CA

Bachelor of Arts in Dramatic Art

University of California
Davis, CA

LEADERSHIP

Certified Charrette Planner, The National Charrette Institute

Past Member, Caltrans District 4 Pedestrian Advisory Committee

Tom Ford's professional planning career spans more than 20 years, primarily in California. From 2010 through 2015 he lived in Asia and provided planning and urban design services and project management as a consultant to the Asia offices of international design firms. That international planning and urban design work followed many years of experience as a team leader, preparing transit-oriented designs, urban design studies, and comprehensive planning projects for complex sites and programs. Over Tom's two decades of professional practice, he has developed an ability to enter a project, identify potential problems or issues, and develop solutions in a timely manner. Tom's projects are primarily urbanist in their approach and vision. During his career, Tom has received awards on both sides of the Pacific Ocean for his urban design and comprehensive planning work, from various chapters of the American Planning Association to the Hong Kong Chapter of the American Institute of Architects.

AREAS OF EXPERTISE

Urban Design
Community Planning
Design Guidelines
Project Management

URBAN DESIGN

GENERAL PLAN UPDATE | CITY OF SAUSALITO

The City of Sausalito's General Plan Update will refresh the City's 1995 General Plan. Due to the long and storied history of Sausalito's maritime working waterfront, the GPU is an opportunity to address the pending impacts of sea level rise on the established character many parts of the city. Although there are not significant changes to land uses envisioned in the GPU, the process has served as an opportunity for the community to coalesce around a comprehensive vision for its future as well as the shared values that shape that vision and identity. The General Plan is set to be adopted and the EIR certified in the fall of 2020.

EL CAMINO REAL SPECIFIC PLAN | CITY OF SUNNYVALE

The El Camino Real Specific Plan will establish a framework to increase the economic vitality of Sunnyvale's El Camino Real corridor while refocusing land use and circulation patterns to support mixed-use development and enhance pedestrian, bike and transit mobility. The plan will focus future development along the corridor around four "nodes" that are best-suited to carry out the vision of the Grand Boulevard Initiative, a multi-city vision for El Camino Real. The Specific Plan is set to be adopted and the EIR certified in the spring or summer of 2020.

TOM FORD, AICP

DIRECTOR OF URBAN DESIGN

MEMBERSHIPS

Urban Land Institute

American Institute of Certified Planners

PUBLICATIONS

"Base Instincts," *CTBUH Conference Compendium*, October 2015

The Regional City: Planning for the End of Sprawl, by Peter Calthorpe and William Fulton (contributed drawings), 2001

Great Streets, by Allan B. Jacobs (contributed drawings), 1993

PRESENTATIONS

"Perfecting the Public Realm," panelist, *Developing Cities with Small Footprints*, East China Normal University, Shanghai, China, 2015

"Future Development in Shanghai," panelist, *Design and Construction Forum*, American Chamber of Commerce in Shanghai, 2015

"The First 10 Meters," *Sustainability Forum*, United States Consulate, Shenyang, China, 2015

AIRPORT AREA SPECIFIC PLAN AND EIR | SONOMA COUNTY

The Sonoma County Airport Area Specific Plan will build upon the foundation set by the existing Airport Industrial Area Specific Plan to develop an updated plan that supports a balanced land use, urban design and circulation pattern. M-Group is utilizing the community's demographics, employment data, and land use patterns to inform the Specific Plan. Design guidelines will be a crucial piece of the effort to support balanced and land uses, urban design, and circulation around the SMART station. The Specific Plan is set to be adopted and the EIR certified in the fall or winter of 2020.

DESIGN GUIDELINES

OBJECTIVE STANDARDS FOR DOWNTOWN | CITY OF LAFAYETTE

The City of Lafayette is building upon the Downtown Design Guidelines prepared and adopted in 2014 to implement the 2012 Downtown Specific Plan. M-Group has developed a first phase of Objective Standards, which were adopted in May 2019 and support the Design Guidelines in a way that is responsive to ongoing housing legislation at the State level. The standards codify measurable—or objective—development metrics for key development issues that can control the character of the downtown, including, massing, façade variations, public walkways, and onsite opens pace features. A second phase of Objective Standards is in the hearings and adoption process.

SMART GROWTH DESIGN GUIDELINES | SANDAG

The San Diego Association of Governments' (SANDAG) Smart Growth Design Guidelines emphasize the importance of high-quality design in achieving the principles of smart growth. The guidelines serve as an inspiration for developers, designers, local governments and citizens throughout all sizes of communities and neighborhoods in the San Diego region. They also serve as a tool that SANDAG can use to evaluate projects for potential funding through its Smart Growth Incentive Program. San Diego area jurisdictions can draw on the guidelines in part or in whole for their own specific community and as a reference to understand the key principles for creating great places. At a prior firm, Tom served as Project Manager for the *Smart Growth Design Guidelines*.

RESIDENTIAL DESIGN GUIDELINES | TOWN OF HILLSBOROUGH

Located on the San Francisco Peninsula, Hillsborough has a varying topography, extensive native tree species and a significant representation of single-family residences designed by many of California's most illustrious 20th century architects. Hillsborough required a revision and thorough updating of the town's design guidelines for residential development. A key component of the project was to implement rules and standards that allow for new construction and residential remodeling while preserving the sensitive context for residential development in Hillsborough. At a prior firm, Tom Ford served as Project Manager for the *Residential Design Guidelines*.



PAYAL BHAGAT

PRINCIPAL PLANNER

EXPERIENCE

M-Group

Principal Planner
Sep 2019–Present

City of Lafayette

Senior Planner
Jan 2017–Aug 2019
Lafayette, CA

City of Mountain View

Senior Planner
May 2016–Jan 2017
Mountain View, CA

City of Santa Clara

Associate Planner
Nov 2008–May 2016
Santa Clara, CA

City of Fremont

Zoning Technician
Jul 2006–Jul 2008
Fremont, CA

EDUCATION

Master of Urban and Regional Planning

San Jose State University
San Jose, CA

Bachelor of Architecture

Center for Environmental Planning and Technology
Ahmedabad, India

Payal has over 14 years of planning experience with increasingly responsible positions. She has excellent management skills applicable to guiding teams, consultants, and committees, as well as driving projects to be on time and on budget. Her dynamic background in current and long-range planning includes Design Review, Environmental Review, CEQA Documentation, Ordinance Development and Implementation, Zoning Codes, and General Plan Updates. Payal has demonstrated her communication skills and ability to engage an audience as a panel speaker and presenter at California Chapter American Planning Association Conferences.

AREAS OF EXPERTISE

Policy Planning
Development and Architectural Review
Project Management
Community Development
Environmental Review
Community Outreach

PROFESSIONAL EXPERIENCE

PRINCIPAL PLANNER | M-GROUP

City of Walnut Creek - Project Manager for Density Bonus Ordinance Update Project: currently updating the Density Bonus Ordinance consistent with State Law; creating a City specific Supplemental Density Bonus Program; conducting outreach to the development leaders and the community and preparing an appropriate environmental document to support the project. The project is scheduled for the next available joint study session with the Planning Commission and City Council prior to creating the Zoning Code Amendment for final adoption.

City of Saratoga - Review of SB35 Development Project: created a consistency checklist for project compliance with the objective standards provided in the City of Saratoga Municipal Code; authored 30-day non-compliance/incomplete letter; conducted community outreach meeting and created a response to comments received; and created final conditions of approval document for Quito Village Project. The Quito Village Project initiated SB35 Streamlined Process for development of 90 residential units (both for sale and for rent) in 17 buildings with 10 percent of units affordable to very-low income households and 4,999 square feet of commercial use in a separate building.

SENIOR PLANNER | CITY OF LAFAYETTE, CA

Supervised and mentored junior staff. Acted as Staff Liaison to: The Environmental Task Force and Downtown Objective Standards Sub-Committee; Design Review Commission; Planning Commission; and Zoning Administrator. Responsible for recruitment, and management of contract staff and budget, environmental consultant contracts, and code enforcement. Lead Planner on Council initiated zoning code updates to adopt

PAYAL BHAGAT

PRINCIPAL PLANNER

California Building Code revisions, Cannabis and Affordable Housing regulations, and Appeals Ordinance. Lead Planner: to create Objective Design Standards for Multi-family and Multi-family mixed use development in the Downtown; process 200+ rental and for-sale market rate and affordable units in the downtown; redevelopment of a community park; 50,000 square foot Cancer Society Community project in Downtown; single family subdivision; and development of residential property within hillside overlay district.

SENIOR PLANNER | *CITY OF MOUNTAIN VIEW, CA*

Lead Planner/Project Manager of entitlements for 1500 market-rate and affordable housing units and associated infrastructure projects such as pedestrian and bicycle connection. Managed project for creating sustainable district in conjunction with Microsoft, Google and other adjoining companies. Mentored and trained associate, contract, and entry level planners.

ASSOCIATE PLANNER | *CITY OF SANTA CLARA, CA*

Developed and implemented City of Santa Clara's Climate Action Plan which was successful in reducing greenhouse gas emissions by 24%. Served as Liaison to the Architectural Committee and to the City of Cupertino for the development of Apple Campus II project. Project Manager for: development of 2+ million square feet complex office/research and development buildings; housing/apartment projects; senior/affordable housing and mixed use (250,000+ square foot commercial/5000+ housing units) projects; a 150+ room hotel; review of restoration/rehabilitation of historic structures; focus area plans; CIP projects such as International Swim Center, Silicon Valley Power office building; bike trail/sidewalk enhancement projects; and 49ers Stadium make-ready project. Lead planner for Data Center projects within Santa Clara, responsible for 23+ projects totaling more than 2Million+ square feet of industrial space. Served on the Technical Advisory Committee for the High Speed Rail project and Caltrain Electrification project. Conducted Fiscal analysis of the City of Santa Clara General Plan Land Use Policies. Recruited, trained, and managed interns, consultants, and a city project budget of over \$1.5 Million.

ZONING TECHNICIAN | *CITY OF FREMONT, CA*

Project Manager for development projects including new single family and multifamily housing; industrial buildings; conditional use permits; review of modifications to historic structures; and site inspections. Optimized permit processing for various entitlements and business signage resulting in 20% reduction in time. Organized permit center, permit streamlining, and counter staff training.

JUSTIN SHIU, AICP

SENIOR PLANNER



EXPERIENCE

M-Group

Senior Planner
2019 – Present

M-Group

Associate Planner
2015 – 2019

M-Group

Assistant Planner
2013 – 2015

EDUCATION

Master of City and Regional Planning & Master of Science in Engineering, for Transportation Planning
California Polytechnic State University
San Luis Obispo, CA

Bachelor of Arts in Urban Studies
University of California, Berkeley
Berkeley, CA

MEMBERSHIPS

American Institute of Certified Planners (AICP)
American Planning Association (APA)

Justin has experience working for cities in current and long-range planning. His work in current planning has included design review and permit processing for Bay Area cities. He has contributed to long-range planning in projects ranging from municipal code amendments to General Plan update projects, including Housing Elements. Justin brings together his technical knowledge and his analytical skills to provide comprehensive support to local planning.

AREAS OF EXPERTISE

Development and Design Review
General Plan Updates
Policy Planning
Mapping and Graphic Design

PROFESSIONAL EXPERIENCE

ADU ORDINANCE UPDATE | VARIOUS CITIES

Worked with the City of San Rafael on an update to the City's accessory dwelling unit ordinance to bring it into compliance with State law. Recommended interim measures for new applications while the ordinance is being updated and prepared handouts explaining regulations. Collaborated with Town of Moraga staff to draft updates to the ADU ordinance to bring it into compliance with State law.

EL CAMINO REAL CORRIDOR SPECIFIC PLAN | CITY OF SUNNYVALE, CA

Engaged in research, land use planning, and workshop preparation to develop a vision for land uses and multimodal circulation along the El Camino Real corridor in Sunnyvale. Contributed in the assessment of existing conditions, development of outreach material, drafting of the vision and principles, preparation of conceptual land use alternatives, and evaluation of development potential. Prepared outreach materials, compiled meeting summaries, and maintained an up-to-date project website.

GENERAL PLAN 10 YEAR STATUS REPORT AND AMENDMENT | CITY OF SAN RAFAEL, CA

Compiled a 10-year status report on program accomplishments for the 16 Elements of the San Rafael General Plan. Prepared amendments to the General Plan based on the status report and in conjunction with City staff. Drafted a General Plan EIR Addendum.

2015-2023 HOUSING ELEMENT UPDATE | VARIOUS CITIES

Assisted cities in obtaining HCD certification for their Housing Elements through the streamlined update process. Conducted the housing needs assessments for cities in Sonoma, Marin, San Mateo, and Santa Clara counties to understand the housing need of jurisdictions for the 2015 -2023 planning period. Collaborated on updates to the constraints, resources, site inventory and programs sections of the Housing Element. Prepared draft documents for HCD streamlined review. Helped finalize Housing Elements and prepare them for Planning Commission and City Council hearings.

JUSTIN SHIU, AICP

SENIOR PLANNER

ENVIRONMENTAL REVIEW

INITIAL STUDIES/(MITIGATED) NEGATIVE DECLARATIONS | *VARIOUS CITIES*

Assisted in the preparation of initial studies/ (mitigated) negative declarations for study areas in various Bay Area cities. Collaborated on drafting sections for the evaluation of environmental impacts. Prepared exhibits showing land uses, natural resources, and impacts used in environmental documents of various projects.

SAN PABLO AVENUE RESIDENTIAL DEVELOPMENT INITIAL STUDY/MND | *CITY OF EL CERRITO*

Assisted in the preparation of Initial Studies to demonstrate compliance with the San Pablo Avenue Specific Plan EIR for residential developments proposed on three sites.

TEC PLAN INITIAL STUDY/MND | *CITY OF BENICIA*

Assisted in the preparation of an Initial Study/ Mitigated Negative Declaration for the Transportation and Employment Center Plan Area in Benicia. Drafted the evaluation of environmental impacts on agriculture, air quality, geology, greenhouse gas emissions, hazardous materials, hydrology, land use, noise, population and housing, public services, recreation, transportation, and utilities.

DENSITY BONUS ORDINANCE INITIAL STUDY/ND | *CITY OF WALNUT CREEK*

Preparing an initial study/negative declaration for updates to the City's density bonus ordinance.

HARMONY LOT 3 EIR ADDENDUM | *CITY OF PACIFICCA*

Preparing an EIR addendum for the development of a single family residence on a vacant lot. The property is part of a subdivision covered by an EIR.

STAFFING SOLUTIONS

CURRENT PLANNING SERVICES | *CITY OF PINOLE, CA*

Reviewed development and use permit applications, worked with applicants and consultants on assembling a complete application, prepared public hearing materials, and presented entitlement requests and appeals for consideration at Planning Commission and City Council hearings. Managed the scheduling of advisory committee meetings and public hearings. Maintained ongoing current planning functions and helped preserve continuity during the transition between Planning Managers.

CURRENT PLANNING SERVICES | *CITY OF SOUTH SAN FRANCISCO, CA*

Reviewed applications for new multifamily units, hotels, commercial buildings, and industrial buildings. Worked with applicants to prepare projects for Planning Commission and City Council review. Coordinated with environmental consultants on preparation of initial studies and environmental consistency analyses. Provided planning counter assistance and conducted plan checks. Managed all applications for new small cell wireless facilities submitted to the Planning Division and any related tasks outside of the plan review, such as interdepartmental communications, examination of alternatives with applicants, response to public comments, and handling of appeal requests.

bae urban economics

Matt Kowta, MCP, Principal in Charge

Managing Principal



Professional Experience

For the past 29 years, Matt has pioneered innovative techniques in economic analysis to meet the challenges of contemporary urban development. Matt oversees BAE operations spanning all five 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. Matt has directed preparation of full Housing Element Updates and Housing Element Needs Assessments and for a diverse range of California communities, ranging from urban locations, such as Vallejo, to rural areas, such as Yolo and Butte Counties. His Housing Element work also includes Napa County for the past three update cycles, St. Helena, Truckee, Windsor and Davis. Matt will be overseeing BAE's work on the Mountain View Housing Element Update.

Matt recently served as BAE's principal-in-charge for major affordable and workforce housing studies in the Lake Tahoe region, including the Truckee North Tahoe Regional Housing Needs Study and the Placer County Housing Strategy and Development Plan. Matt is currently leading assisting Palm Beach County, Florida with a workforce housing program, an inclusionary housing policy for the City of Napa and a Housing Strategy for the City of Sunnyvale.

Education

Master of City Planning, UC Berkeley

Bachelor of Arts, Geography, UCLA

Housing Element Updates (3 cycles)

County of Napa, California
Housing Needs Analysis,
Housing Policy
Development

Workforce Housing Needs Assessment

Town of Truckee,
California
Housing Needs Analysis,
Best Practices, Strategy
Development

Assured Housing Feasibility Study

City of Moab and Grand
County, Utah
Housing Feasibility
Analysis, Workforce and
Affordable Housing, Policy
Development

Workforce Housing Policy Feasibility

Palm Beach County,
Florida
Housing Needs Analysis,
Development Feasibility
Analysis, Policy
Development

Affordable Housing Nexus Analysis

City of Bloomington,
Minnesota
Housing Needs Analysis,
Development Feasibility,
Affordable and
Inclusionary Housing
Policy Development



page left blank

Stephanie Hagar, MCP, Project Manager
Associate Principal



Education

Master of City Planning,
UC Berkeley

Bachelor of Art,
Psychology, UC San
Diego

Professional Experience

Stephanie provides strong leadership and project management to BAE engagements throughout the western US. She has extensive experience with workforce and affordable housing studies, along with deep expertise in financial feasibility, fiscal impact, economic impact, and market studies.

Stephanie has completed numerous workforce and affordable housing strategies, needs assessments, and policy studies. 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 she recently served as project manager for the preparation of a Housing Strategy for the City of Sunnyvale. 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 will be serving as BAE's project manager for the Mountain View Housing Element Update.

Stephanie also offers expertise in fiscal impact analysis for a wide range of land uses. She has led and supported fiscal analyses for numerous major plans and projects in Menlo Park, including two separate expansions of the Facebook headquarters campus, the City's General Plan Update, and the City's Housing Element Update. Her other fiscal impact analyses include evaluations of proposed projects and plans in East Palo Alto, Foster City, Vallejo, South San Francisco, San Jose, and San Rafael.

**Housing Element Update
Fiscal Impact Analysis**

City of Menlo Park
Fiscal Impact Analysis

Housing Element Update

City of Concord
Housing Needs Analysis,
Housing Policy
Development

Housing Element Update

City of Milpitas
Housing Needs Analysis,
Site Inventory, Housing
Policy Development

**Housing Element Update
(in progress)**

City of Davis
Housing Needs Analysis,
Site Inventory, Housing
Policy Development

**Affordable Housing
Strategy**

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

**Fiscal and Housing
Needs Impact Analyses
(multiple projects)**

City of East Palo Alto
Housing Needs
Assessment; Fiscal Impact
Analysis



page left blank

Chelsea Guerrero, MCP
Senior Associate



Professional Experience

Chelsea brings a strong background in housing and economic development to BAE. She is familiar with econometric statistical modeling and specializes in detailed analysis for public policy planning.

Chelsea provides market, feasibility, and fiscal impact analyses for BAE projects throughout California. She has extensive experience preparing market, feasibility, and fiscal impact analyses to inform long-range planning decisions and the evaluation of proposed development projects in the Bay Area. She has worked on market and feasibility studies in the cities of Milpitas, San Jose, Sunnyvale, Menlo Park, and San Ramon. Her housing policy work has included financial feasibility testing of potential inclusionary housing policy options in the cities of Menlo Park and Napa and the assessment of workforce housing needs for the Golden Gate National Recreation Area. Her fiscal impact analysis work has included evaluations of development projects in Menlo Park, East Palo Alto, San Bruno, and Long Beach. She has also prepared fiscal impact analyses to evaluate the impacts of proposed land use changes in Milpitas, Vallejo, Gilroy, Napa, and San Ramon.

Prior to joining BAE, Chelsea worked at the Metropolitan Transportation Commission (MTC) on its Regional Prosperity Plan, a three-year regional planning initiative funded by the U.S. Department of Housing and Urban Development (HUD).

Education

Master of City and Regional Planning, UC Berkeley

Bachelor of Arts, Political Economy and Geography, UC Berkeley

Facebook Campus Expansion Fiscal Analysis

City of Menlo Park
Fiscal Impact Analysis for Tech Office Expansion

Fiscal Impact Analyses (multiple projects)

City of East Palo Alto
Fiscal Impact Analysis

Golden Gate National Recreation Area Employee Housing Needs Study

National Park Service
Workforce Housing Needs Analysis

Inclusionary Housing Feasibility Analysis

City of Menlo Park
Inclusionary Housing Financial Feasibility Analysis

VTA Development Advisory Services

Santa Clara Valley Transportation Authority
Market Analysis, Development Feasibility Analysis, Highest and Best Use Analysis, and Developer Solicitations

Nasa Research Park Real Estate Advisory Services

Moffett Field, California
Market Analysis and Lease Negotiations Support



page left blank

Miki Kobayashi
Senior Analyst



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

**Role for Proposed
Scope of Services**
Research Support

Professional Experience

Miki Kobayashi provides high quality research and analytical support for BAE's full range of consulting assignments.

Miki's recent experience includes data collection and analysis for a series of General Plan Updates, including for Contra Costa County, Glenn County, and the City of Sacramento, as well as a Real Estate Master Plan Update in Alameda County. This work included collection of demographic and economic data through primary and secondary research techniques, and analysis of housing sales data and trends. Miki also contributed GIS-based analysis for the Placer County Housing Strategy and Development Plan and for economic evaluation of master plan changes for a mixed-use village in Truckee. Additionally, she recently helped with an affordable housing market study for Abode Communities. Currently, she is providing research assistance for the preparation of the City of Stockton Consolidated Plan and Analysis of Impediments to Fair Housing Choice and the Vacaville Affordable Housing and Anti-Displacement Strategy.

Prior to joining BAE, Miki interned with the Yolo County Transportation District, where she analyzed ridership trends. Additionally, she interned at Morgan Stanley and Majerko Investment Management, where she conducted financial analyses and market research. Miki is currently studying for a Masters in City and Regional Planning at UC

**Affordable Housing
Strategy and
Development Plan**

Placer County, California
Housing Feasibility
Analysis, Workforce and
Affordable Housing, Policy
Development

General Plan Update

City of Sacramento,
California
Market Analysis,
Demand Projections,
Policy Development

General Plan Update

Glenn County, California
Market Analysis,
Demand Projections,
Policy Development

General Plan Update

Town of Truckee,
California
Market Analysis,
Demand Projections,
Policy Development

**Consolidated Plan and
Analysis of Impediments**

City of Stockton,
California
Housing Needs
Assessment,
Fair Housing Data
Collection and Analysis

Vacaville Downtown Plan

City of Vacaville,
California
Market Analysis, Housing
Needs, Demand
Projections,
Policy Development



page left blank



Hillary Gitelman

Project Director

EDUCATION

M.S., Historic Preservation, Columbia University, School of Architecture, Planning & Preservation, New York, NY

B.A., History of Art, Yale University, New Haven, CT

25+ YEARS' EXPERIENCE

PROFESSIONAL AFFILIATIONS

American Planning Association

San Francisco Planning and Urban Research Association

Bay Area Planning Directors Association (Steering Committee)

California Preservation Foundation

Lambda Alpha International

HONORS

Cal APA 2018 Hard-Won Victories Award, Palo Alto Comprehensive Plan Update

APA 2004 Outstanding Planning Award & National Association of Environmental Professionals 2003 Presidents Award for the Presidio Trust Management Plan

San Francisco Mayor's Fiscal Advisory Committee 1998 SPUR Award for Managerial Excellence

Hillary leads ESA's Bay Area Environmental Planning group and has over 25 years of experience in planning and environmental review with variety of Bay Area agencies and organizations. Early in her career, Hillary served as the Environmental Review Officer for the City and County of San Francisco, working on CEQA review of large projects in San Francisco such as Mission Bay, AT&T Park, the Third Street Light Rail, and more. She also served as planning director of the Presidio Trust, where she led the planning and NEPA process associated with the Presidio Trust's Management Plan, which still serves as the Trust's "general plan." Hillary's public agency experience also included planning director positions in Napa County and the City of Palo Alto, where she led the process to update each agency's general plan and conduct the associated CEQA review. She brings a depth of experience in policy planning, development and infrastructure project review, and CEQA/NEPA compliance. Her projects have included new general plans, planning and zoning changes to stimulate multifamily housing, as well as environmental review of major transportation and development projects. She has demonstrated the ability to advance constructive change even in slow growth communities, and has experience working in rural, suburban, and urban contexts.

Relevant Experience

Project Director, EIR Preparation for Local Lead Agencies. Since joining ESA, Hillary has supported project managers responsible preparing Environmental Impact Reports (EIRs) in compliance with CEQA. Hillary offers strategic support, digging into project coordination and required analyses as needed. Her ongoing or completed projects include a quarry expansion in Mendocino County, a new ballpark in Oakland, a housing inventory for Napa County, and a large mixed use development for a confidential client in San Jose. For all of these projects, Hillary collaborates with accomplished project managers and a deep bench of in-house technical experts in the fields of cultural resources, biology, hydrology, air quality and noise, and more.

Harris Quarry, Revised Draft and Final EIR, Mendocino County, CA. *Project Director.* Hillary supported Luke Evans, project manager, in preparing a revised Draft EIR and Final EIR, responding to a court decision that invalidated portions of a prior document that was prepared by another firm. The work required strict adherence to the principle of *res judicata*, as well as an in depth examination of potential changes in circumstances since the prior analysis.

Oakland Waterfront Ballpark District Project EIR, Oakland, CA. *Project Director.* Hillary supported Crescentia Brown, project manager, in preparing a Draft EIR analyzing the Oakland A's proposal for a new ballpark and mixed use development on the waterfront in downtown Oakland. With the City of Oakland acting as CEQA lead agency, Hillary and her team prepared the Draft EIR that was released for public review in the spring of 2020.

City of Palo Alto, Director of Planning & Community Environment, Palo Alto, CA. In her role as Director, Hillary served a city of approximately 65,000 residents with a daytime population of over 150,000 in the heart of Silicon Valley. She reported to the City Manager and oversaw a staff of 40+ responsible for current and long range planning, transportation, and code enforcement. Her projects included preparation and CEQA review of the 2014-2023 Housing Element update, an updated general plan, zoning ordinances, project reviews in employment districts such as the Stanford Research Park, and a variety of transportation initiatives mostly focused on traffic safety, trip reduction, and pedestrian/bicycle improvements.

Napa County, Director of Planning, Napa, CA. Hillary directed the Department of Planning, Building & Environmental Services with a staff of 70 and a budget of over \$8 Million, overseeing current and long-range planning, watershed conservation, parks, building permit and code enforcement activities, environmental health/consumer protection, engineering, and storm water pollution prevention programs. She reported to the elected Board of Supervisors and the County CEO. Major projects included preparation and CEQA review of the 2007-2014 Housing Element Update, a general plan update, and planning for a new neighborhood on the Napa Pipe brownfield site abutting the Napa River and the City of Napa, which was critical for the County's housing inventory in its 2014-2023 Housing Element.

Presidio Trust, Director of Planning, San Francisco, CA. Hillary directed the planning department of the Presidio Trust, a federal agency established to preserve the Presidio of San Francisco for public use while making the former U.S. Army post financially self-sufficient. She reported to the Executive Director and supervised a staff of 25 planners, landscape architects, transportation engineers, preservation specialists, ecologists, archaeologists, and others; responsible for an overall annual budget of \$3 Million. Hillary was responsible for award winning *Presidio Trust Management Plan* adopted in August 2002; also responsible for NEPA/Section 106 compliance, and other plans and projects in support of resource preservation, leasing and development activities.

City of San Francisco, Environmental Review Officer, San Francisco, CA. In this role, Hillary was responsible for the City and County of San Francisco's compliance with the California Environmental Quality Act (CEQA) and related laws. She supervised a staff of 15 people who prepared and reviewed Environmental Impact Reports, negative declarations, and other environmental documents for compliance with CEQA, NEPA, and related statutes. Ultimately, she was responsible for the content of hundreds of environmental documents prepared each year, and for successfully integrating the environmental review function with other Planning Department functions. Major projects included replacement of the Mid-Embarcadero Freeway, Mission Bay Redevelopment, the Third Street Light Rail Project, the Proposed SFO Runway expansion (never completed), and ATT Park.



Luke Evans

Project Manager

EDUCATION

M.S., Environmental Policy and Natural Resource Management, University of Arizona, Tucson, 2002

B.A., History and Religious Studies, University of Arizona, Tucson, 1992

20 YEARS' EXPERIENCE

Luke Evans has developed a reputation throughout his 20-year career for being able to successfully manage a wide range of project types, and his multi-disciplinary training allows him to work within a broad range of environmental fields. He has managed environmental document preparation for large-scale residential, commercial, and industrial projects in urban and rural settings, general plans, specific plans, light rail transportation networks, and affordable housing projects. Luke recently oversaw the successful certification of the EIR for the City of Eureka's General Plan. He is currently managing the preparation of an EIR in Sacramento County for the Grandpark Specific Plan, a project that will eventually provide up to 22,000 new residential units, millions of square feet of regional and neighbourhood commercial uses, and a regional hospital. In more urban settings, Luke has successfully managed projects in San Francisco, Alameda, and Sacramento that have allowed approval of thousands of new residential units.

Relevant Experience

City of Eureka, General Plan Program EIR, Humboldt County, CA.

Project Manager. Luke served as project manager for preparation of a program EIR for the City's 2040 General Plan Update. The City's General Plan had not been comprehensively updated since 1997, and the City was looking towards providing for greater densification of commercial and residential uses in its historic core and also along its working waterfront. Important issues in the EIR centred on historic resources, traffic and transportation, Coastal Zone issues, and general land use issues. The EIR was certified and the General Plan Update was adopted in October, 2018.

City of Alameda, Alameda Marina Master Plan EIR, Alameda County, CA.

Project Manager. Luke led the EIR effort for the controversial redevelopment of the 44-acre Alameda Marina property on the Oakland Estuary. The comprehensively redeveloped property will include a mix of 779 new housing units, 150,000 square feet of retail and office uses, 550 boat slips, and 4.5 acres of public open space. A significant component of the project included the complete revitalization of the existing dock and shoreline infrastructure. Issues of concern for the project included transportation, historic architectural resources, and aquatic resources.

County of Humboldt, County General Plan Update, Humboldt County, CA.

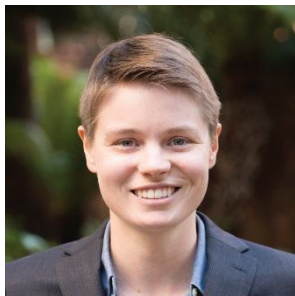
Project Manager. Luke served as project manager for preparation of

the air quality, climate change, noise, and transportation sections of the General Plan EIR. The General Plan Update had been under development for more than 15 years, and had been the subject of challenges and controversy. The County required specific expertise to prepare the highly technical air quality, climate change, noise, and transportation sections. Issues unique to the project included projecting an interim “worst-case” impact scenario for the Year 2028 rather than the planning horizon year of 2040. This was due to projected population declines after 2028. The EIR was certified and the General Plan was adopted in October, 2017.

City and County of San Francisco, Mayor’s Office of Housing and Community Development, San Francisco, CA. *Project Director.* For the last five years, Luke has overseen ESA’s on-call contract with the San Francisco Mayor’s Office of Housing for NEPA compliance for residential projects receiving U.S. Department of Housing and Urban Development (HUD) grants and associated funding. In this capacity, Luke has overseen multi-disciplinary teams evaluating proposed housing projects on Treasure Island, and in the Mission District, Mission Bay, the Tenderloin, Bayview, and South of Market neighborhoods. Issues typically associated with these types of high-density infill projects include historic resources, environmental justice, hazardous materials, visual resources, and transportation. Under Luke’s leadership, more than a half-dozen NEPA documents have been successfully prepared for projects that total more than 2,000 new residential units in the City.

County of Sacramento, Grandpark Specific Plan Program EIR, Sacramento County, CA. *Project Manager.* Luke is currently serving as project manager for preparation of a program EIR for a 5,600-acre mixed use project in unincorporated Sacramento County. The Specific Plan envisions the construction of ±22,000 residential units, ±400 acres of commercial uses, and ±2,000 acres of parks and open space. Issues of concern include transportation and traffic, drainage, consistency with an existing Habitat Conservation Plan, nearby Sacramento international Airport operations, and conversion of agricultural land.

Sacramento Regional Housing Authority/Sacramento Regional Transit District, Twin Rivers Transit-Oriented Development and Dos Rios Light Rail Station Project, Sacramento County, CA. *Project Manager.* Luke successfully led a complex environmental compliance effort for a combined NEPA/CEQA document that evaluated the effects of a rehabilitated and expanded affordable housing project and construction and operation of RT’s proposed Dos Rios light rail station north of downtown Sacramento. HUD was the federal lead agency, and the City of Sacramento and RT served as cooperating local lead agencies. The Federal Transit Administration also used the combined NEPA/CEQA document to prepare its own findings for the light rail station. The project is currently under construction.



Jill Feyk-Miney

Deputy Project Manager

Jill is an accomplished understanding and environmental principles. NEPA documentation, and wetland and expertise leads to capability. Jill's broad her to work on a variety and infrastructure

EDUCATION

M.S., Environmental Studies, California State University, Fullerton

B.S., Environmental Studies, University of California, Santa Barbara

5 YEARS EXPERIENCE

PROFESSIONAL AFFILIATIONS

Association of Environmental Professionals

American Planning Association

TRAINING

Wetland Training Institute, Wetland Delineation

South Coast Air Quality Management District, 2016 CalEEMod Software

With her master's degree in Environmental Studies, professional who provides a well-rounded approach to the practical application of She has experience writing all levels of CEQA and while specializing in air quality modeling/analysis, jurisdictional delineations. Her in-depth technical cohesive document production and peer-review planning and environmental knowledge has allowed of residential, commercial, industrial, transportation, projects.

Relevant Experience

Alameda Marina Master Plan EIR, Alameda, CA.

Project Analyst. Jill assisted in the EIR effort for the redevelopment of the 44-acre Alameda Marina property on the Oakland Estuary by preparing sections of the EIR including Geology and Soils, and Hazards and Hazardous Materials. The comprehensively redeveloped property will include a mix of 779 new housing units, 150,000 square feet of retail and office uses, 550 boat slips, and 4.5 acres of public open space, including a new segment of the San Francisco Bay Trail. A significant component of the project will include the complete revitalization of the existing dock and shoreline infrastructure. Issues of concern for the project include transportation, aquatic resources, and historic architectural resources.

The Residences at Shoreline Gateway, Mountain View, CA.

Deputy Project Manager. Jill is assisting with the preparation of an EIR for the development of 203 apartment units and 100 condominium units in two buildings. The Project also includes construction of an above ground parking structure for an existing office building on the site. Jill is preparing many sections of the document, and conducting the air quality and greenhouse gas analysis.

Fruitvale Transit Village Phase IIB, Oakland, CA.

Project Manager. Jill is prepared a CEQA Compliance Memorandum with the 2010 Fruitvale Transit Village Project EIR, and a NEPA Re-Evaluation of the 2011 Environmental Assessment prepared for the Fruitvale Transit Village affordable housing project for the

purposes of Phase IIB development. Jill is also managed the contracting and budgeting, and was the primary point of contact for the client.

City of Redwood City, Harbor View Project EIR, Redwood City, CA. *Deputy Project Manager.* Jill, Deputy Project Manager, is coordinating the Harbor View Project EIR in the City of Redwood City. The Project involves the construction of an approximately 1.3-msf office campus, and includes a dedicated amenities building, two parking garages, and a robust transportation demand program. ESA had previously prepared a Draft EIR for the Redwood City Inner Harbor Specific Plan for 100 acres along US 101 and Redwood Creek including the Harbor View Project site, but the City ultimately elected to not proceed with the Specific Plan. Jill prepared the Air Quality, Greenhouse Gas Emissions and Energy, Geology and Soils, and Hazards and Hazardous Materials chapters of the EIR.

Quarry Residential Project, Richmond, CA. *Deputy Project Manager.* Jill assisted with the preparation of an EIR for the Quarry Residential Project which would develop approximately 60 attached townhomes and 216 multifamily condominium flats on an 18.4-acre site in the Point Richmond neighborhood of the City of Richmond. Jill prepared many sections of the document including: the project description, air quality, greenhouse gas, population and housing, utilities, hydrology, and public services and recreation. Jill is also prepared a standalone energy section that quantifies the construction and operational (including transportation fuel use) energy use.

Bayview Estates Residential Project, Contra Costa County, CA. *Deputy Project Manager.* Jill is assisting with the preparation of an EIR for a proposed residential development of an undeveloped, 30-acre site in the Vine Hill/Pacheco Boulevard area of unincorporated Contra Costa County. Jill is conducting an assessment of wetlands impacts based on a field survey and comparison to a previously completed wetland delineation, conducting peer review of the Biological Resources CEQA analysis, and acting as deputy project manager for the EIR.

1750 Broadway, Oakland, CA. *Deputy Project Manager.* The 1750 Broadway Project would demolish an existing structure on the parcel and would construct a 38-story building containing approximately 307 residential units, 5,000 square feet of ground-level retail, and 212 vehicle parking stalls on six above-ground levels. Jill provided analysis for the Project to qualify under the Class 32 CEQA Categorical Exemption for In-fill Development Projects.

412 Madison Street, Oakland, CA. *Deputy Project Manager.* Jill assisted in the preparation of a CEQA checklist in support of using CEQA streamlining and/or tiering provisions for the Project. The Project would develop a seven-story, mixed-use residential building with approximately 157 apartment units, 91 garage parking spaces, and 1,269 square feet of ground floor commercial use.

2424 Webster Street, Oakland, CA. *Environmental Analyst.* Jill prepared a CEQA Checklist/Exemption Report and provided environmental analysis in support of an Addendum to the Broadway Valdez District Specific Plan EIR. The Project would develop a 6-story, 75-foot-tall (including roof parapet) building with approximately 75,000 square feet of office space, 15,000 square feet of retail space, and 90 parking spaces below grade on Webster Street.

Gary K. Black, AICP, President**Education**

Master of City Planning in Urban Transportation, University of California at Berkeley

Bachelor of Arts in Geography, University of California at Los Angeles

Professional Associations

American Institute of Certified Planners

Institute of Transportation Engineers

**Experience**

Since 1982, Mr. Black has directed a number of transportation planning, traffic engineering, parking, and transit studies. He has prepared transportation plans for the Cities of San Jose, Palo Alto, San Mateo, Gilroy, and San Carlos, and areawide plans for reuse of the Bay Meadows racetrack site in San Mateo, Moffett Park in Sunnyvale, and many parts of San Jose (North San Jose, Downtown, Edenvale, and Evergreen). He has prepared traffic studies for new development in most cities within the Bay Area. He also has prepared numerous parking studies, including downtown parking studies for San Carlos, San Mateo, Gilroy, and San Jose.

Representative Projects**• Areawide Transportation Plans:**

Circulation Elements for General Plans in San Mateo, Sunnyvale, Cupertino, Gilroy, and Palo Alto.

Bay Meadows – Hexagon prepared the transportation plan for redevelopment of the Bay Meadows Race Track in San Mateo into a mixed-use, transit orientated development.

Sunnyvale – Hexagon prepared specific plans for the Peery Park, Lawrence Station, Moffett Park, and El Camino Real areas of Sunnyvale. The plans were developed to support increased density of development, more diverse land uses, and buildout of the bicycle and pedestrian networks. The studies included travel demand model forecasts and estimates of vehicle miles traveled.

North San Jose – Hexagon developed a revised development policy for North San Jose that included a long-range forecast of traffic conditions and development of a long list of necessary transportation improvements – both roads and transit. The policy resulted in the adoption of an impact fee to fund transportation improvements.

Santa Clara – Hexagon has done transportation planning for two specific plan areas. These were developed to support housing development in industrial areas to create a better jobs-housing balance. The studies were completed with travel demand models and calculated the change in vehicle miles traveled.

• Campus Studies:

Foothill College –The campus is served by one ring road that is accessed through a single intersection. Hexagon staff recommended that the ring road be made one-way. Other recommendations were also made for better signage and lighting around the ring road.

City College – Hexagon staff was hired to measure parking demand and to determine the amount of new parking needed. Hexagon staff conducted parking occupancy surveys. Student parking in neighborhoods was estimated by comparing overnight occupancy to occupancy at typical student peak times.

Evergreen Valley College - Hexagon was hired to assess the impact of expansion of the campus. One issue was reducing vehicle miles traveled since the campus is located on the edge of the city.



- **Site Traffic Analyses:**

For offices, hotels, restaurants, residential subdivisions, apartments, schools, warehouses, industrial complexes, distribution centers, and mixed-use developments in San Jose, Santa Clara, Sunnyvale, Milpitas, Los Gatos, Fremont, Monterey, Palo Alto, Menlo Park, Redwood City, San Carlos, San Mateo, Los Altos, Santa Rosa, Napa, Hayward, Bakersfield, Richmond, Danville, Concord, and Cupertino, California. These included estimation of future trip generation, impacts on adjacent intersections, and site-specific pedestrian and auto circulation issues such as driveway and crosswalk locations.



- **Impact Fee Studies:**

Mr. Black has directed numerous transportation impact fee studies. The purpose of the studies is to identify future transportation deficiencies, improvements to address the deficiencies, and costs to implement the improvements. Impact fee studies were completed for San Mateo, Palo Alto, Sunnyvale, San Jose, Santa Clara, and Gilroy.



- **Parking Studies:**

San Carlos – Staff believed that the available parking spaces were utilized to such an extent that any future development could not be accommodated. It was determined that future development could be accommodated only by planning a parking structure. A suitable site was identified, and a three-level parking structure was designed (one level underground and two levels above). To help the financial feasibility of the parking structure, it was designed to have two levels of housing above.

San Mateo – Due to recent and projected growth, many downtown merchants believed that more parking facilities were needed. Surveys revealed that the existing parking situation was adequate, although during peak times customers sometimes had to settle for less desirable spaces because the prime spaces were taken by employees. The study was able to show that a relatively modest increase in downtown parking meter rates combined with a small property assessment could finance an additional parking structure.



- **Major Developments:**


Valley Fair – Valley Fair is a 1.2 million square foot regional mall that was proposed for enlargement by approximately 300,000 square feet.

Santana Row – This project transformed a 1960's era shopping center into a mixed-use "Main Street" style shopping, entertainment and residential center.

Oakridge Mall – The proposed expansion consisted of the addition of 85,000 square feet of movie theater space plus additional retail and restaurant space.

Evergreen Specific Plan - The plan called for the construction of over 4,000 dwelling units on about 600 acres. Hexagon staff analyzed both on-site and off-site traffic impacts of the plan and developed the circulation element of the EIR.

Facebook Willow Village – The Willow Village plan included over one million square feet of new office space for Facebook plus residential, retail, and hotel development. Hexagon completed the transportation study for the plan including calculation of VMT effects and the design of access and on-site circulation.



Ollie Zhou, T.E., Vice President & Principal Associate

Education

Bachelor of Science – Civil & Environmental Engineering, University of California – Berkeley

Professional Associations

Member of the Institute of Transportation Engineers

Registered Professional Traffic Engineer in the State of California (TR 2857)



Experience

Since January 2014, Mr. Zhou has participated in a variety of traffic engineering and transportation planning projects for both the public and private sectors throughout the greater San Francisco Bay Area. These projects include travel demand model validation and application for general plan updates and area plans, traffic impact studies, site traffic analyses, parking studies, and multi-modal roadway segment analysis.

Mr. Zhou has been primarily involved in utilizing the CUBE travel demand forecasting software package for travel demand model applications, as well as TRAFFIX, Synchro and SimTraffic software and Highway Capacity Manual (HCM) methodology to evaluate intersection operations and analyzing project impacts. Mr. Zhou is proficient with ArcGIS, Excel, and Word.

Representative Projects

• Travel Demand Forecasting Model Development and Application Projects:

- **Sunnyvale Citywide Model – Sunnyvale, CA.** – Model refinement and validation. Model application for the Sunnyvale General Plan Update, Lawrence Station Area Plan, Peery Park Specific Plan, and Sunnyvale Traffic Impact Fee.
- **San Mateo Citywide Model – San Mateo, CA.** – Model development, refinement and validation. Model application for the San Mateo Traffic Impact Fee.
- **10th St and 11th St two-way street conversion – San Jose, CA** – Local model validation and forecasting link-level and intersection-level volumes.
- **Castro Street closure alternatives at Central Expressway – Mountain View, CA** – Analyzed local traffic rerouting patterns for three Castro Street Closure alternatives.
- **Gilroy Downtown Specific Plan with High Speed Rail (HSR) Station – Gilroy, CA** – Incorporated boarding-alighting data provided by HSR Authority at Gilroy Caltrain Station into the Gilroy Citywide Model to analyze three downtown specific plan alternatives.

• Over 40 Traffic Analyses/Traffic Feasibility Studies for area-wide plans, offices, hotels, apartments, schools, daycare centers and multiple-use developments throughout the Bay Area. Representative projects include:

- **Sunnyvale General Plan Update** – Sunnyvale, CA
- **Lawrence Station Area Plan** – Sunnyvale, CA
- **Peery Park Specific Plan** – Sunnyvale, CA
- **Franklin Templeton Campus Expansion Traffic Study** – San Mateo, CA
- **Belmont-Redwood Shores School District 6 School Expansions** – Belmont, CA

• Traffic Simulation/Signal Coordination Studies for the Albright Office project in Los Gatos, CA. Developed initial signal timing plans using Synchro/SimTraffic software for five intersections along Winchester Blvd and Lark Ave. Subsequently optimized signal timing plans at 50% occupancy of the Albright Office development project.

• Traffic Impact Fee (TIF) Update Studies for the City of San Mateo and the City of Sunnyvale. Conducted nexus studies and calculated appropriate impact fees for the TIF Update projects.

• Multi-Modal Analysis for the Palo Alto General Plan Update in Palo Alto, CA. This study included analyzing the existing and future roadway segment level-of-service for all of automobile mode,

pedestrian mode, bicycle mode, and transit mode. This study followed the multi-modal analysis guidelines outlined in the *Highway Capacity Manual (HCM), 2010 Edition*.

- **Bicycle Level of Service Analysis** for the Magee Ranch project in Danville, CA. This study utilized the bicycle level of service methodology for two-lane highway segments outlined in the *Highway Capacity Manual (HCM), 2010 Edition*.
- **Peer Review** for the Santa Clara City Place Traffic Impact Analysis, Internal Traffic Impact Analysis, transportation section of the draft EIR, and Mitigation Phasing Strategy.
- **Transportation Demand Management (TDM) Plans** for Wheeler Plaza redevelopment and residential development at 560 El Camino Real, both in San Carlos, CA and for Lam Research expansion in Fremont, CA.
- **Site Access and Circulation Studies** for the SCU Franklin Street Closure Study in Santa Clara, CA, Stanford Villas Apartments in Palo Alto, CA, Lincoln Center Campus in Foster City, CA and Irvine Company Campus Traffic Operations Study in Sunnyvale, CA.
- **Parking Studies** for the El Camino Hospital in Mountain View, CA, the Carolan Avenue Apartments in Burlingame, CA, and the Allario Center in Cupertino, CA.



APPENDIX C

RFP ATTACHMENTS

ATTACHMENT C - PROPOSER GUARANTEED

ATTACHMENT D - PROPOSER WARRANTIES

ATTACHMENT C – PROPOSER GUARANTEE

The proposer certifies it can and will provide and make available, as a minimum, all services set forth in this RFP under the section titled "Services Required."



2/26/21

Signature

Geoff I. Bradley

Date

Principal + President

Printed name

M-Group

Title

Firm name

ATTACHMENT D – PROPOSER WARRANTIES

The proposer warrants that:

- It is willing and able to comply with State of California laws with respect to foreign (non-state of California) corporations.
- It is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees or agents in conjunction with the services to be provided. Coverage limits shall be \$5,000,000 or more, per occurrences and a minimum of \$15,000,000 in aggregate without reduction for claims paid during the policy period. The carrier should be duly insured and authorized to issue similar insurance policies for this nature in the State of California and rated B+ or higher by A.M. Best or an equivalent level through a similar rating agency.
- It will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of Menlo Park.
- All information provided by it in connection with this proposal is true and accurate.



2/26/21

Signature

Date

Geoff I. Bradley

Principal + President

Printed name

Title

M-Group

Firm name