



# KEYSER MARSTON ASSOCIATES

## MEMORANDUM

### DRAFT

**To:** Kirsten Chapman, ICF International

**From:** Keyser Marston Associates, Inc.

**Date:** August 5, 2025

**Subject:** Parkline Housing Needs Assessment, Supplemental Findings for Reduced Non-Residential Scenario

Keyser Marston Associates, Inc. (KMA) modified the analyses presented in the Parkline Housing Needs Assessment, dated April 2024 (“HNA”) to evaluate a scenario with one million square feet of non-residential uses, reduced from 1.38 million square feet, and 800 residential units (“Reduced Non-Residential Scenario”). Supplemental HNA findings regarding the net impact of the Reduced Non-Residential Scenario on housing availability are presented below:

Summary of Housing Availability Impacts, Reduced Non-Residential Scenario						
	Regional Total		Menlo Park Share			
			Current Commute Share Estimate		Increased Commute Share Estimate at 20%	
	Office Use Scenario	R&D Use Scenario	Office Use Scenario	R&D Use Scenario	Office Use Scenario	R&D Use Scenario
A. Added Housing Supply (New Units)	800 Units	800 Units	800 Units	800 Units	800 Units	800 Units
B. Added Employee Housing Demand	1,472 Units	1,062 Units	78 Units	56 Units	295 Units	213 Units
C. Housing Availability, Net Impact [A. - B.]	(672 Units) Net Decrease in Available Housing in Region	(262 Units)	722 Units	744 Units	505 Units	587 Units
			Net Increase in Available Housing in Menlo Park			

**Regional Housing Availability Impact** – The Reduced Non-Residential Scenario results in a 672-unit net decrease in housing availability within the region in the Office Use Scenario and a 262-unit decrease in housing availability within the region in the R&D Use Scenario, based on the difference between the estimated regional employee housing demand in each scenario and the

800 new housing units. Regional employee housing demand under the Reduced Non-Residential Scenario is estimated to be as follows:

- *Office Use Scenario* – In the Office Use Scenario, the Reduced Non-Residential Scenario would create a demand for an estimated 1,472 additional housing units regionally, including 1,248 housing units based on the 2,335 jobs added on-site, plus an estimated demand for 224 housing units for workers in off-site services to new residents such as restaurants, retail, education, medical care, and others.
- *R&D Use Scenario* – In the R&D Use Scenario, the Reduced Non-Residential Scenario would create a demand for an estimated 1,062 additional housing units regionally, including 838 housing units based on the 1,568 jobs added on-site, plus an estimated demand for 224 housing units for workers in off-site services to new residents such as restaurants, retail, education, medical care, and others.

**Housing Availability Increase in Menlo Park with Reduced Non-Residential Scenario** – The net impact on housing availability in Menlo Park is based on an estimated Menlo Park share of the total regional employee housing demand and the 800 new units added. The Menlo Park share of regional employee housing demand is estimated using two commute share scenarios consistent with the HNA.

Office Use Scenario

- *Current Commute Share Estimate (5.3%)* – Assuming existing commute patterns hold, there is an estimated net increase in available housing in Menlo Park of 722 units, based on the 800 new units in the Reduced Non-Residential Scenario, less an estimated Menlo Park share of regional employee housing demand of 78 units.
- *Increased Commute Share Estimate (20%)* – Assuming an increased 20% share of workers are housed in the city, there is an estimated net increase in available housing in Menlo Park of 505 units, considering the 800 new units in the Reduced Non-Residential Scenario, less an estimated Menlo Park share of regional employee housing demand of 295 units.

R&D Use Scenario

- *Current Commute Share Estimate (5.3%)* – Assuming existing commute patterns hold, there is an estimated net increase in available housing in Menlo Park of 744

- units, based on the 800 new units in the Reduced Non-Residential Scenario, less an estimated Menlo Park share of regional employee housing demand of 56 units.
- *Increased Commute Share Estimate (20%)* – Assuming an increased 20% share of workers are housed in the city, there is an estimated net increase in available housing in Menlo Park of 587 units, considering the 800 new units in the Reduced Non-Residential Scenario, less an estimated Menlo Park share of regional employee housing demand of 213 units.

See the HNA for information regarding analysis methodology. All analyses and assumptions for the Reduced Non-Residential Scenario are consistent with the HNA, except that office/R&D uses are assumed to be reduced so that non-residential building area does not exceed one million square feet, and an 800-unit residential component is assumed, consistent with the Project Variant analysis presented in Section 8 of the HNA.