

City of Piedmont
COUNCIL AGENDA REPORT

DATE: May 3, 2021

TO: Mayor and Council

FROM: Sara Lillevand, City Administrator

SUBJECT: Consideration of a Consulting Services Agreement with Lisa Wise Consulting, Inc., in an Amount Not to Exceed \$691,230 for Services Related to a Housing Element Update

RECOMMENDATION

1. Approve the attached consulting services agreement (Attachment A, pages 7-81) in an amount not to exceed \$691,230 between the City of Piedmont and Lisa Wise Consulting, Inc. (LWC) for services related to an update of the Housing Element of the Piedmont General Plan.
2. Encumber a total of \$700,000 from the general fund, consisting of an appropriation of \$500,000 in FY 21-22 and \$200,000 in FY22-23 for the services provided by LWC under the scope of agreement.

EXECUTIVE SUMMARY

California State Law requires that cities update the Housing Element of their General Plans every eight years. The Housing Elements must demonstrate that the jurisdiction can accommodate the production of housing units quantified in the Regional Housing Needs Allocation (RHNA). The updated Housing Element must gain certification from the California Department of Housing and Community Development (HCD) in early 2023.

The current (5th Cycle) City of Piedmont Housing Element is for the term 2015 through January 2023. The next term (6th Cycle Housing Element) will be for the years 2023 through 2031. Piedmont's RHNA for the 6th Cycle is expected to be approximately 587 new housing units. In order to prepare an update to Piedmont's Housing Element that accommodates this large increase in housing units and gain State certification, staff issued a request for proposals (RFP) on March 3, 2021, seeking the services of a professional planning team specializing in housing element updates, with proposals due on April 5, 2021. Due to the significant RHNA for the 6th Cycle, it was expected that the cost of these services would far exceed the cost of previous housing element updates for Piedmont.

Although two consulting firms demonstrated interest in the project and attended the March 17th pre-proposal conference, Lisa Wise Consulting, Inc., submitted the sole proposal received. Staff formed an ad hoc evaluation panel that reviewed the proposal and interviewed the LWC team,

which includes partner firms Plan to Place and Rincon Consultants, Inc. The panel found that the proposal meets the requirements set forth in the RFP, that it includes a robust public engagement scheme, and that the LWC team has the expertise, experience and qualifications to carry out the project at a not-to-exceed amount of \$691,230, which includes the base cost in the proposal plus the cost of the optional tasks. Additionally, the panel found that the proposal included flexibility in the scope of work so that there might be opportunities to reduce costs when practicable by adjusting the type and number of tasks. Accordingly, the panel recommends the City Council approve the agreement with LWC.

BACKGROUND

Piedmont expects a 6th Cycle RHNA of approximately 587 housing units, compared to 60 units in RHNA 5. This represents a 979 percent increase from the current planning cycle. The expected 6th Cycle allocation includes:

- 163 very low income units
- 94 low income units
- 92 moderate income units
- 238 above moderate income units
- 587 units - total

As noted in the Executive Summary section above, the City will need to prepare and submit an updated Housing Element to the California Department of Housing and Community Development for certification by the end of 2022. For this purpose, on March 1, 2021 the City Council considered and approved the issuance of a request for proposals for a Housing Element Update, a Safety Element Update, other related General Plan amendments, related regulatory modifications as required by State law. That RFP was issued on March 3rd and the City received one proposal on the due date of April 5, 2021.

DISCUSSION

Although two consulting firms initially expressed interest in the project and attended the pre-proposal meeting held by staff, the City received just one proposal. The consulting firm that was interested but did not submit a proposal is headquartered outside California and informed staff that they could not put together a partnership with local firms. The receipt of one or occasionally two proposals is what has been commonly occurring across California. Some cities, such as Sausalito, have received no proposals in response to their RFPs.

The proposal submitted is by a team led by Lisa Wise Consulting, Inc., which will provide the lead research and planning services, partnered with Plan to Place, which will lead the public engagement efforts, and Rincon Consultants, Inc., which will draft the state required updates to the Natural Resources and Sustainability Element and the Environmental Hazards Element of the General plan (as required by State law when a housing element is updated). In accordance with the RFP, the scope of work includes:

- Task 1: Project Management and Coordination
- Task 2: Community Outreach and Engagement
- Task 3: Housing Technical Studies and Issues Evaluation

- Task 4: Sites Inventory
- Task 5: Affirmatively Furthering Fair Housing (Assessment)
- Task 6: General Plan Amendments
- Task 7: Draft Housing Element and Public Meetings
- Task 8: Final Draft Meetings, Final Adoption and Certification
- Task 9: Identification of potential AB 1851 Sites (religious institutions affiliated housing)
- Optional Tasks: Stakeholder/Focus Group Meetings (6); Surveys (1); Planning Commission and City Council Study Sessions (2); Tailoring of ABAG Regional Housing Technical Assistance Content; Fiscal Impact Analysis; and Informational Videos for use on social media and the project website. (The not-to-exceed amount of the agreement includes 5 Informational Videos.)

As required by the RFP, the scope of work includes a robust public engagement campaign, including 6 meetings of the Housing Advisory Committee, 4 community workshops, 3 meetings of the Planning Commission, and 3 meetings of the City Council. Integrated into this scope is the flexibility to add or substitute optional tasks for items in this list. The intent is to improve results and/or reduce costs when those opportunities arise.

LWC and Plan to Place are already working with the City on the evaluation of the implementation of the current 5th Cycle Housing Element, and the research and development of housing policy that facilitates the production of housing under the scope of work funded by SB2. Through this work these firms have been introduced to the Piedmont Community and have become familiar with its housing challenges.

Proposal Review

Staff formed an ad hoc panel to review proposals submitted in response to the RFP. The panel included:

- Rani Batra – Piedmont resident, Chair of the Planning Commission, member of the Housing Advisory committee
- Irene Cheng – Piedmont resident, architectural historian, co-chair of the Piedmont Racial Equity Campaign’s Housing Committee
- June Catalano – Piedmont resident, City Manager for the City of Pleasant Hill, member of the Housing Advisory Committee
- Kevin Jackson – Director of Planning and Building
- Pierce Macdonald-Powell –Senior Planner

The review panel received copies of the proposal on April 6. After separately reviewing the proposal the panel met on April 12 to evaluate the proposal, determining that the proposing team was qualified and that the proposal met the requirements of the RFP, but also desiring a meeting with the proposing team on April 19th to discuss some items and gain clarifications before making a recommendation. Upon the close of this meeting the panel concluded that with some specified modifications to the scope of work the proposal could be unanimously recommended for approval. That modified proposal is under consideration tonight.

FISCAL IMPACTS

The not-to-exceed cost of the agreement is \$691,230. This includes both the base cost of \$612,230 and the \$79,000 cost of the optional tasks, including five informational videos. The draft budget for Fiscal Year 2021/2022 includes an allocation of \$500,000 for the housing element update project, which would be followed by a budget for FY 2022/2023 that would propose to include an allocation of funds necessary to complete the project through certification. As noted below a CEQA consultant will be engaged separately, with the cost of environmental review expected to be in the range of \$300,000.

The cost of Piedmont's 6th Cycle Housing Element update is significantly higher than the cost of previous cycles, due to the nearly 1,000% expected increase in the RHNA as compared to the 5th Cycle RHNA. Identifying sites and developing policies and regulations for this amount of housing will be a significant challenge requiring significant resource allocation. For comparison purposes, the costs for housing element updates in other cities are listed below.

City	HE update cost
Menlo Park	\$1,500,000
Pleasanton	\$302,001 *
Dublin	\$403,000
Berkeley	\$540,000

*Does not include CEQA review.

Staff believes the proposed cost aligns with the challenge. However, staff drafted the RFP and has worked with LWC to include flexibility in the scope so that should cost-saving opportunities arise where a task could be eliminated or substituted for another, the project goals can be achieved for less than the not-to-exceed amount.

Funding

Staff has and is actively pursuing grant funds to help offset the costs of the housing element update and other housing policy development. The City has received a total of \$160,000 in funding from the SB2 grant to assist with the evaluation of the current Housing Element and other housing policy that sets the stage for the 6th Cycle Housing Element update. LWC is currently engaged to complete this preliminary work. For direct application toward the 6th Cycle Housing Element update, the City has been approved to receive \$65,000 in Local Early Action Planning (LEAP) grant funds. In addition, staff has applied for \$120,000 in grants through the state's Regional Early Action Planning (REAP) program.

The City has a General Plan maintenance fee established by the City Council in 2019, which is applied to each building permit. Since its implementation on July 1, 2019, the General Plan maintenance fee has generated approximately \$300,000 in revenue to the General Fund, which is required to be spent on updates and amendments to the General Plan and other auxiliary documents (e.g., Climate Action Plan, Zoning Ordinance, Piedmont Design Guidelines, Pedestrian and Bicycle Master Plan, and Hazard Mitigation Plan). Costs not covered by grant funding from the state and the maintenance fee will require General Fund allocations.

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) DETERMINATION FOR HOUSING ELEMENT UPDATE

The scope of services sought in the RFP did not include the preparation of documents for California Environmental Quality Act (CEQA) review and submittal. Staff plans to issue a RFP seeking to engage a separate CEQA consultant to prepare, post, and file all appropriate environmental documents for compliance with CEQA. LWC and the selected CEQA consultant will need to work in coordination with the City to complete this task. Depending on the results of Task 6, Housing Program Options, and Task 7, Sites Inventory/RHNA the scope and cost of the necessary environmental review could vary greatly, from a Mitigated Negative Declaration (estimated cost of \$100,000) to a full Environmental Impact Report (estimated cost of \$300,000). The RFP is expected to be issued in June 2021 so that a CEQA consultant is engaged by the end of August.

CONCLUSION AND NEXT STEPS:

Staff recommends that the City Council approve the Professional Service Agreement with Lisa Wise Consulting, Inc. Should the City Council approve the agreement, staff is tentatively scheduled to meet with the LWC team on May 20th for the project kick-off.

Prepared by: Kevin Jackson, Director of Planning & Building

ATTACHMENTS:

Pages	
A 7-81	Agreement with Lisa Wise Consulting, Inc., for services related to an update to the Housing Element of Piedmont's General Plan
17-86	Exhibit A to the Agreement – Scope of Work
87	Exhibit B to the Agreement – Compensation Rate Sheet

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AGREEMENT FOR CONSULTANT SERVICES

This Agreement for Consultant Services (the "Agreement") is made and entered into this 3rd day of May, 2021, by and between THE CITY OF PIEDMONT, a municipal corporation (hereinafter referred to as "CITY") and LISA WISE CONSULTING, INC., a California S-Corporation (hereinafter referred to as "CONSULTANT"). CITY and CONSULTANT may be referred to individually as "Party" and collectively as the "Parties."

RECITALS

WHEREAS, CITY requires professional services in connection with the completion of a housing element update and other related General Plan amendments and related regulatory modifications as required by State law, in a manner consistent with the Regional Housing Needs Allocation 6 (RHNA 6) planning period (January 31, 2023 – January 31, 2031);

WHEREAS, CONSULTANT is qualified to perform such services; and

WHEREAS, CONSULTANT has agreed to provide CITY with such services on the terms and conditions set forth herein.

NOW, THEREFORE, for the considerations hereinafter set forth, CONSULTANT and CITY agree as follows:

ARTICLE 1 - SCOPE OF SERVICES

- 1.1. **Scope of Work.** CONSULTANT agrees to furnish the services set forth in Exhibit A, Scope of Work, which is attached hereto and incorporated herein (the "Services").
- 1.2. **Compliance with Law.** The Services shall be performed in accordance with all applicable federal, state and local laws, ordinances, rules, regulations and orders.
- 1.3. **Time is of the Essence.** CONSULTANT agrees to diligently prosecute the Services. In the performance of this Agreement, time is of the essence.
- 1.4. **Professional Competence.** CONSULTANT represents that it has the professional skills necessary to perform the Services and that it will perform the Services in a skillful and professional manner. CONSULTANT represents that it has all the necessary licenses to perform the Services and shall maintain them throughout the term of this Agreement. CONSULTANT agrees that the Services shall be performed in the manner and according to the standards observed by a competent practitioner of the profession in which CONSULTANT is engaged, in the same or similar geographical area in which CONSULTANT practices its profession, and will prepare all work products required by this Agreement in accordance with such standards. CITY and CONSULTANT agree that CONSULTANT is in responsible charge of the Services and CITY shall have no control over the method or means of performance of the Services. Acceptance by CITY of the Services does not operate as a release of CONSULTANT from professional responsibility for the Services performed.

- 1.5. **Independent Contractor.** CONSULTANT is an independent contractor and not an employee of CITY. CONSULTANT expressly warrants that it will not represent that it is an employee of CITY. Persons employed or utilized by CONSULTANT in the performance of the Services will not be employees or agents of CITY. CONSULTANT is solely responsible for the payment of employment taxes incurred under this Agreement and any similar federal or state taxes.
- 1.6. **Confidentiality.** CONSULTANT agrees to maintain in confidence and not disclose to any person, firm, governmental entity, or corporation, without CITY's prior written consent, any trade secret or confidential information, knowledge or data relating to the products, process, or operation of CITY. CONSULTANT further agrees to maintain in confidence and not to disclose to any person, firm, governmental entity, or corporation any data, information, technology, or material developed or obtained by CONSULTANT during the performance of the Services. The covenants contained in this Section 1.6 shall survive the termination of this Agreement for whatever cause.
- 1.7. **Ownership of Material.** Any reports and other material prepared by or on behalf of CONSULTANT under this Agreement (collectively, the "Documents") shall be and remain the property of CITY. All Documents not already provided to CITY shall be delivered to CITY on the date of termination of this Agreement for any reason. The Documents may be used by CITY and its agents, employees, representatives, and assigns, in whole or in part, or in modified form, for all purposes CITY may deem appropriate without further employment of or payment of any compensation to CONSULTANT.
- 1.8. **Documentation.** CONSULTANT shall keep and maintain full and complete documentation and accounting records, employee time sheets, and correspondence pertaining to the performance of the Services, and CONSULTANT shall make such documents available for review and/or audit by CITY and CITY's representatives at all reasonable times for at least four years after the termination of this Agreement or completion of the Services.
- 1.9. **Testimony.** CONSULTANT agrees to testify at CITY's request if litigation is brought against CITY in connection with the Services. Unless the action is brought by CONSULTANT or is based upon CONSULTANT's negligence, CITY will compensate CONSULTANT for the preparation and the testimony at CONSULTANT's standard hourly rates.

ARTICLE 2 - COMPENSATION

- 2.1. **Compensation.** Compensation for the Services shall be in accordance with Exhibit B, Compensation, attached hereto and incorporated herein. It is agreed that the compensation for the Services shall not exceed \$691,230.00 ("Cost Ceiling").
- 2.2. **Invoices.** CONSULTANT shall submit monthly invoices in a form satisfactory to CITY on or before the tenth day of each month for Services provided during the preceding month. CONSULTANT shall submit time and cost records as necessary to substantiate performance of the Services. Within 35 days after receipt of each such invoice, CITY

shall verify the accuracy of the invoice, correct the charges where appropriate and as discussed and mutually agreed with CONSULTANT, and make payment to CONSULTANT in an amount equal to the amount of such invoice, as verified or corrected by CITY. No payment hereunder shall be construed as evidence of acceptance of any of CONSULTANT's work. CITY reserves the right to withhold payment from CONSULTANT on account of Services not performed satisfactorily, delays in CONSULTANT's performance of Services, or other defaults hereunder. CONSULTANT shall not stop or delay performance of the Services under this Agreement on account of payment disputes with CITY.

- 2.3. **Status Reports.** Together with each monthly invoice, CONSULTANT shall submit a status report detailing the amount expended on the Services to that date and the remaining amount to be expended before the Cost Ceiling is reached. CONSULTANT shall notify CITY in writing when payments have reached 90 percent of the Cost Ceiling.
- 2.4. **Withholding.** In lieu of holding retention, CITY shall withhold CONSULTANT's final payment until the Services are complete and CITY has received all Documents. CONSULTANT shall diligently continue and complete performance of the Services if the Services are not complete at the time CONSULTANT has performed services up to the Cost Ceiling.

ARTICLE 3 - TIME OF PERFORMANCE

- 3.1. **Effective Date.** This Agreement shall become effective upon execution of the second signature and shall remain in full force and effect until the Services are completed (the "Term"). CONSULTANT agrees to complete all services by June 30, 2023.
- 3.2. **Termination.** This Agreement may be terminated at any time by CITY upon written notice to CONSULTANT.
- 3.3. **Final Payment.** CONSULTANT shall be entitled to compensation for Services performed up to the time of such termination, it being understood that any payments are full compensation for the Services rendered under this Agreement.
- 3.4. **Other Remedies.** Nothing in this Article 3 shall be deemed to limit the respective rights of the parties to terminate this Agreement for cause or otherwise to exercise any rights or pursue any remedies which may accrue to them.

ARTICLE 4 - DESIGNATED CONTACTS

- 4.1. **CITY Contact.** CITY designates Kevin Jackson, its Planning & Building Director, as its contact who shall be responsible for administering and interpreting the terms and conditions of this Agreement, for matters relating to CONSULTANT's performance under this Agreement, and for liaison and coordination between CITY and CONSULTANT. In the event CITY wishes to make a change in CITY's representative, CITY will notify CONSULTANT of the change in writing.

- 4.2. **CONSULTANT Contact.** CONSULTANT designates Kathryn Slama as its contact, who shall have immediate responsibility for the performance of the Services and for all matters relating to performance under this Agreement. Any change in CONSULTANT's designated contact shall be subject to written approval by CITY.

ARTICLE 5 - INDEMNIFICATION AND INSURANCE

- 5.1. **Indemnification.** CONSULTANT shall, to the fullest extent allowed by law, with respect to claims, liability, loss, damage, costs, or expenses, including reasonable attorney's and expert witness fees, awards, fines, penalties, or judgments, arising out of or relating to the Services (collectively "Claims"), defend, indemnify, and hold harmless CITY, its Officials, officers, employees and agents (the "CITY Parties"), except to the extent the Claims are attributable to CITY Parties' gross negligence or willful misconduct. CONSULTANT shall defend the CITY Parties as required by California Civil Code Section 2778, and with counsel reasonably acceptable to those parties. CONSULTANT shall have no right to seek reimbursement from the CITY Parties for the costs of defense.

If CONSULTANT is a "design professional," as defined in California Civil Code Section 2782.8(c), CONSULTANT shall indemnify, defend, and hold the Indemnitees harmless against Liability only to the extent such Liability arises out of, pertains to, or relates to CONSULTANT's negligence, recklessness, or willful misconduct. In such an event, the cost to defend charged to CONSULTANT shall not exceed CONSULTANT's proportionate percentage of fault.

The obligations contained in this Section 5.1 shall survive the termination of this Agreement for whatever cause for the full period of time allowed by law and shall not in any way be limited by the insurance requirements of this Agreement.

- 5.2. **Health and Safety.** CONSULTANT may perform part of the Services at sites which contain unknown working conditions and contaminated materials. CONSULTANT shall be solely responsible for the health and safety of CONSULTANT's employees during the performance of the Services.

Insurance. CONSULTANT and all of CONSULTANTS employees, subcontractors, consultants and other agency shall procure, provide and maintain at all times during the performance of this Agreement, and for such additional periods as described herein, the insurance listed below with insurers licensed to do business in the State of California and with a Best's rating of no less than A:VII.

- A. Commercial Automobile Liability Insurance. ISO Form Number CA 00 01 covering any auto (Code 1), or if Consultant has no owned autos, covering hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.
- B. Commercial General Liability Insurance. Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an "occurrence"

basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$2,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 05 09 or 25 04 05 09) or the general aggregate limit shall be twice the required occurrence limit.

- C. Professional Liability Insurance. As appropriate to Consultant's services, and not less than \$2,000,000 per occurrence.
- D. Workers Compensation Insurance. Workers Compensation insurance, occupational disease insurance and employer's liability insurance shall be required with minimum limits as required by law, covering all workplaces involved in this Agreement.
- E. Policy Terms. Concurrently with execution of this Agreement, CONSULTANT shall provide CITY with Certificates of Insurance evidencing that CONSULTANT has obtained or maintains the insurance required by this Section 5.3. The Certificates shall be on forms acceptable to CITY. CONSULTANT shall also furnish CITY with original endorsements with the following documentation:
 - Precluding cancellation or reduction in coverage before the expiration of thirty (30) days after CITY shall have received written notification thereof from CONSULTANT by United States mail;
 - Providing that CONSULTANT's insurance shall apply separately to each insured against whom claim is made or suit is brought, and include a "separation of insureds" or "severability" clause which treats each insured separately, except with respect to the limits of the insurer's liability (cross-liability endorsement);
 - Excepting CONSULTANT'S professional liability insurance, naming CITY, its City Council, boards, commissions, committees, officers, employees and agents as additional insureds ("Additional Insureds"); and
 - Providing that for any claims relating to CONSULTANT's services hereunder, CONSULTANT's insurance coverage shall be primary insurance with respect to CITY, its City Council, boards, commissions, committees, officers, employees and agents, and that any insurance or self-insurance maintained by CITY for itself, its City Council, boards, commissions, committees, officers, employees and agents shall be in excess of CONSULTANT's insurance and shall not be contributory with it.
 - It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverages requirements and/or limits shall be available to the Additional Insured, including but not limited to any umbrella or excess insurance. Furthermore, the requirements for coverage and limits shall be the greater of: (a) the minimum coverage and limits specified in this Agreement; or (b) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured.

- F. **Material Breach.** If CONSULTANT fails to maintain insurance coverage or provided insurance documentation which is required pursuant to this Agreement, it shall be deemed a material breach of this Agreement. CITY, at its sole option, may terminate this Agreement and obtain damages from CONSULTANT resulting from said breach. Alternatively, CITY may purchase the required insurance coverage, and without further notice to CONSULTANT, may deduct from sums due to CONSULTANT any premium costs advanced by CITY for such insurance. These remedies shall be in addition to any other remedies available to CITY.

ARTICLE 6 - NOTICES

All notices or other communications required or permitted hereunder shall be in writing, and shall be personally delivered or sent by facsimile or reputable overnight courier and shall be deemed received upon the earlier of: (1) if personally delivered, the date of delivery to the address of the person to receive such notice; (2) if delivered by Federal Express or other overnight courier for next business day delivery, the next business day; (3) if sent by facsimile, with the original sent on the same day by overnight courier, the date on which the facsimile is received, provided it is before 5:00 P.M. Pacific Time; or (4) if sent electronically, the date of delivery on the confirmed read receipt. Notice of change of address shall be given by written notice in the manner described in this Article 6. Rejection or other refusal to accept or the inability to deliver because of a change in address of which no notice was given shall be deemed to constitute receipt of the notice or communication sent. Unless changed in accordance herewith, the addresses for notices given pursuant to this Agreement shall be as follows:

If to CITY: Sara Lillevand, City Administrator
120 Vista Avenue
Piedmont, CA 94611
Phone: (510) 420-3040
Facsimile: (510) 653-8272
Email: slillevand@piedmont.ca.gov

If to CONSULTANT: Kathryn Slama
983 Osos Street
San Luis Obispo, CA 93401
Phone: (805) 595-1345
Email: kathryn@lisawiseconsulting.com

ARTICLE 7 - MISCELLANEOUS

- 7.1. **Conflict of Interest Prohibition.** CITY and CONSULTANT will comply with the requirements of the CITY's Conflict of Interest Code adopted pursuant to California Government Code §87300 et seq., the Political Reform Act (California Government Code §81000 et seq.), the regulations promulgated by the Fair Political Practices Commission (Title 2, §18110 et seq. of the California Code of Regulations), California Government Code §1090 et seq., and any other ethics laws applicable to the performance of the Services and/or this Agreement. CONSULTANT may be required to file with the CITY

Clerk a completed Form 700 before commencing performance of the Services unless the CITY Clerk determines that completion of a Form 700 is not required, pursuant to CITY's Conflict of Interest Code. Form 700 forms are available from the CITY Clerk.

CONSULTANT may not perform Services for any other person or entity that, pursuant to any applicable law or regulation, would result in a conflict of interest or would otherwise be prohibited with respect to CONSULTANT's obligations pursuant to this Agreement. CONSULTANT agrees to cooperate fully with CITY and to provide any necessary and appropriate information requested by CITY or any authorized representative concerning potential conflicts of interest or prohibitions concerning CONSULTANT's obligations pursuant to this Agreement.

CONSULTANT may not employ any CITY official, officer or employee in the performance of the Services, nor may any official, officer or employee of CITY have any financial interest in this Agreement that would violate California Government Code §1090 et seq. CONSULTANT hereby warrants that it is not now, nor has it been in the previous twelve (12) months, an employee, agent, appointee, or official of CITY. If CONSULTANT was an employee, agent, appointee, or official of CITY in the previous twelve months, CONSULTANT warrants that it did not participate in any manner in the forming of this Agreement. CONSULTANT understands that, if this Agreement is made in violation of Government Code §1090 et seq., the entire Agreement is void and CONSULTANT will not be entitled to any compensation for CONSULTANT's performance of the Services, including reimbursement of expenses, and CONSULTANT will be required to reimburse CITY for any sums paid to CONSULTANT under this Agreement. CONSULTANT understands that, in addition to the foregoing, penalties for violating Government Code §1090 may include criminal prosecution and disqualification from holding public office in the State of California.

Any violation by CONSULTANT of the requirements of this provision will constitute a material breach of this Agreement, and the CITY reserves all its rights and remedies at law and equity concerning any such violations.

- 7.2. **Subcontracting.** CONSULTANT may subcontract portions of the Services upon the prior written approval of CITY. CONSULTANT will be solely responsible for payment of such subcontract Services. No contractual relationship will exist between any such subcontractors of CONSULTANT and CITY. CONSULTANT's subcontractors agree to be bound to CONSULTANT and CITY in the same manner and to the same extent as CONSULTANT is bound to CITY under the Agreement. CONSULTANT's subcontractors further agree to include the same requirements and provisions of this Agreement, including the indemnity and insurance requirements, with any sub-subcontractor to the extent they apply to the scope of the sub-subcontractor's work. A copy of the CITY indemnity and insurance provisions will be furnished to CONSULTANT's subcontractors upon request.
- 7.3. **Entire Agreement.** This Agreement represents the entire understanding of CITY and CONSULTANT as to those matters contained herein. No prior oral or written understanding shall be of any force or effect with respect to those matters covered

hereunder. This Agreement may only be modified by an amendment in writing signed by each party.

- 7.4. **No Assignment.** The Services are deemed unique and neither party shall assign, transfer, subcontract or otherwise substitute its interest in this Agreement or any of its obligations hereunder without the prior written consent of the other party. As limited by this Section 7.2, this Agreement is to be binding on the successors and assigns of the parties hereto.
- 7.5. **Severability.** If any part of this Agreement is determined to be unconstitutional, invalid or beyond the authority of either party, such decision shall not affect the validity of the remainder of this Agreement, which shall continue in full force and effect, provided that the remainder of this Agreement can be interpreted to give effect to the intentions of the parties.
- 7.6. **Counterparts.** This Agreement may be signed in counterparts and, when fully signed, such counterparts shall have the same effect as if signed in one document.
- 7.7. **Choice of Law.** This Agreement and all matters relating to it shall be governed by the laws of the State of California without reference to its choice of laws principles and venue shall be in the appropriate court in San Mateo County, California.
- 7.8. **Waiver.** No failure on the part of either Party to exercise any right or remedy hereunder shall operate as a waiver of any other right or remedy that party may have hereunder. A waiver by either CITY or CONSULTANT of any breach of this Agreement shall not be binding upon the waiving party unless such waiver is in writing. In the event of a written waiver, such a waiver shall not affect the waiving party's rights with respect to any other further breach.
- 7.9. **Mediation.** In the event the parties are unable to resolve a dispute arising under this Agreement through good faith negotiations, the parties agree to submit the matter to mediation with a mutually agreeable mediator. Prior to the mediation, the parties shall exchange any documents reasonably necessary to resolve the matter to be mediated.
- 7.10. **Attorney's Fees.** If any action at law or in equity, including an action for declaratory relief, is brought to enforce or interpret the provisions of this Agreement, the prevailing party shall be entitled to reasonable attorneys' fees, which may be set by the court in the same action or in a separate action brought for that purpose, in addition to any other relief to which that party may be entitled.
- 7.11. **Interpretation.** In the event this Agreement is ever construed in any dispute between the parties, it and each of its provisions shall be construed without regard to the party or parties responsible for its preparation and shall be deemed to have been prepared jointly by the parties. The rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not be employed in interpreting this Agreement.
- 7.12. **Authority.** Each individual executing this Agreement on behalf of one of the parties represents that he or she is duly authorized to sign and deliver the Agreement on behalf of such party and that this Agreement is binding on such party in accordance with its terms.

- 7.13. **Third Parties.** Nothing contained in this Agreement shall create a contractual relationship with, or cause of action in favor of, a third party against either the CITY or CONSULTANT. CONSULTANT's Services hereunder are being performed solely for the benefit of CITY. CITY shall be an express third-party beneficiary of all contracts between CONSULTANT and any subcontractors or subconsultants in connection with any services performed in connection with, or in furtherance of, this Agreement.

* * *

[Signatures on following page]

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date set forth above.

CITY OF PIEDMONT

By: _____
Sara Lillevand, City Administrator

Date: _____

CONSULTANT

By: _____
Henry Pontarelli, Vice President/Secretary

Date: _____

Attest

By: _____
John Tulloch, City Clerk

Approved As To Form

By: _____
Michelle Marchetta Kenyon, City Attorney



CITY OF PIEDMONT, CA

6TH CYCLE 2023-2031 HOUSING ELEMENT UPDATE

RESPONSE TO REQUEST FOR PROPOSALS

APRIL 5, 2021

Prepared for:



City of Piedmont
120 Vista Avenue
Piedmont, CA 94611

Prepared by:



Lisa Wise Consulting, Inc.
870 Market Street, Suite 977
San Francisco, CA 94102
www.lisawiseconsulting.com
(805) 595-1345



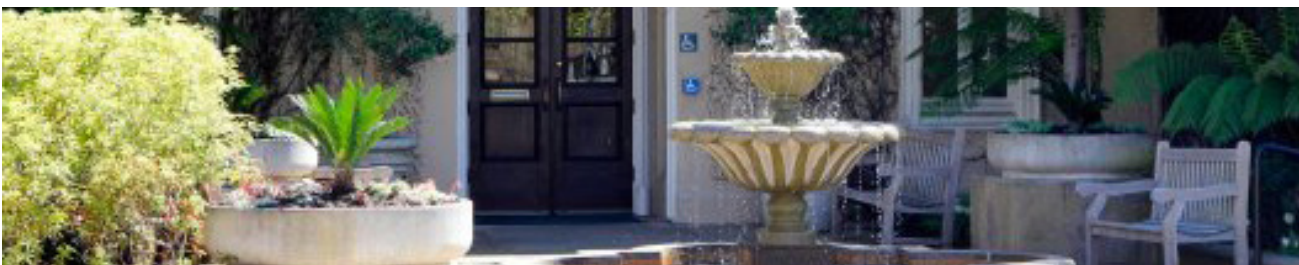
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Cover Letter/Executive Summary

April 23, 2021

LWC

Kevin Jackson, AICP
 Director of Planning & Building
 City of Piedmont
 120 Vista Avenue
 Piedmont, CA 94611
 (510) 420-3039
piedmonthousingRFP@piedmont.ca.gov

RE: Lise Wise Consulting, Inc. (LWC) Proposal in Response to City of Piedmont RFP, Housing Element Update, 6th Cycle/2023-2031

Dear Kevin Jackson,

On behalf of our very qualified and motivated team, we are pleased to submit our proposal to Update the City of Piedmont 6th Cycle (2023-2031) Housing Element. Our proposal contains all the elements identified in the RFP including the 1) Cover Letter/Executive Summary, 2) Project Approach, Scope of Work, and Deliverables, 3) Consultant identification and Team, 4) Related Project Examples and References, 5) Public Engagement Experience and 6) Fee Proposal.

Our Team has a strong Housing Element Update resume in the 4th, 5th and 6th Cycles as well as direct and on-going experience in Piedmont, including zoning code and housing policy review and assessment, funding and implementation recommendations, and community engagement, branding, and messaging.



LWC will lead the team with **Lisa Wise, AICP** as the Principal in Charge. Lisa will work closely with our Director **David Bergman**, who has 25 years of planning and housing experience. **Kathryn Slama** will act as Project Manager. Kathryn has led 12 Housing Element Updates in the 4th, 5th and 6th Cycles and dedicated her career to zoning, housing, efficient project management and making California cities stronger.



Plan to Place is a Bay Area leader in community engagement strategies and outreach programs. As the owner of the firm, **David Javid** will act as Principal in Charge, and work closely with **Paul Kronser**, Senior Community Engagement and Design Specialist and **Rachael Sharkland**, Outreach and Graphic Design Specialist



Rincon brings a staff of over 250 environmental science and land use planning professionals. Rincon's team of **Matt Maddox, Della Acosta, Apirl Durham, Craig Lawrence, and Torin Snyder** will address the Conservation and Safety Element updates cited in Task 9.

The main point of contact and LWC Project Manager is Kathryn Slama. Kathryn brings 8 years of California housing, zoning and project management experience. She will be responsible for the day-to-day communication among the Team and with the City. Kathryn will track project progress and work with LWC Principal, Lisa Wise and LWC Director, David Bergman to review all deliverables and assure they are accurate, timely and completed within budget.

Since our inception in 2006, LWC has focused on California housing law and working with cities and the Department of Housing and Community Development (HCD) to complete 22 certified and adopted Housing Element Updates in the 4th and 5th cycles. We are also leading eight Housing Elements in

the 6th Cycle. We understand what it takes to complete a Housing Element Update under the heightened requirements of the 6th Cycle given the complex site eligibility and placement criteria, greater emphasis on racial and economic equity, and more realistic measures for determining development potential. As experts in housing, zoning codes, economic and financial feasibility analysis, we take a comprehensive, 360-degree view of the Housing Element Update process. Our approach prioritizes working closely with City staff and the community to create appropriate policies and effective programs and implementation strategies as well as collaborating with HCD on requirements.

LWC is a California-based firm. Our staff lives, works, and pays rents and mortgages in California. We are committed to moving the needle on making housing more affordable and attractive while maintaining a community's most valued features (such as safe and stable neighborhoods, vibrant commercial corridors, and a small town, friendly atmosphere). LWC also brings a high level of preparedness through our work on projects aimed at accelerating and streamlining housing production such as objective design standards, inclusionary housing ordinances, density bonus programs, housing prototype feasibility testing, in-lieu fee studies and capacity studies.

Our Team includes Plan to Place who will focus on Community Outreach and Engagement and gaining feedback on important topics from a broad cross section of the community, particularly those who do not typically participate in the public dialogue. Rincon Consultants will focus on the Safety and Conservation Element update in Task 9. LWC, Plan to Place and Rincon have a long history of collaboration and mutual trust and will be able to work efficiently to complete the project on time and within budget.

We acknowledge that we have received all of the addendums to the RFP and we have reviewed and can comply with the Agreement for Consultant Services as presented (pages 15-25) in the RFP.

We appreciate the opportunity to submit a proposal to continue our work in the City of Piedmont. Our resume of HCD-certified Housing Elements along with local understanding gained from our work on the SB2 Housing Programs will help achieve a community-supported, comprehensive and legally compliant 6th Cycle Housing Element Update. We look forward to discussing the proposal in more detail and will be happy to consider refinements at the City's discretion.

Sincerely,



Lisa Wise, AICP, CPA (inactive)
President, CEO
Lisa Wise Consulting, Inc.
983 Osos Street
San Luis Obispo, CA 93401
lisa@lisawiseconsulting.com
805.595.1345

LWC is leading eight Housing Element Updates in the 6th Cycle:

- Pleasanton
- Woodland
- Long Beach
- Santa Maria
- Coachella
- San Gabriel
- Beaumont
- Temple City

LWC is leading housing compliance projects:

- Piedmont, CA, Objective Design Standards (ODDS)
- Los Altos, CA, ODDS
- Redwood City, CA, Residential Design Guidelines
- St. Helena, CA, Inclusionary Housing Ordinance
- Beaumont, CA, Housing In-Lieu Fee and ODDS
- Marin County, CA, Housing Prototype Feasibility Analysis
- Mountain View, CA, Financial Feasibility Site Testing

Contact Person:

Kathryn Slama
983 Osos St.,
San Luis Obispo, CA 93401
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Project Approach, Scope of Work, and Deliverables

Understanding of the Assignment

Piedmont is one of the 100 ABAG jurisdictions that must adopt their 6th Cycle Housing Element Update (HEU) and submit to the California State Department of Housing and Community Development (HCD) for certification by January 31, 2023. The 6th Cycle differs from previous housing cycles and includes a much higher level of examination and scrutiny by HCD to ensure compliance with State Law. This presents new challenges for Piedmont- a small city with a limited amount of vacant sites, many of which are constrained, a history of low development activity, and no opportunities for annexation. Piedmont's current draft RHNA allocation at 587 units is significantly higher than the 4th and 5th Cycle RHNA's. Meeting this target will require creativity, an effective community engagement effort, and a laser focus on aligning new housing policy with Piedmont's small-town nature.

To comply with State housing mandates with as much control and input as possible, the City hired LWC in August 2020 to develop Objective Design Standards and ADU Prototypes and Incentives. This effort involved a survey to establish community preferences for the look and feel of multi-family residential and mixed-use development. LWC will leverage this community involvement and understanding of local priorities and work closely with the City to deliver a Housing Element Update that is legally compliant, achieves the City's objectives, and is understood by the community.

Our Understanding Informs Our Approach

We understand the City's ongoing efforts to maintain a beautiful, safe, and equitable Piedmont. Our experience working with the community has led us to appreciate the exceptional care the City devotes to securing a high quality of life for its residents. We recognize that engagement with the community will be a critical factor for success and, as a Consultant Team, we are prepared to address these needs with a thorough and efficient approach that prioritizes robust community engagement, close collaboration with the City, and a clear understanding of existing conditions and HCD's requirements for certification. Our Team will draw on our deep and diverse experience and expertise in 6th Cycle housing elements, community engagement, and zoning codes as well as our enthusiasm, attention to detail, and commitment to the highest industry standards.

Piedmont's advantages and characteristics highly valued by the community are proximity to employment centers, excellent schools, low crime rate, historic architecture, beautiful residential neighborhoods and parks.



With the update to the 6th Cycle Housing Element, the City of Piedmont aims to establish legislative policies and programs to accommodate the City's RHNA, maintain control of development outcomes, and preserve the city's beautiful residential neighborhoods, attractive parks and small-town feel.

Project Approach

Approach

LWC's approach to Housing Element Updates in the 6th Cycle is rooted in: (1) compliance with State law, (2) effective project management, (3) strong working relationship with HCD, 4) substantive community outreach, and (4) commitment to client service. LWC's approach has been shaped by our experience developing effective implementation plans in the 6th Cycle for large and small cities, with insufficient vacant or underutilized sites to accommodate their RHNA without changes to development capacity. We consider each community to be unique and rely on City Staff and the community to augment data gathered from GIS, Google Maps and the ABAG/MTC Data Package to provide a clearer and more comprehensive understanding of site availability.

Compliance with State Law

LWC will work closely with City Staff and the community to assure compliance with statewide housing statutes, as established by California Government Code §65580 - 65589.11, HCD requirements, and recent State housing legislation, including:

- Adequate Housing Element Sites (AB 1397)
- Housing Crisis Act (SB 330)
- No Net Loss (SB 166)
- Affirmatively Furthering Fair Housing (AB 686)

LWC has a strong working knowledge of HCD requirements and the new laws impacting the 6th Cycle, some of which have not yet been fully tested. Our approach is fashioned on experience and lessons learned from 6th Cycle Housing Element Updates in Woodland, Pleasanton, Long Beach, Santa Maria, Coachella, Temple City, Beaumont and San Gabriel and over 20 HCD-certified Housing Element Updates in the 4th and 5th Cycles.



BigTime enables LWC to track project performance by staff member, by task relative to timeline and budget and better evaluate and anticipate the needs of the project.

Effective Project Management

LWC's successful project management approach relies on frequent internal progress updates with the Consultant Team, consistent communication with City Staff, systematic and hierarchical review of all deliverables, and the use of BigTime, an online time management platform. The combination of frequent evaluation and communication among the team and with the client, coupled with a robust project management software, enables LWC to forecast needs and capacity through the life of the project and make adjustments before issues arise.

Project Approach

A Strong Working Relationship With HCD

LWC brings over 14 years of housing policy experience and has delivered over 20 adopted and HCD-certified HEUs in the 4th and 5th Cycles through a close, communicative working relationship with City staff and HCD. This approach enables us to anticipate HCD's priorities, communicate with HCD staff, make edits quickly and ultimately ensure compliance and certification. Our partnership is particularly crucial in this 6th Cycle as Piedmont (similar to many of the jurisdictions in which we are working) are contending with a substantially greater RHNA obligation, stricter site selection criteria, additional reporting requirements, and State mandates that are in the process of being defined.

Substantive Community Engagement

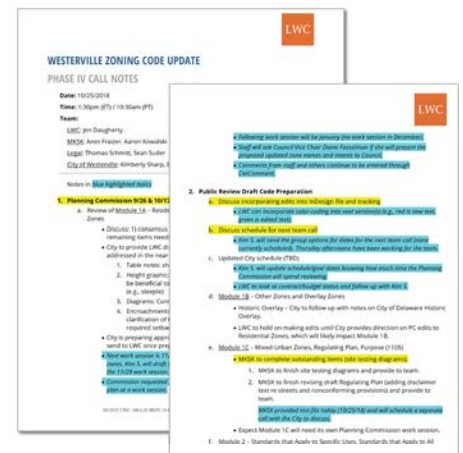
Our approach assures that a broad section of the community has multiple and substantive opportunities to learn about the project, provide feedback, and track project progress. The Consultant Team, which includes outreach lead Plan to Place, will work closely with the community through workshops, public meetings, stakeholder interviews, surveys, online platforms and public hearings. Much of the outreach will focus on developing and vetting strategies to enable more multi-family housing, affordable housing, and ADUs in Piedmont while retaining and enhancing the City's beautiful neighborhoods, high-quality homes, attractive parks, and small-town charm.

Commitment to Client Service

LWC believes project success is based on clear and effective communication with City Staff and a commitment to delivering the project on time and within budget. As a 19-person firm, LWC is capable of managing large, complex projects while maintaining a swift response time and personalized attention to client needs. LWC will communicate with City staff on a regular basis to review and evaluate project status and ensure expectations are met. We will leverage our experience in Piedmont and understanding of community sentiment gained from public meetings/workshops, close collaboration with City Staff, hours of meetings with the City Council and Planning Commission, and an extensive online survey on the community's perspective of residential design standards.



The Community means: residents, property owners, business owners and operators, special interest groups and organizations, Housing Advisory Committee, Planning Commission and City Council.



Scope of Work and Deliverables

Scope of Work

The Scope of Services in this proposal varies slightly from the RFP but contains all the tasks and deliverables identified by the City and required by the State for certification. The proposed framework is based on LWC's experience and lessons learned from 8 Housing Element Updates in the 6th Cycle and over 20 certified Housing Element Updates in the 4th and 5th Cycles. The sequence of tasks, as presented will facilitate tracking and prioritization of milestones and meetings and the review, evaluation and editing of data and draft documents as well as to better assure the adherence with certification deadlines. We remain available to work with the City to refine the Scope of Services or other parts of the proposal to meet the City's needs and expectations.

Task 1: Project Management and Coordination

Task 1.1: Kick-Off Meeting

The Consultant Team will prepare for and attend one kickoff meeting (via video or teleconference) with City staff. The meeting objectives are to:

- Confirm project goals and objectives.
- Refine the work program and finalize project schedule.
- Review outreach opportunities and discuss the outreach strategy.
- Identify stakeholder (groups and individuals).
- Clarify the roles and responsibilities of all parties.
- Establish communication protocol.
- Identify and share project-related information
- Identify major milestones and dates for deliverables.

Task 1.2: Data Collection

LWC will identify and gather key information, reports, maps, and databases, as well as submit a data request to the City for relevant material. Plan to Place will research background material related to previous outreach engagement activities, interest groups, and project related material in preparation of producing a tailored engagement strategy.

Task 1.3: Project Management and Coordination

LWC will maintain a close working relationship with the City, through open and frequent email, phone, and videoconference communication. Monthly calls, or bi-weekly when appropriate, will be scheduled with the Consultant Team and City staff to provide status updates and collaborate on key issues and strategies. LWC anticipates all meetings will be held virtually through the duration of the project. In person meetings will incur additional fee.

LWC will provide monthly progress memos to communicate project status updates and/or technical information. LWC will also maintain the project schedule and regularly update the team as revisions occur to ensure adherence to deadlines. This task also includes LWC's coordination and project

Scope of Work and Deliverables

administration not included in other tasks, such as ongoing internal coordination of the Consultant Team, supporting City staff in preparation of resolutions and other meeting materials, creating and maintaining an internet-based project share folder.

Task 1.4: Coordination with HCD

LWC will support the City during State review of the Public Draft Housing Element and assist the City in certification for the three months after adoption by City Council. LWC will work closely with HCD and the City to ensure the draft Housing Element complies with State requirements and will recommend modifications as needed and directed by the HCD to be considered certifiable upon adoption. LWC will track HCD comments and edits in response to comments during the 60-day review. LWC will participate in one conference call with HCD and respond to one round of HCD edits, if needed, after adoption to support the City in certification. LWC recommends initiating communication with HCD early in the process and contacting HCD when relevant questions or ambiguities arise.

Task 1 Deliverables:

- *Regular calls (minimum 10) with staff, agendas, and summary action notes (Word)*
- *Progress reports (Email)*
- *Kickoff meeting agenda and summary notes (Word)*
- *Refined project schedule documenting key milestones and deliverables (PDF)*
- *Document/data request*
- *Provide and maintain a shared Dropbox folder*

Task 2: Community Outreach and Engagement

Task 2.1: Engagement Strategy

Plan to Place will prepare an Engagement Strategy that will be refined throughout the project to course correct as needed. Virtual meeting platforms will be used as a foundational tool to launch the project. If the City and Consultant Team mutually agree to transition to in-person meetings, the Consultant Team will prepare a fee adjustment to account for the additional cost. The proposed outreach tasks align with the Consultant Team's understanding of the City's outreach needs, and we remain open to alternative or additional methods as appropriate, such as interactives website and mapping tools. Additional outreach activities are outlined under optional tasks. The strategy will be designed to:

- Outline project goals and objectives.
- Develop a program that will reach, educate and engage the community throughout the Housing Element update.
- Confirm schedule, format, and resources for all engagement activities through a shared live resource.

Scope of Work and Deliverables

- Identify social media outlets to reach specific audiences (e.g., Facebook, Instagram, LinkedIn along with newsletters, blogs, videos) and virtual platforms for engagement (e.g., ZOOM, Miro, Padlet, Mentimeter or equivalent) in addition traditional mailing and survey tools.
- Identify target demographic and interest groups and identify methods of communication and engagement with hard to reach groups and special needs populations.
- Confirm coordination, facilitation and communication responsibilities.

Task 2.2: Project Messaging

In an effort to set proper expectations about the project, Plan to Place will collaborate with the City staff and LWC in an iterative process to continue to evolve the project messaging templates (Fact Sheets or FAQs) that have been prepared throughout the duration of the project. This important collateral will be critical in helping identify the overall project objectives and helping provide answers to common questions, how information will be disseminated and how the input gathered will be used to inform the process. It's anticipated that City staff and the Consultant Team will continue to co-create the language for these documents, and the Plan to Place team will maintain, organize and simplify the language to ensure the messaging is up to date and user-friendly.

Task 2.3: Outreach Materials

Plan to Place has already created branding materials for this project and will use those materials to prepare outreach templates for materials that will be used to advertise upcoming events and engagement opportunities.

Task 2.4: Project Website

Plan to Place will work continue to maintain and evolve the Piedmont is Home project website that was created through collaboration with City staff to include interactive activities and ongoing updates.

The site will serve as the primary portal for the engagement effort and will include:

- Project objectives and timeline.
- Project updates and news.
- Upcoming events and meeting summaries.
- Resources.
- Opportunities to submit ideas and subscribe to project mailing lists.

Task 2.5: Housing Advisory Committee Meetings (6)

The Consultant Team will prepare for and lead a series of Public Meetings including up to six (6) meetings with the Housing Advisory Committee. The Consultant Team will prepare presentation materials for these meetings in coordination with City staff.

Scope of Work and Deliverables

Anticipated roles and responsibilities:

- Consultant Team will work with City staff to prepare an overall purpose, approach, objective and anticipated outcome of the Housing Advisory Committee Meetings.
- Plan to Place assist City in preparation of staff reports.
- Plan to Place will prepare meeting outreach materials including agendas.
- LWC and City staff will prepare presentation materials.
- Consultant Team will facilitate each meeting.
- Plan to Place will assist with meeting logistics including virtual platform set up.
- Plan to Place will prepare summary notes.

Task 2.6: Community Workshops (4)

Consultant Team will collaborate with City staff in the preparation for and execution of up to four (4) Community Workshops to provide the community and decision makers with basic knowledge focused on the Housing Element Update. The Consultant Team will be prepared to implement digital virtual meeting formats to share information about the project, answer questions and gather feedback to address community concerns. It is anticipated that live polling and other interactive tools will be used to complement virtual meeting platforms to share and gather input. Community workshops will be advertised digitally on social media platforms and the project website along with emails blasts, social media outreach and possible physical mailers mailed directly to residents if the City desires and organizes the use of that outlet. Digital and web based platforms will be optimized for mobile device use where possible.

Anticipated roles and responsibilities:

- Consultant Team will work with City staff to prepare an overall purpose, approach, objective and anticipated outcome of the community workshops.
- Plan to Place will prepare meeting materials including agendas.
- Consultant Team will facilitate each workshop and introduce interactive activities to get input on the strategies and deliverables.
- Plan to Place will assist with meeting logistics including virtual platform set up.
- Plan to Place will assist with translation of materials as needed (note that interpretation and translation services would incur an additional cost).
- Plan to Place will prepare summary notes.

Task 2.7: Planning Commission Meetings (3)

The Consultant Team will assist the City staff with the preparation for and execution of at three (3) presentations to the Planning Commission for review of the draft Housing Element and recommendation of the Housing Element Update to City Council.

Scope of Work and Deliverables

Anticipated team's roles and responsibilities:

- Consultant Team will work with City staff to develop the purpose and desired outcome for the presentation.
- Plan to Place assist City in preparation of staff reports.
- LWC and City staff will prepare presentation materials.
- Consultant Team will facilitate the discussion as needed.
- Plan to Place will prepare summary notes.

Task 2.8: City Council Meetings (3)

The Consultant Team will assist the City staff with the preparation for and execution of at three (3) presentations to the City Council for review of the draft Housing Element and adoption of the Housing Element Update.

Anticipated team's roles and responsibilities:

- Consultant Team will work with City staff to develop the purpose and desired outcome for the presentation.
- Plan to Place assist City in preparation of staff reports.
- LWC and City staff will prepare presentation materials.
- Consultant Team will facilitate the discussion as needed.
- Plan to Place will prepare summary notes.

Task 2 Deliverables:

In order to maintain flexibility and efficiency within this outreach program, the number and type of meetings specified in this task can be re-allocated by mutual agreement between the City and the consultant team.

- *Draft and final Engagement Strategy (submitted to City staff for review within sixty (60) days of contract engagement.*
- *Draft and final Project Messaging*
- *Draft and final Outreach Materials*
- *Meeting and Workshop agendas (annotated and public facing), outreach (e.g., traditional and digital postcards), and presentation materials*
- *Meeting and Workshop summary notes*
- *Project Website*

Scope of Work and Deliverables

Task 3: Housing Technical Studies and Issues Evaluation

Task 3.1: Housing and Special Housing Needs

In accordance with Government Code §65583(a), LWC will prepare an assessment of housing needs. LWC will incorporate data and content provided through ABAG's Regional Housing Technical Assistance Program as appropriate (e.g., jurisdiction-specific tables, charts, and text summaries for all required data, such as population, demographic, housing, market conditions and regional comparisons). Since this data is not available yet, this task assumes a need to tailor this content to provide a complete overview of the City's need. LWC will analyze key data characteristics and their implications to identify the City's specific housing needs and evaluate housing conditions. LWC will establish the nature and extent of housing needs for Piedmont including existing and projected housing needs (the City's 6th Housing Element cycle RHNA) and the housing needs of special groups.

Key data characteristics include:

- Demographics (e.g., age, race/ethnicity, population growth, employment trends).
- Household size, tenure, and income (by race and ethnicity).
- Housing stock characteristics (e.g., type, vacancy, age/condition, and cost/affordability, including what households are most significantly impacted by costs).
- Assessment of overcrowding and cost burden.
- Special Needs (e.g., large households, persons with disabilities, elderly).

As part of this task, and in accordance with Government Code §65583(a), LWC will identify and analyze the current inventory of "affordable" multifamily rental housing units and those at-risk of converting to market-rate in the next 10 years. This analysis will include an assessment of conversion risk and an estimate of the cost of replacement versus preservation under current market conditions. LWC will also identify local entities that are qualified to acquire and manage at-risk units and local, state, and federal financing and subsidy programs to support the preservation of these at-risk units.

Task 3.2: Housing Constraints

In accordance with Government Code §65583(a), LWC will conduct a constraints analysis for the preservation, protection, or production of housing across income levels within the City. This work will build off of the ongoing services under the California SB2 grant program. LWC assumes that ABAG's Regional Housing Technical Assistance Program will provide all cross-jurisdictional comparisons necessary for this task (e.g., comparison of fees and processing time) and narratives of typical countywide non-governmental constraints, including community opposition to housing, cost of construction, limited availability of land, and other topics. This analysis will differentiate between governmental constraints (such as land use, zoning regulations, and impact fees), non-governmental constraints (such as cost of construction, availability of land, community opposition to housing, mortgage lending availability), and environmental constraints to inform the most effective and appropriate policies to reduce constraints and facilitate housing production.

Scope of Work and Deliverables

Task 3.3: Current Housing Element Review

LWC will review the City's current Housing Element, Annual Housing Element Progress Reports, and other supporting materials to gain an understanding of Piedmont's housing production progress. This review will include an evaluation of previous housing policies and programs, including a summary of the progress towards meeting its goals (e.g., discussing goals, policies, or programs that are in progress, have been abandoned, or have not proven effective). As part of this task, and related to Task 4, LWC will Review the 5th Cycle sites inventory and identify sites that remain suitable for use in the 6th Cycle, in light of new State requirements for recycled sites.

Task 3.4: Housing Resources Assessment

In accordance with Government Code §65583(a), LWC will identify programmatic and financial housing resources. The analysis will include a review of funding sources for housing development and improvement, regulatory incentives for affordable housing, and opportunities for residential energy conservation.

Task 3.5: Goals, Policies, Programs and Quantified Objectives

In accordance with Government Code §65583(b), LWC will produce an implementation plan that outlines policies and programs that will satisfy the City's housing for the eight-year planning period, including quantifiable objectives and programs that address the City's RHNA and effectively respond to the housing needs, constraints, and key priorities identified through the update process. This plan will include revisions to existing Housing Element goals, policies, and programs as appropriate, and will provide actionable steps the City is already taking or will undertake to accommodate its housing need.

Task 3 Deliverables:

Analysis from Task 3 will be included in Task 7.1 (Administrative Draft Housing Element)

Task 4: Sites Inventory

Task 4.1: Housing Program Options

In accordance with Government Code §65583(a)(3) and §65583.2, in collaboration with City staff, LWC will prepare an inventory of candidate residential land suitable for residential development, including vacant sites and sites having the potential for redevelopment, consistent with HCD's requirements. This includes identifying safe assumptions (such as realistic density), evaluating sites, and analyzing potential policy strategies to increase site capacity, and demonstrating development viability (per State law). The assessment will also include an analysis of the availability of infrastructure for sites included in the inventory. As part of this task, LWC will review recent multi-family project applications to determine realistic achievable densities to support the sites analysis. LWC will work closely with City staff to develop the assumptions and methodology for this inventory and produce a parcel-level inventory of sites with near-term residential development potential at appropriate densities. LWC will prepare an assumptions and methodology memo for review with City staff. LWC will utilize the ABAG Housing Element Site Selection Tool to the extent feasible and build off of the ongoing services under the California SB2 grant program.

Scope of Work and Deliverables

LWC will work with City staff to analyze potential policy strategies to increase site capacity (e.g., amending development standards and densities at key housing opportunity sites, etc.). The sites inventory is scheduled early in the process to ensure adequate time for consideration of potential changes to development standards and capacities needed to achieve the RHNA.

This task assumes the City will provide adequate citywide parcel-level GIS data (including APN, address, parcel size, existing use, ownership, General Plan land use designation, zoning, land value, improvement value, and building square footage) to LWC.

Task 4.2: Sites Inventory Regional Housing Needs Assessment

Based on community input and staff direction on a preferred sites inventory, LWC will prepare the adequate sites inventory section of the Housing Element, demonstrating how Piedmont will satisfy its RHNA in each income category. Pursuant to SB 6, LWC will prepare an electronic copy of the residential land inventory using HCD's Electronic Housing Element Sites Inventory Form, upon Housing Element adoption. LWC and City staff will work closely with HCD to ensure the sites inventory complies with HCD requirements.

Task 4.3: Visualizations

LWC will generate visualization and massing graphics demonstrating the potential housing types and densities allowed under any recommended program, where they differ from current density and height. These graphics are site specific and limited to 3 sample sites and 2 scenarios for each site.

Task 4 Deliverables:

- *Residential Land Inventory Assumptions and Methodology Memo (draft and final - Word)*
- *Updated Residential Land Inventory Map and Table (draft. final will be included in the Administrative Draft Housing Element)*
- *Completed Electronic Housing Element Sites Inventory Form (included in the Final Adopted Housing Element)*
- *Visualizations (jpeg)*

Task 5: Affirmatively Furthering Fair Housing

Task 5.1: Affirmatively Furthering Fair Housing

Consistent with State law, LWC will include an Assessment of Fair Housing (AFH) in the Housing Element. This work will build off of the ongoing services under the California SB2 grant program. This will be considered during the sites inventory and preparation of goals, policies, and programs to combat discrimination, overcome patterns of segregation, and foster inclusive communities. This assessment will be included in the Administrative Draft Housing Element for City review. LWC will use the HCD recommend methodology, which is anticipated to be issued in Summer 2021.

Task 5 Deliverables:

- *Assessment from Task 5 will be included in Task 7.1 (Administrative Draft Housing Element)*

Scope of Work and Deliverables

Task 6: General Plan Amendments

Task 6.1: Environmental Hazards Element and Natural Resources and Sustainability Element Amendments

Based on an evaluation of the current General Plan, issues and opportunities identified as part of a legislative analysis, and in conjunction with the Housing Element Update, Rincon Consultants will prepare revisions to existing, and/or propose new, Environmental Hazards Element and Natural Resources and Sustainability Element goals, policies, and actions, as appropriate. This effort will focus on refinements and updates to address key policy topics and new state mandates and guidelines. As part of this task, Rincon will participate in one meeting with City staff to discuss the amendments, including priorities, issue and desired revisions.

Natural Resources and Sustainability Element. The Natural Resources and Sustainability Element provides a framework for the protection of natural resources of the earth, air, water, and wildlife such as soils, biological resources, mineral deposits, water, natural landscape preservation and visual resources, air quality, and cultural resources. As an element focused on the preservation of the natural environment, it also promotes sustainability with policies focused on sustainable development, energy efficiency, waste reduction, and other sustainability initiatives. Rincon will review and update the Natural Resources and Sustainability Element as needed to identify rivers, creeks, streams, flood corridors, riparian habitats, and land that may accommodate floodwater for purposes of groundwater recharge and stormwater management, as required by AB 162.

Environmental Hazards Element. The focus of the Environmental Hazards Element is to provide a summary of the natural and manmade hazards facing Piedmont and identify policies that will mitigate or eliminate loss of life, economic and social dislocation, and property damage. As part of the Housing Element update, Rincon Consultants will review and update the Environmental Hazards Element to reflect and incorporate the current Piedmont Local Hazard Mitigation Plan, including incorporating the citywide analysis and Vulnerability Assessment in accordance with SB 379 to provide policies and programs that avoid and/or mitigate the risk associated with climate change. Rincon will also ensure that the Environmental Hazards Element is in compliance with recent State requirements pertaining to wildfire risk reduction (SB 1241) and climate adaptation planning (SB 379), as well as the recently passed legislation requiring evaluation of emergency evacuation routes (SB 747 and SB 99) and consultation with the State Board of Forestry (SB 3065). We will focus on updating the Element to bring it into compliance with recent State legislation and consistency with the Housing Element Update/ The following table outlines the methods used to address each concern.

Rincon will utilize the City's existing format, layout, and style to amend the General Plan. Rincon will edit General Plan Elements as Word files in track changes before converting the document to another format. If Word files are not available, Rincon will work with the City to establish the best method for these amendments. Rincon anticipates up to two rounds of review of the amendments. Each draft will be submitted electronically, and we will address one set of compiled, tracked changes from the City.

Scope of Work and Deliverables

Hazard Type	Main Concern	How Rincon Will Assess	Existing Resources
Natural Hazards			
Seismic risks	Housing Element updates that pertain to residential areas susceptible to fault rupture, ground shaking, dam failure, subsidence, liquefaction.	Utilize most recent seismic information to map risks throughout City. Evaluate whether current City policies need to be updated to address new areas of risk or be consistent with updated State Guidelines.	California Geological Survey Mapping Alquist Priolo Fault Map General Plan Guidelines Mapping Tool
Flooding	Housing Element updates that pertain to residential areas in flood zones.	Identify known areas vulnerable to flooding and review and potentially update city-wide flood policies.	FEMA Mapping General Plan Guidelines Mapping Tool
Wildland and Urban Fires	Housing Element updates that pertain to residential areas in high wildfire hazard areas.	Identify fire hazards zones and coordinate with surrounding cities and Alameda County regarding potential emergency communication policies and protocol.	CalFire Mapping Alameda County Fire Mapping
Climate Change Effects	Climate change may the risk associated with extreme heat, drought, and air quality pollution.	Review climate change modeling provided by CalAdapt and determine if any information gaps exist and need to be supplemented with other resources.	CalAdapt Piedmont 2019 Local Hazard Mitigation Plan
Human-Related Hazards			
Hazardous Waste	Housing Element updates that pertain to hazardous waste sites.	Cross-reference hazardous waste sites and Hazardous emission generators (such as from AB 2588 Toxic Hot Spots inventory) with proposed housing sites.	SWCRB's Geotracker Database DTSC's EnviroStor Database Cortese List
Peak Load Water Supply Requirements	The delivery of peak water load may stress the integrity or capacity of existing water supply infrastructure.	Characterize existing water supply infrastructure, including age and size of storage and transmission facilities. Assess how existing infrastructure is accommodated to facilitate peak load water supply demand.	Local water purveyors
Evacuation Routes	Sufficient evacuation capacity and protocol	Review existing evacuation plans and work with City staff to assess evacuation needs.	Piedmont 2019 Local Hazard Mitigation Plan

Task 6.2: Other Text Amendments

LWC will review the other elements of the General Plan, such as the Land Use Element and the Design and Preservation Element, and identify other amendments needed to make them consistent with the Housing Element. LWC will summarize recommended amendments in a concise memo (in table format). It is assumed that any General Plan amendments would occur concurrent with the adoption of the Housing Element.

Scope of Work and Deliverables

Task 6.3: Capacity Recommendations

Based on the site analysis, LWC will work with City staff to identify potential areas or parcels for Changes in entitlements, as necessary, to meet the City's RHNA. LWC will summarize recommendations in a concise memo (table/map format), including General Plan land use map amendments needed. LWC understands the City intends to initiate any changes to the municipal code at the time of the Housing Element adoption. Due to the potential requirement for a citizen vote on issues identified in the city's charter, LWC will support the City until Housing Element adoption.

Task 6 Deliverables:

- *Amendments to the Environmental Hazards (Safety) Element of the City's General Plan to be consistent with SB 379 (Word, PDF)*
- *Amendments to the Natural Resources and Sustainability (Conservation) Element of the City's General Plan as needed to comply with Government Codes section 65302(d)(3) (Word, PDF)*
- *General Plan Text Amendment Recommendations Memo (draft and final) (Word, PDF)*
- *Recommendations Memo (Word, PDF)*

Task 7: Draft Housing Element and Public Meetings

Task 7.1: Housing Element Outline

LWC will prepare an outline of the Housing Element, and any appendices, for City review and comment. The document will be prepared in Word, in a style and format consistent with the City's General Plan. LWC assumes the City will provide a Word version of the General Plan to base the Housing Element template from.

Task 7.2: Administrative Draft Housing Element (2)

LWC will prepare an Administrative Draft Housing Element for City staff review, consistent with the agreed upon approach in Task 7.1. LWC will prepare a revised Administrative Draft Housing Element (and associated appendices and amendments) for staff review. LWC will revise Admin Draft #1 and prepare Admin Draft #2 for City review. For Housing Element Update drafts, LWC assumes City staff will submit a single set of non-conflicting comments for LWC to incorporate into the next version.

Task 7.3: Public Housing Element Drafts (3)

LWC will prepare a Public Review Draft (PRD) Housing Element, incorporating comments from City staff on the Administrative Draft, and present to the Housing Advisory Committee, Planning Commission, and City Council at public hearings (via Zoom or other online platform). LWC will summarize suggested edits from each hearing to present to the subsequent review body for consideration. LWC will track revisions, prepare addendums, and, if proposed changes warrant a revised draft, LWC will prepare up to two revised Public Review Draft Housing Elements.

As part of the development of the Administrative and Public Housing Element Drafts, the Consultant Team will facilitate a minimum 10 public engagement opportunities (See Task 2)

Scope of Work and Deliverables

Task 7.4: HCD Review Draft Housing Element

LWC will revise the PRD in response to feedback from City staff, the HAC, Planning Commission, and City Council. LWC will submit this revised draft to HCD for the 60-day review.

Task 7 Deliverables:

- *Administrative Draft Housing Element (2 versions) (1 hard copy, 1 electronic copy, Word, PDF)*
- *Public Review Draft Housing Element (3 versions) (1 hard copy, 1 electronic copy, Word, PDF)*
- *HCD Review Draft Housing Element (1 hard copy, 1 electronic copy, Word, PDF)*

Task 8: Final Draft Meetings, Final Adoption and Certification

Task 8.1: Draft Final Housing Element

LWC will coordinate with City staff to revise the HCD Review Draft in response to HCD comments. LWC will discuss the Draft Final Housing Element with HCD to ensure the draft is considered 'certifiable' by HCD. LWC will present the Final Draft Housing Element to the Housing Advisory Committee, Planning Commission, and City Council at public hearings (See Task 2).

Task 8.2: Final Housing Element and Certification

LWC will make revisions directed by Planning Commission and City Council and, upon adoption of the Final Draft Housing Element and Final General Plan amendments and other regulatory amendments by the City Council, LWC will prepare a final adopted version with the date of adoption prominently displayed on the front cover and throughout the document to distinguish it as the official document from other versions of the Housing Element. LWC will submit the Final Adopted Housing Element to HCD for certification and to the water/sewer district and the California Office of Planning and Research.

Task 8 Deliverables:

- *Draft Final Housing Element (10 bound hard copies, 1 electronic copy, Word, PDF)*
- *Final Adopted Housing Element (10 bound hard copies, 1 electronic copy, Word, PDF)*

Task 9: Additional Tasks

Task 9.1: AB 1851 Sites

LWC will identify large parcels within Piedmont that could potentially be utilized to implement AB 1851 (Religious institutions affiliated housing – Yes in God's Back Yard (YIGBY)). LWC will also draft policies to facilitate implementation of AB 1851. LWC will work with City staff to determine appropriate timing of this task, but it may be conducted concurrently with the sites inventory analysis and development of goals, policies, programs, and quantified objectives.

Task 9 Deliverables:

- *AB 1851 sites map (draft and final) (PDF)*

Scope of Work and Deliverables

Optional Tasks

Stakeholder/Focus Group Meetings (6)

The Consultant Team will prepare for and facilitate up to six (6) up to two-hour stakeholder/focus group meetings during the Housing Element Update process, all ideally scheduled in a 2-3 day timeframe. The meetings will include members identified by the City that may include experts in housing, specific non-profits, developers, community groups and community members. These stakeholders identified will act as a conduit to segments of the community that may be difficult to access. As potential community partners, stakeholders can help share accurate project messaging and encourage typically unrepresented members of the community to attend community-wide meetings.

It is anticipated that this meeting will be facilitated (using hand raising, chat and whiteboard functions) through a virtual meeting platform such as Zoom.

Anticipated roles and responsibilities:

- City staff to identify stakeholders and meeting formats (one-on-one or focus groups).
- City staff to coordinate stakeholder meeting schedules.
- Plan to Place will work with City staff to draft meeting objectives and agendas.
- Consultant Team to prepare for and facilitate meetings.
- Plan to Place will assist with meeting logistics related to the virtual platform set up.
- Plan to Place will summarize the key takeaways from each meeting.
- Plan to Place will assist with translation of materials as needed (note that interpretation and translation services would incur an additional cost).

Surveys (1)

The Consultant Team will collaborate with the City staff on initial intent and content for a survey and assist in preparing and analyzing the survey to extend the reach of the engagement effort. It is assumed that LWC will lead the survey preparation with Plan to Place's support. Particularly during the Covid-19 pandemic, the on-line surveys will provide a convenient and interactive access to the project and mirror other engagement activities. Surveys are anticipated to be administered and analyzed through SurveyMonkey, Google Forms, or an equivalent software. Access to these surveys can be advertised on the City's website, social media platforms, and utilizing postcard mailers with survey link and QR code.

Planning Commission and City Council Study Sessions (2)

The Consultant Team will work with City staff to prepare for and lead two (2) Study Sessions with the Planning Commission and City Council members which will most likely occur during a special meeting. These Study Sessions with can occur with both bodies concurrently or each body independently and can occur during the same work periods as the development of the administrative draft or during review of the draft element. Plan to Place will work with LWC to prepare materials for study sessions in coordination with City staff.

Scope of Work and Deliverables

Anticipated roles and responsibilities:

- Consultant Team will work with City staff to prepare an overall purpose, approach, objective and anticipated outcome of the Study Sessions.
- Plan to Place assist City in preparation of staff reports
- LWC and City staff will prepare presentation materials.
- Plan to Place will prepare outreach materials including agendas.
- Consultant Team will facilitate each workshop.
- Plan to Place will assist with meeting logistics including virtual platform set up.
- Plan to Place will prepare summary notes.

Tailoring of ABAG Regional Housing Technical Assistance Content

If needed, LWC will tailor data and content that will be provided through ABAG's Regional Housing Technical Assistance Program as appropriate (e.g., jurisdiction-specific tables, charts, and text summaries for all required data, such as population, demographic, housing, market conditions and regional comparisons).

Fiscal Impact Analysis

Based on the Housing Element recommendations and new capacities that would be required to meet the City's RHNA allocation, LWC will prepare a fiscal impact analysis focusing on the tax revenues and expenditures that impact the general fund accounts of the City of Piedmont. This model will determine the net fiscal impacts based on existing fiscal policies and current year expenditures. The model will illustrate the effect of annual operations in terms of the following direct impacts:

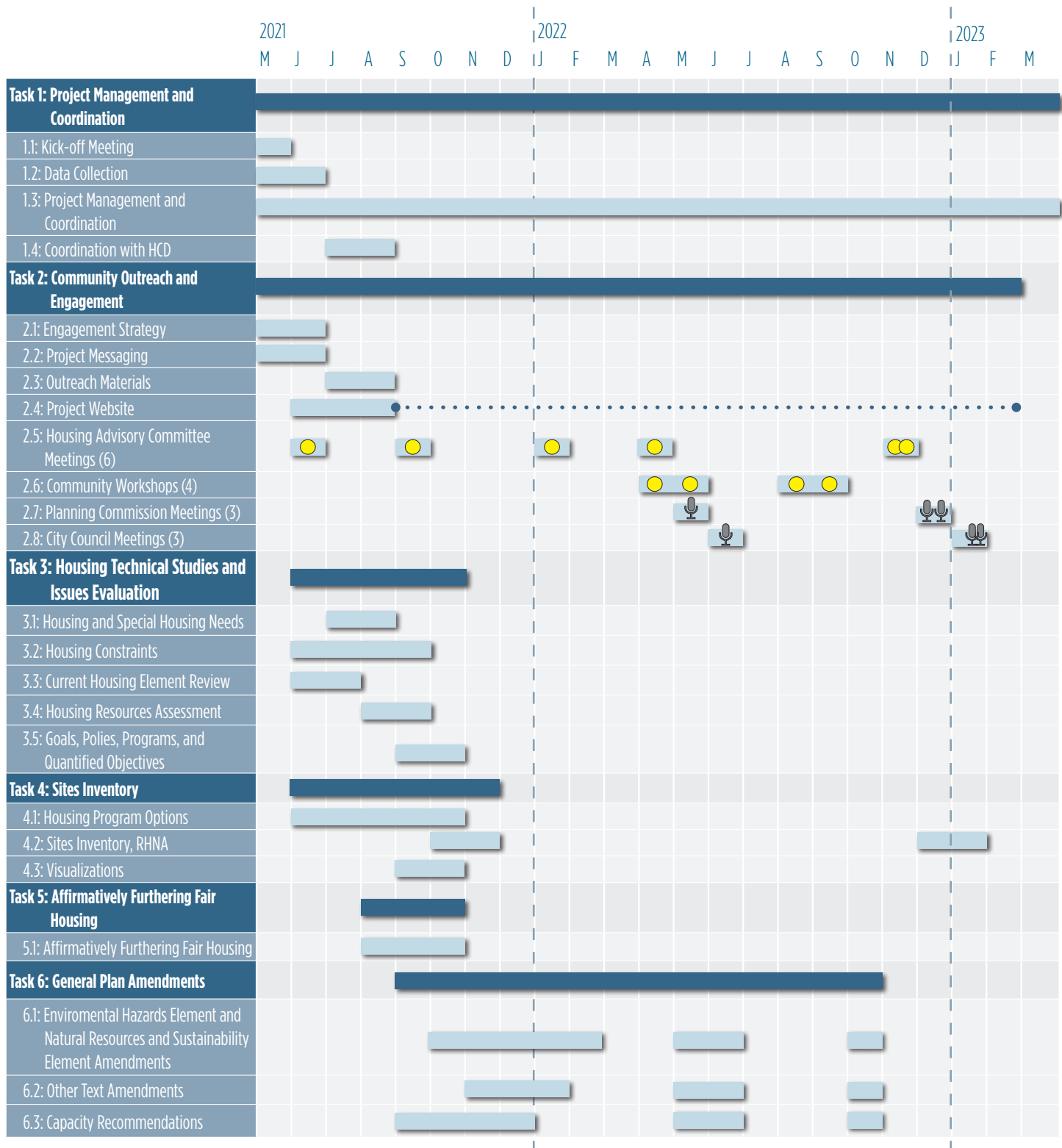
- Sales taxes
- Utility user taxes
- Business license tax
- Property taxes
- Others, as appropriate

This analysis will focus only on General Fund revenues. Other taxing jurisdictions and, enterprise funds or special districts, such as school districts, etc, could be analyzed for an additional fee.

Informational Videos

Working collaboratively LWC and Plan to Place will prepare short one to five minute videos that can be used to communicate housing element topics and or include interviews with community members on housing issues for inclusion the social media and web based outreach for the project. These videos will be prepared as high definition files that will also be suitable for use on the City's public access TV channel.

Schedule



Deliverable



Public Meetings



Public Hearings

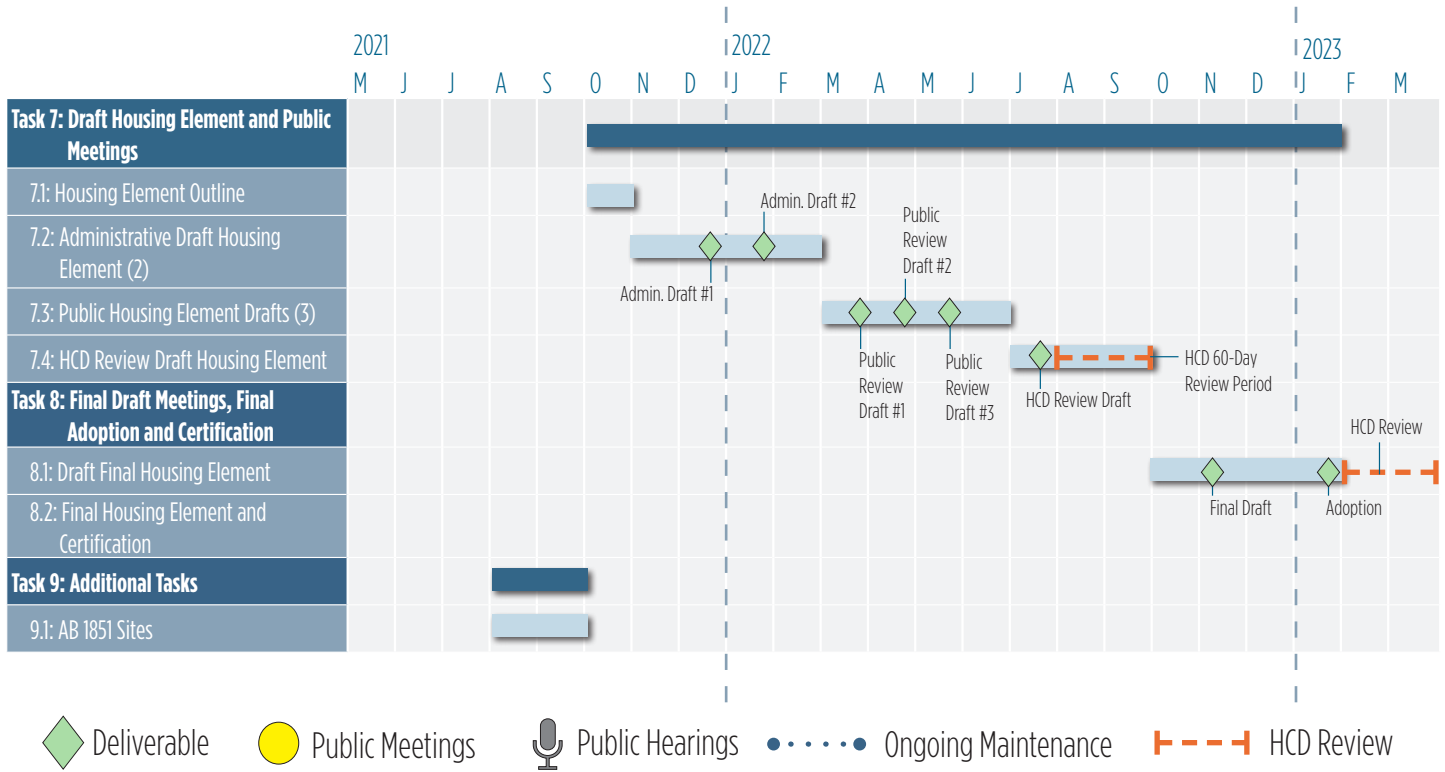


Ongoing Maintenance



HCD Review

Schedule



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3

Consultant Identification and Team

Firm Profile

Lisa Wise Consulting, Inc. (LWC)

LWC is an urban planning and economics firm that specializes in preparing feasible, equitable housing strategies and modern zoning codes that facilitate sustainable, well-designed places to live, work, and recreate. LWC has a strong resume in housing policy and implementation, zoning code updates, land use economics, real estate finance, and fiscal analysis, with a constant focus on community involvement and feasible implementation.



LWC Core Capabilities:

- Housing Element Updates, Affordable Housing, and Anti-Displacement Strategies
- Inclusionary Housing Ordinances, Density Bonus Programs, Objective Design Standards
- Public Engagement, Visioning, and Community Consensus Modeling
- Zoning Ordinances, Development Codes, and Form-Based Codes
- Specific Plans, Master Plans, and Community Plans
- Market Analyses, Revitalization Strategies, and Financial Feasibility Studies

LWC was founded in 2006, and has grown to a staff of 19 with offices in San Francisco, San Luis Obispo and Los Angeles. LWC is a Disadvantaged Business Enterprise (DBE) in California and a certified California Small Business Enterprise (SBE).

Our work is grounded in extensive coordination with city staff, civic leaders, elected officials, and the community, as well as in thorough, objective research and best practice analysis. Each LWC project is unique, and reflects the needs, desires, character, and economic realities of the community.

LWC - Plan to Place Partnership

LWC and Plan to Place are currently working closely in Piedmont and in Marin County with 10 jurisdictions to develop Objective Design Standards. Joining forces on this project will enable us to conduct an inclusive outreach with multiple opportunities for public participation and tracking project progress.



LWC - Rincon Partnership

LWC and Rincon have been working closely and consistently for over 10 years. Our partnership includes 6th Cycle Housing Element Updates in Santa Maria, Temple City, San Gabriel, Los Altos, and Woodland as well as code updates, specific plans and Objective Design Standards projects. Our practiced communication, mutual trust, and protocol for creating and refining project deliverables will enable us to work quickly and efficiently in Piedmont.



Firm Profile



Plan to Place

Plan to Place is a community engagement and communication firm based in Marin County. At Plan to Place we value highly collaborative and inclusive community-based, neighborhood and urban planning efforts. As a full-service engagement firm, we are continually exploring and innovating new outreach tools that are tailored to meet the needs of our clients and the communities we work with. We implement an array of communication, facilitation and engagement platforms designed to provide access to a wide range of participants.

Plan to Place specializes in:

- Comprehensive community engagement strategies
- Customized outreach tools that spark imagination and intrigue
- Interactive and approachable visioning exercises
- Inclusive processes that prioritize equitable integration of all voices and aspirations
- Genuine and active listening to and empowering of stakeholders
- Creative community-facing design and branding
- Thoughtful translation of complex planning challenges into collaborative community-supported actions

Rincon Consultants, Inc.



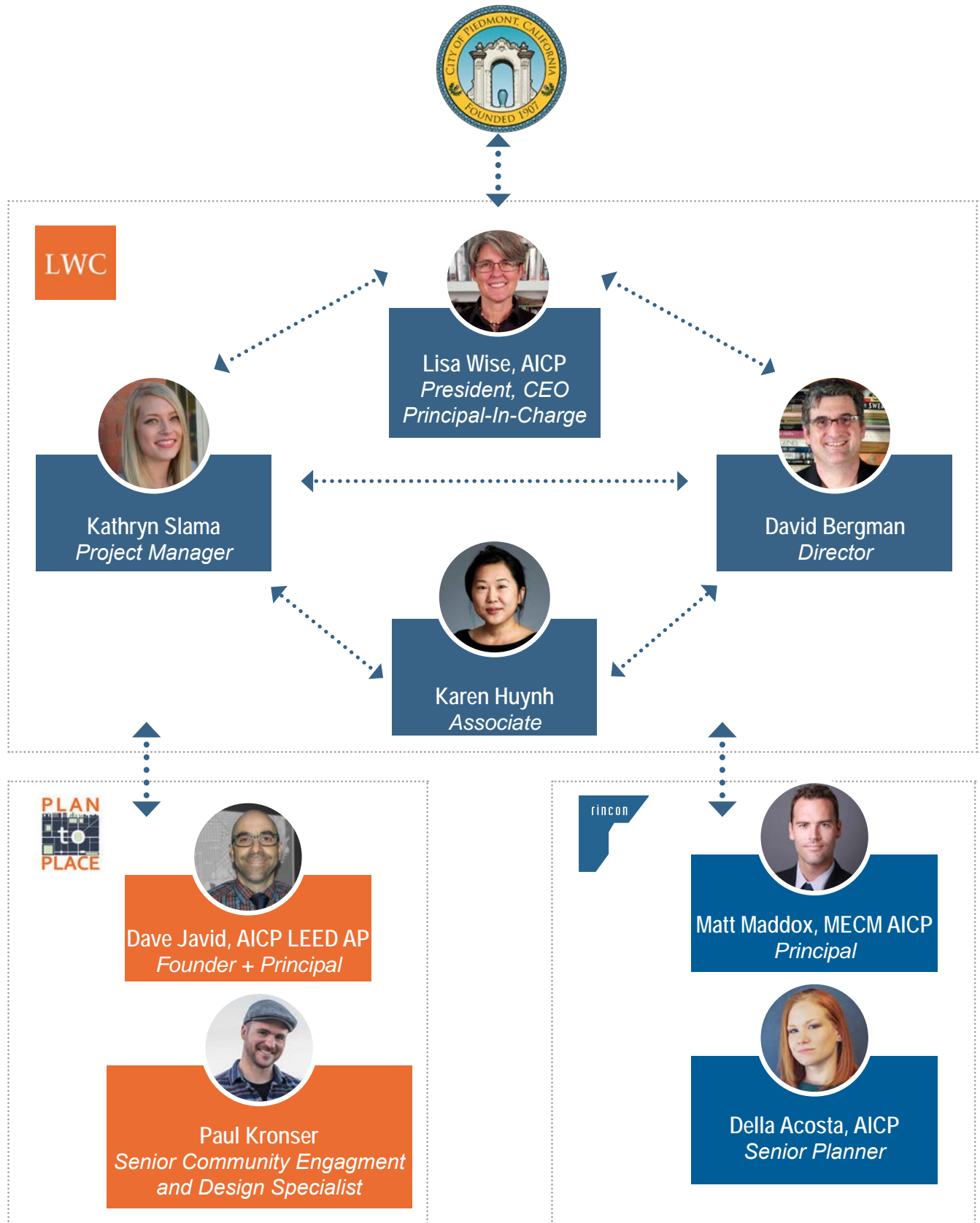
Rincon Consultants is a multi-disciplinary environmental science, planning, and engineering consulting firm that provides quality professional services to government and industry. Our principal service is to provide land use planning, hazard mitigation, and environmental policy and planning support to create and sustain innovative solutions to social, sustainability, and environmental issues. Rincon prides itself on the considerable depth of its staff, which includes certified urban planners, sustainability experts, environmental scientists and engineers, accredited LEED professionals, and specialists in areas such as comprehensive planning, land use policy, housing, hazard mitigation, cultural resources, climate change, noise, and air quality.

We have categorized our environmental consulting services into six core areas:

- Land Use and Environmental Planning
- Sustainability and Hazard Mitigation Services
- Cultural Resources
- Biological Resources
- Water Resources
- Site Assessment and Remediation

We also maintain a Geographic Information Systems (GIS) and Graphics Communications group to enhance our documents and support our data analyses.

Organizational Chart



Project Team

Lisa Wise Consulting, Inc. (LWC)

Lisa Wise | AICP, CPA (inactive) | President, CEO



As a certified planner, Lisa has over 30 years of professional experience in housing policy, zoning codes, economic development strategies, financial analysis and managing complex engagements. Lisa is considered a national expert on housing policy and code reform and presents on the topics regularly at State and National APA, League of California Cities, ULI and the New Partners for Smart Growth conferences. Lisa is adjunct faculty at the California Polytechnic State University in San Luis Obispo focusing on courses in housing and real estate finance. Lisa has been directly responsible for over 20 housing policy engagements, 34 code updates, 23 master and specific plans, and 35 economic projects. Lisa holds a Master's degree in City and Regional Planning from California Polytechnic State University, San Luis Obispo, Master's in Accountancy from DePaul University in Chicago and a Bachelor of Science in Business Administration from University of Cincinnati.

Role: As the **Owner and President** of LWC, Lisa will be ultimately responsible for LWC's adherence to scope, budget, timeline and to the tenets of the contract. Lisa will work closely with David Bergman (Project Director) and Kathryn Slama (Project Manager) to guide LWC's approach and review and approval of final deliverables.

David Bergman | Director



With over 25 years of experience, David has focused on community development, real estate and urban planning projects, with an emphasis on the formation and implementation of urban and regional development strategies, and public-private partnerships. David's strengths and expertise include public policy and alternatives analysis that balance economic feasibility, fiscal performance and community vision. He also brings an understanding of California Housing Law, earned working directly with California cities and counties on the identification and assessment of financing options for affordable housing, student and workforce housing and inclusionary housing, and strategies for improved jobs/housing balance and anti-displacement programs. As the Director of Planning for the City of South Pasadena, he oversaw the successful approval of the City's first density bonus application and adoption of an Accessory Dwelling Unit (ADU) Ordinance, that was approved by the California Department of Housing and Community Development (HCD). David holds a Master of Geography and Urban Planning from the University of California, Los Angeles, and a Bachelor of Arts degree in Geography and Classical History from the University of Wisconsin in Madison.

Role: David will serve as **Project Director**, working closely with Kathryn Slama (Project Manager) and Karen Huynh (Associate) to set the framework for deliverables, guide technical analysis, review draft documents, and track project milestones and performance.

Project Team

Lisa Wise Consulting, Inc. (LWC)

Kahtyrn Slama | Senior Associate - Project Manager

Kathryn has over seven years of hands-on housing, zoning code, specific plan, and project management experience, and leads the team on housing policy, detailed policy and regulatory analysis, formulation of implementation strategies, and streamlined zoning codes. Kathryn has led HCD-certified Housing Element Updates in Richmond, Livermore, Benicia, Arroyo Grande, Atascadero. She is familiar with the heightened demands of the 6th Cycle, currently Project Manager of Housing Element Updates in Woodland, Long Beach, and Coachella. Kathryn holds a Master of City and Regional Planning degree from California Polytechnic State University, San Luis Obispo and a Bachelor of Arts degree in Environmental Studies from University of California, Santa Barbara.



Role: As **Project Manager**, Kathryn will be responsible for day-to-day communication with the City. She will work closely with David Bergman, Karen Huynh, and LWC staff to conduct site analyses, technical studies, housing needs assessment, constraints analysis, implementation plan, facilitate public hearings and coordinate the certification with the HCD. Kahtyrn will be responsible for ensuring deliverables are complete, accurate, and submitted on time and within budget to meet and exceed client expectations. She will also work with the LWC Business Manager to assure invoices are complete, correct, and timely.

Karen Huynh | Associate

Karen brings 10 years of experience to LWC in affordable housing, real estate finance, land use economics, and fiscal analysis. She has a deep understanding of local government program management, funding, and implementation. Her strengths include housing feasibility studies, market analysis, housing policy analysis as well as fiscal impact analysis, development feasibility, and community engagement techniques. Karen holds a Master of Public Policy degree from University of California, Berkeley, where she specialized in homelessness/housing policy and economic inequality and a Bachelor of Arts degree in Neuroscience from Columbia University.



Role: As **Project Associate**, Karen will work closely with Kathryn Slama to review and summarize archival documents, conduct socio-economic research and policy assessment, evaluate existing programs, prepare materials for outreach events, and develop draft deliverables and informative and attractive graphics. Karen will also be responsible for project file management and archiving.

Project Team

Plan to Place

Dave Javid | Founder + Principal



Dave from Plan to Place will be the primary point of contact among the Plan to Place team and LWC and City staff to review strategy, timeline and deliverables. Dave has over 18 years of experience leading a diverse range of award-winning community-based planning efforts. Dave's experience as a project manager on vision, corridor, strategic specific plan and placemaking projects has provided invaluable insight on the opportunities and the challenges of balancing client objectives while meeting community expectations. By implementing a range of engagement and communication platforms, Dave has forged relationships with key community leaders to establish partnerships and a common dialogue that has led to successful policy outcomes.

Paul Kronser | Sr. Community Engagement and Design Specialist



Paul will collaborate with the project team on outreach materials templates along with assisting with facilitating meeting activities. Paul has over 10 years of experience in planning, urban design and community engagement. He has lead community outreach efforts to engage the public on various projects ranging from high density urban developments to rural active transportation grants. His experience has allowed him to gather skills in various community engagement methods, creating productive conversations around key issues facing communities today.

Rachael Sharkland | Outreach and Urban Design Specialist



Rachael will collaborate with the project team to prepare outreach materials and assist with preparation and summary of meetings and forums. Rachael has 8 years of experience working as a researcher, designer, and project manager on complex urban design projects including masterplans for higher education and health campuses and civic design and transit guidelines. Her background in performance and ecology inform her reverence for a holistic and participatory design process grounded in an ethics of resilience, equity, empathy, and agency.

Rincon Consultants, Inc.

Matt Maddox | MESM AICP | Principal



Mr. Maddox is involved in a wide range of urban planning and land use studies, sustainable, resilient and adaptation policy development, air quality and greenhouse gas analysis, community involvement and permitting activities. He has a strong background in sustainability and resiliency planning, policy, and the safety and natural resource related elements of the general plan. He has contributed to successful planning projects ranging from general plans to focused inner city redevelopment studies, to climate action plans and documentation for compliance with environmental regulations, to greenhouse gas emissions analysis for industrial facilities.

Project Team

Rincon Consultants, Inc.

Della Acosta | AICP | Senior Planner

Della Acosta is a long-range planner with experience managing comprehensive and technical general plan updates, zoning and municipal code updates, community engagement programs, and other land use planning projects, including numerous Safety Element, Conservation Element, and other natural resources components of the general plan. She has managed updates for numerous general plan updates across California and specializes in developing policy that achieves the community vision while fulfilling necessary regional, state, and federal requirements in ways that are contextual and implementable. She is currently leading general plan, housing and land use, and zoning projects around the State, helping jurisdictions achieve local goals and comply with State legislation on housing, transportation, climate adaptation and natural hazard mitigation, and GHG reduction.



April Durham | Policy/Outreach

April Durham, PhD is an environmental and urban planner with expertise in public outreach experiences range from those with small communities to those conducted in larger cities and with regional jurisdictions and develops and implements innovative approaches to connecting stakeholders who have diverse perspectives and interests. She uses online platforms and social media outlets that reach a broad audience and can draw in especially invested stakeholders through their blogs, social media pages, and other venues. She also develops collaborative outreach projects, involving artists, writers, naturalists, and others who can help projects meet public involvement requirements with success.



Torin Snyder | PG, CHG, TOR, QSD/P | Geologist

Mr. Snyder is a professional geologist with over 20 years of experience, which includes working in a variety of geological conditions throughout California. His experience includes hydrology and water quality, vadose zone hydrology environmental investigations, hydrogeology environmental investigations, hazardous waste investigations, and soil and groundwater remediation/mitigation. In addition, Mr. Snyder has prepared and implemented compliance programs set forth by Mitigation Monitoring and Reporting Plans for large infrastructure projects.



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Related Project Examples and References

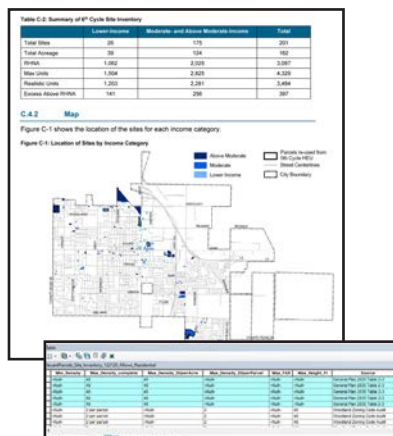
Housing Elements & Policy Development

For over 15 years, LWC has worked with cities and counties to comply with State housing law and assure eligibility for planning and implementation funding, by:

- Understanding the community vision;
- Assessing local housing needs;
- Inventorying available sites for housing development;
- Analyzing constraints to housing development;
- Proposing programs to reduce constraints, making additional sites available; and
- Attaining HCD approval.

LWC has a thorough understanding of State housing law and has worked with over 20 jurisdictions on State certification in the 4th, 5th, and 6th (current) Housing Element cycles. LWC's approach to Housing Element Updates and housing policy prioritizes streamlining the approval process, facilitating affordability and enabling a diversity of housing types that are consistent with the community vision and State Planning Priorities. LWC's approach also relies on substantive online and in-person public engagement.

LWC's housing resume also includes the assessment and development of Fair Housing Ordinances, Density Bonus Programs, Mixed use /Multifamily Objective Design Standards, Short Term Rental Ordinances and Inclusionary Housing Ordinances.



City of Woodland Housing Element Update - Vacant Land Inventory.



City of San Gabriel Housing Element Update - LWC employs graphics to communicate effectively.

HOUSING ELEMENT UPDATES & CYCLES

Arroyo Grande	4th & 5th
Atascadero	4th & 5th
Beaumont	6th
Benicia	4th & 5th
Coachella	6th
El Dorado	4th
Grover Beach	4th
King City	4th
Livermore	5th
Long Beach	6th
Loomis	3rd, 4th, & 5th
Monte Sereno	4th
Pacific Grove	4th
Pismo Beach	4th
Placer County	4th
Pleasanton	6th
Richmond	4th & 5th
San Gabriel	6th
Santa Maria	6th
Tehachapi	4th & 5th
Temple City	6th
Tulare	4th
Vallejo	5th
Woodland	6th

HOUSING PROGRAMS

Atascadero, CA, Equity Sharing Ability to Pay Analysis and Criteria

Richmond, CA, Fair Housing Ordinance Evaluation and Update

Livermore, CA, Development Code Update, Form-Based Code, Density Bonus Program

Mammoth Lakes, CA, Affordable Housing Conceptual Land Use Plan

St. Helena, CA, Inclusionary Housing Ordinance

LWC

CITY OF LIVERMORE

Housing Element Update, 5th Cycle

STATUS:

Adopted in March 2015 and
Certified in April 2015

TIMEFRAME:

May 2014 - April 2015

BUDGET:

\$41,000

REFERENCE:

Christine Rodrigues
Assistant to the City Manager
City of Livermore
1052 South Livermore Ave.
Livermore, CA 94550
(925) 960-4410
cnrodrigues@ci.livermore.ca.us

LWC was hired by the City of Livermore to lead the 5th Cycle update to the Housing Element for the planning period 2015 through 2022. The goals, policies, and programs of the Housing Element are designed to reduce barriers to housing development of all types and facilitate and encourage creation and preservation of affordable housing.

As part of the update, LWC assessed housing needs for all socio-economic classes in the community including special needs groups; evaluated performance and effectiveness of 4th cycle Housing Element policies and program; and identified housing resources, opportunities, and constraints. A key part of the constraints analysis was determining achievable densities to estimate City land capacity to accommodate projected growth and future housing demand. LWC was able to simplify layers of regulations, including form-based zoning standards, inclusionary policies, and density bonus program, to demonstrate the City has adequate sites to meet housing targets.

LWC also worked to understand and clarify the City's growth management programs, including the "Housing Implementation Program (HIP)" ensuring the policies are not overly restrictive to housing production. The competitive HIP allocates a limited number of housing permits over a 3-year period to focus growth in certain areas, promote a variety of housing types, and ensure adequate infrastructure and services. Projects with affordable housing are given priority, and certain projects are exempt.

LWC worked closely with the City and the State Department of Housing and Community Development (HCD) staff to ensure compliance with recently adopted state requirements and streamline review. The Housing Element complies with all State requirements, was adopted in March 2015, and certified by HCD in April 2015.

City of Livermore

2015 Housing Element

Prepared by LWC
City of Livermore

2.3 HOUSEHOLD CHARACTERISTICS

Understanding household characteristics such as type, size, and income level further helps to determine the type of housing needed and desired by residents. For example, households with children typically have more bedrooms in their housing needs and require larger units. In addition, income is a critical characteristic in determining residents' housing opportunities and affordability. Income affects a household's decision about where to live, type, and location of housing.

The section outlines how household characteristics impact housing needs.

HOUSEHOLD TYPE

According to the U.S. Census, the City of Livermore had 29,134 households in 2010, an 11.5 percent increase from 2000. As shown in Table 2-14, Livermore has a higher percentage of family households (71.1 percent), compared to Alameda County (64.6 percent). The majority of family households in both the City of Livermore and Alameda County were composed of married couples, of which Livermore also has a larger percentage. In both the City and County, single males are the majority of non-family households.

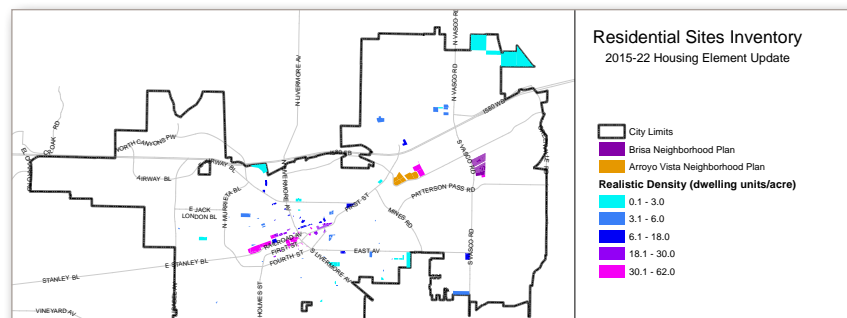
Characteristic	Livermore	Alameda County
Total Households	29,134	29,134
Family Households	20,712	18,840
Non-Family Households	8,422	10,294
Married Couples (as % of family households)	68.4%	64.6%
Single Males (as % of non-family households)	54.1%	54.1%

Source: U.S. Census, 2010

Family households consist of a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. Nonfamily households are composed of a person or persons living alone or of two or more people living alone.

HOUSEHOLD INCOME

Table 2-14 shows the median household income for Livermore and the neighboring cities of Dublin and Pleasanton, as well as Alameda County. According to data from the U.S. Census and the ACS, the City of Livermore's median household income was higher than Alameda County but lower than Pleasanton and Dublin. Based on information from the State of California's Department of Housing and Community Development, Alameda County ranked fourth among all counties in



LWC

CITY OF LONG BEACH

Housing Element Update, 6th Cycle

STATUS:

Anticipated Adoption
September 2021

TIMEFRAME:

February 2020 - December
2021

BUDGET:

\$927,000

REFERENCE:

Allison Spindler-Ruiz, AICP
Planner & Budget Specialist
Development Services
Planning Bureau
City of Long Beach
411 W. Ocean Blvd., 3rd Floor
Long Beach, CA 90802
(562) 570-6946
[allison.spindlerruiz@
longbeach.gov](mailto:allison.spindlerruiz@longbeach.gov)

PARTNERS:

The Roberts Group
Veronica Tam & Associates

LWC is currently leading the 6th Cycle update of the City of Long Beach Housing Element. With a population of over 460,000, Long Beach is the 7th largest city in California and represents diverse community conditions, a range of housing opportunities and impediments, and complex land use regulations. The RHNA retirement for Long Beach in the 6th Cycle is over 26,502 units.

Given the COVID-19 crisis and City health and safety protocols, the LWC-led team is working closely with City staff to collaborate and conduct virtual outreach. Online community-wide forums, digital focus group meetings, and a project website provide information about the project, background on housing law and local housing conditions, and solicit feedback on the City's Housing Element goals and potential policy solutions.

A key component of the project is The GIS driven site inventory and analysis process that examined over 86,000 parcels to identify eligible opportunity sites. This work was supported by a detailed assessment of current and past projects to understand realistic and feasible development capacity. Ongoing work includes evaluating governmental and non-governmental constraints to housing production, 5th Cycle program evaluation, current and future needs assessment, resource assessment, and the preparation of policies that will conform to the State of California's requirements for Housing Elements.

Critical issues focus on the need to strengthen fair housing and to identify suitable sites for below-market rate housing in a heavily "built-out" city. City Council adoption and HCD certification are expected in Fall 2021.



LWC**CITY OF MOUNTAIN VIEW****Update R3 Zoning, Financial Feasibility Analysis and Anti-Displacement Strategy****STATUS:**

Anticipated Adoption for
Spring 2021

TIMEFRAME:

March 2020 - Spring 2021

BUDGET:

\$1.145M

REFERENCE:

Martin Alkire
Advanced Planning
Manager
City of Mountain View
500 Castro Street
Mountain View, CA 94039
(650) 903-6306,
*Martin.Alkire@
mountainview.gov*

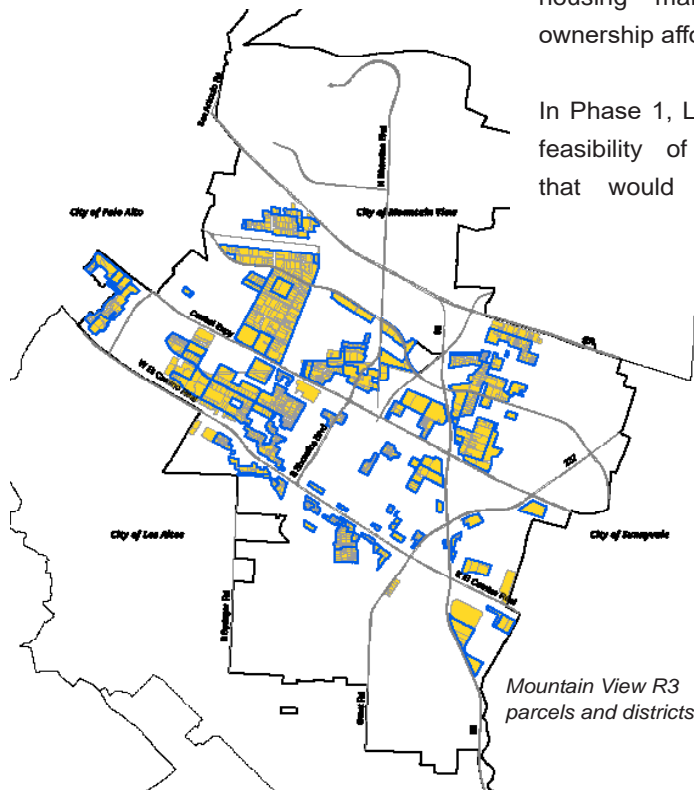
LWC is currently providing development finance and economic advisory services to support the City of Mountain View as part of a team led by Opticos Design, Inc. in the update its R3 (Multifamily Residential) zoning. LWC is also responsible for an anti-displacement response strategy. The objective of the zoning code update is to increase the quantity, diversity, and affordability of housing through the incorporation of form-based zoning standards and the incentivization of stacked-flat and higher-density development.

The city has experienced high employment growth but fallen short in housing development, further exacerbating the pressures of the housing market and rental and ownership affordability.

In Phase 1, LWC tested the financial feasibility of prototypical buildings that would conform to potential

form-based building types to inform the development of various design standards across the R3 subareas. The analysis used a static pro forma model to estimate the financial returns of a range of building prototypes and relied on industry standard metrics that indicate the likelihood of development: developer profit and returns on cost.

In Phase 2, as part of a larger city-wide anti-displacement response strategy, LWC will perform a replacement analysis to model the impacts of SB 330 and ultimately a potential long-term unit replacement requirement for developments that demolish existing rent-stabilized units. LWC will also support ODI in estimating the potential yield of units that could come online given the proposed zones and standards and develop an illustrative parking analysis to understand the cost- and feasibility-implications of adding parking on a per-project and per-unit basis.



*Thursday night
live in downtown
Mountain View*



*Shoreline
Ampetheatre and
Recreational Area*

LWC CITY OF RICHMOND

Housing Element Update, 4th and 5th Cycle

STATUS:

4th Cycle: Adopted and Certified in November 2012

5th Cycle: Adopted in May and Certified in June 2015

TIMEFRAME:

4th Cycle: March - November 2012

5th Cycle: March - June 2015

BUDGET:

4th Cycle: \$28,000

5th Cycle: \$35,000

REFERENCE:

Lina Velasco
Director of Planning and Building Services
City of Richmond
450 Civic Center Plaza
Richmond, CA 94804
(510) 620-6706
Lina_Velasco@ci.richmond.ca.us

PARTNERS:

Seifel Consulting (4th Cycle)

LWC was hired by the City of Richmond to update its 4th Cycle and 5th Cycle Housing Elements (HEU). The City of Richmond has a history of working hard to provide equitable housing opportunities and protect its most vulnerable residents.

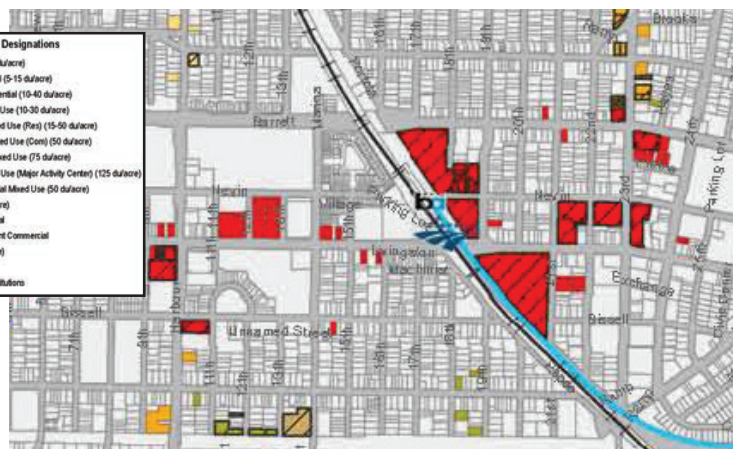
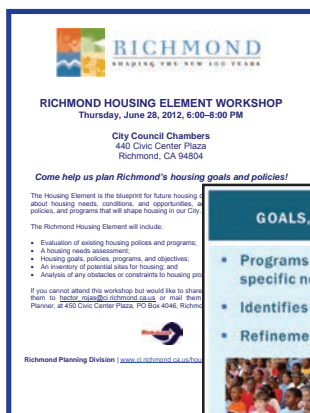
LWC worked closely with the City to review and update housing goals, policies, and programs in response to community input received through public workshops, small group interviews with community housing advocates, and public hearings. A major element of the 4th Cycle Housing Element update was an expanded outreach program focused on primary housing issues, such as foreclosures, development of a Community Land Trust, rent control, blight, and inclusionary housing requirements.

LWC worked quickly to address HCD comments on the draft 4th Cycle Housing Element, prioritizing an updated vacant land inventory, and prepared an element that met

State requirements. LWC also made recommendations to update City's Zoning Code to be in compliance with Senate Bill 2 (SB2) related to transitional and supportive housing and emergency shelters.

For the 5th Cycle, LWC built on work done for the 4th Cycle to develop an efficient two-month update timeline, focusing on components that were out of date, such as the vacant land inventory and needs assessment, as well as ensure additional outreach in compliance with State law. LWC supported the City through close coordination and communication with HCD on the review, edit and certification process.

The 4th Cycle HEU was adopted by the City and certified by HCD in November of 2012, and the 5th Cycle HEU was adopted and certified in June of 2015.



LWC

CITY OF WOODLAND

Housing Element Update, 6th Cycle

STATUS:

Anticipated Adoption
August 2021

TIMEFRAME:

October 2020 - September
2021

BUDGET:

\$107, 200

REFERENCE:

Cindy Norris
Principal Planner
Community Development
Department
300 First Street
Woodland, CA 95695
(530) 661-5911
Cindy.Norris@cityofwoodland.org

LWC was hired by the City of Woodland to update the 6th Cycle Housing Element, funded by the HCD's Local Early Action Planning (LEAP) grant program. LWC is concurrently leading a comprehensive Zoning Code update in Woodland and has an excellent understanding of the City's regulatory framework, development opportunities and constraints, and community vision. This project requires an expedited schedule as Woodland is located within the Sacramento Area Council of Governments (SACOG) region.

Woodland is 15 miles from the State capital and part of the Sacramento - Arden-Arcade - Roseville Metropolitan Statistical Area. The City's vision is to accommodate a broader range of development types that protect and reflect the City's historic character and neighborhood contexts while meeting affordability, diversity targets, and State 6th Cycle mandates.

LWC worked closely with the City to expedite the work plan, ensuring coordination between the Housing Element and Zoning Code Update in identifying sites to accommodate the RHNA and modifying development regulations, as needed, to reduce constraints and accommodate housing for a variety of income levels. The work plan also includes a series of focus group meetings and one virtual public workshop, designed to accommodate social distancing requirements while also facilitating a diverse and inclusive process.

LWC delivered the Administrative Draft on January 30 and the project is on track for public review, HCD review, and City adoption before September 2021.



Subconsultant Related Project Examples

Plan to Place

DOWNTOWN VISION PLAN

Los Altos, CA

www.plantoplace.com



The visioning effort for Downtown Los Altos included over 40 engagement activities to gather input on community aspirations and support for land use and circulation vision scenarios. Plan to Place lead the engagement process through intercept/"pop-up" workshops, walking tours, and focus group meetings. To elevate the perspective of traditionally under-represented community members, the team held targeted neighborhood meetings with Community and Minority Coalitions; Faith-Based organizations; PTAs; Little League, Soccer League commissions and Junior Olympics committees, High Schools and Senior groups. Hands-on interactive workshops were held throughout the downtown area, paired with a project website (losaltosca.gov) and online engagement tools and surveys (mailed to every household and business and administered through the City's Open City Hall platform) that received over 1,500 responses.

KEY ELEMENTS AND ACCOMPLISHMENTS

- Targeted meetings and strategies to elevate a range of community perspectives, particularly those are typically not included in the process.
- Digital and in-person outreach strategies to meet the community where they were and provide convenient access to the project.
- A Vision Plan that was unanimously approved by the City Council, and praised by both city leaders and community members as the most comprehensive and successful community engagement process the City has ever experienced.

CLIENT

City of Los Altos

SERVICES

Comprehensive Engagement Strategy
Targeted Focus Group Meetings
Visioning Exercises
Branding/Communication Tools

TIMELINE

2017 - 2018

REFERENCE

Jon Biggs

Community Development Director,
City of Los Altos
email: jbiggs@losaltosca.gov
phone: 650-281-6301

"It has been a pleasure to work with you on the Downtown Los Altos Vision project. Your guidance and expertise in public outreach have truly helped the effort be a successful one. all of the Los Altos participants that helped form the vision, we're able to do so because of your great work!"

- **Jon Biggs**, Community Development Director, City of Los Altos



Subconsultant Related Project Examples

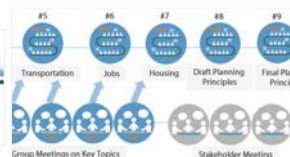
DIRIDON STATION AREA CIVIC ENGAGEMENT

San Jose, CA

Plan to Place, in partnership with Raimi + Associates, is collaborating with the City of San Jose a civic engagement strategy to input related to a transit hub in the heart of the Downtown San Jose, targeted by Google for a mixed-use campus. Outreach activities include regular meetings with a 38-person advisory group (representing perspectives ranging from the formerly homeless and housing advocates, to major business and development interests), focus/solution group meetings, pop-up/intercept and stakeholder meetings, walking tours, and regional workshops. Many meetings and workshops have been held solely in Spanish and all meeting materials have been translated in multiple languages, accessible by the diverse San Jose community. Surveys were also administered to provide convenient access to all, specifically targeted at segments of the community that are typically unable to attend meetings and workshops. Branding materials and digital tools including a custom project website (<https://www.diridonsj.org/>) have also been prepared to gather and share information through a transparent process.

KEY ELEMENTS AND ACCOMPLISHMENTS

- Co-produced engagement strategies through an iterative and flexible stakeholder and community-led process, that led to approximately 70 community meetings.
- Facilitation of multiple perspectives and management of expectations represented through a large community advisory group.
- Branding materials that reinforce project identity and establish consistent communication templates, and preparation of a project website that reached close to 40,000 unique visitors.
- Messaging, training and capacity building with community ambassadors.



www.plantoplace.com

CLIENT

City of San Jose

SERVICES

Community Engagement Strategy
Advisory Group Facilitation
Branding/Communication Tools
Bi-Lingual Outreach
Capacity Building

TIMELINE

2017 – present

REFERENCE

Lee Wilcox

Chief of Staff, Office of the City Manager, City of San Jose
email: lee.wilcox@sanjoseca.gov
phone: 408.535.4873

Subconsultant Related Project Examples

DOWNTOWN ENGAGEMENT + SPECIFIC PLAN

San Mateo, CA

The "Engage Downtown San Mateo" project kicked off in 2015 through a variety of digital and in-person outreach strategies to thoughtfully engage the community. Outreach included hands on and informed discussions with local stakeholders, regional experts and decision makers through "Taste and Task / Downtown Future Forums", surveys, walking tours, and pop-up workshops. The project culminated in an Assets and Opportunities Report which launched the Downtown Plan Update, that Plan to Place is currently collaborating with the City on. A project website (engagedowntownsanmateo.org) was prepared to host information on upcoming events, summaries and pictures/videos from events, and to link to the City's social media outlets.

KEY ELEMENTS AND ACCOMPLISHMENTS

- Multi-pronged outreach strategy designed to engage traditionally under-represented members of the community.
- Educational and engaging forums that brought regional experts together with the community to respectfully share insights on the latest land use, circulation and market trends impacting the area.
- Use of various high-tech and high-touch hands-on engagement exercises to spark creativity and idea-generation.
- A project website and branding materials that created a recognizable identity for the project and connected the community to key events and resources.
- Set the foundation for the Downtown Specific Plan and provided a clear direction of objectives for future updates to Downtown San Mateo.



www.plantoplace.com

CLIENT

City of San Mateo

SERVICES

Community Engagement Strategy
Forum Facilitation
Branding/Communication Tools
Stakeholder Outreach
Capacity Building

TIMELINE

2015 – present

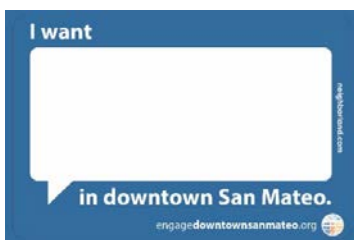
REFERENCE

Marcus Clarke

Former Economic Development
Manager, City of San Mateo
email: mclarke707@gmail.com

"Dave is by far the best project manager I have worked with. His management of our Downtown San Mateo Engagement project was exceptional, and is still being talked about as a model community engagement strategy for the community and beyond. I highly recommend Plan to Place for any of your planning or project management endeavors."

- **Marcus Clarke**, Former Economic Development Manager, City of San Mateo



Subconsultant Related Project Examples

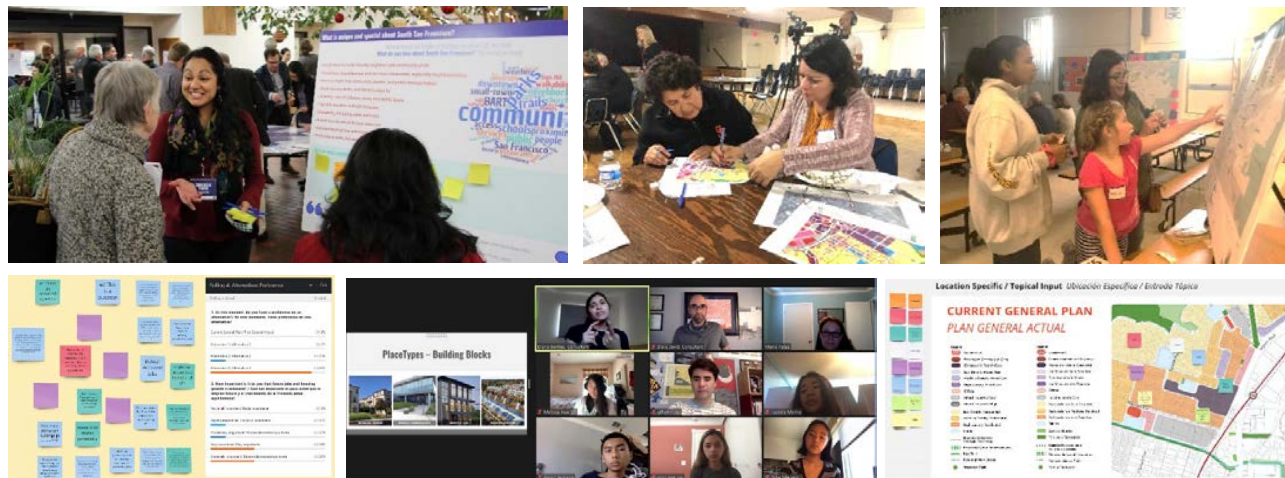
SOUTH SAN FRANCISCO GENERAL PLAN UPDATE

South San Francisco, CA

Plan to Place, in partnership with Raimi + Associates, is working closely with the South San Francisco community to implement a comprehensive engagement plan to reach all segments of the community. Thoughtfully planned and executed engagement activities included advisory group and stakeholder meetings with residents, youth groups/committees, faith-based organizations, the business and development community, and regional agencies. Initially interactive in-person meetings and workshops were held city-wide and in sub-areas throughout the city to define the unique character of neighborhoods. Plan to Place also helped prepare virtual platforms to provide access to the planning effort through online media, surveys and feedback forms to engage diverse perspectives. To bridge the digital divide, postcards and paper surveys were also mailed and distributed at locations throughout the city to ensure equal access for all who wanted to contribute. Most importantly, we teamed with community partners that helped extend the reach of the project.

KEY ELEMENTS AND ACCOMPLISHMENTS

- Highly collaborative effort with city staff and community leaders to co-produce and implement a range of engagement strategies.
- Preparation of high and low tech, inclusive outreach activities and platforms that engaged with a diverse cross section of the community.
- Thoughtful facilitation of conversation with residents and stakeholders to uncover key concerns and opportunities.
- Building trust and support from community members for the goals, objectives and policy measures that will guide the future of the city.



www.plantoplace.com

CLIENT

City of South San Francisco

SERVICES

Community Engagement Strategy
Stakeholder Meeting Facilitation
Virtual Online Platforms
Interactive Engagement Activities

TIMELINE

2019 – present

REFERENCE

Billy Gross

Senior Planner, City of San Francisco
email: Billy.Gross@ssf.net
phone: 650.877.8535

Subconsultant Related Project Examples

Rincon Consultants, Inc.



CITY OF NOVATO

Novato General Plan Technical Studies and EIR

REFERENCE:

Steve Marshall, Planning Manager
Community Development
Department
City of Novato
(415) 899-8942
smarshall@novato.org

TIMEFRAME:

October 2017 to October 2020



Rincon recently assisted Mintier Harnish in updating the General Plan and EIR for the City of Novato. Rincon's scope of work includes preparing a noise technical study (including noise contour maps that will be included in the Noise Element of the General Plan), a traffic study (to be prepared by subconsultant W-Trans), and a Program EIR. Rincon also led a public scoping meeting, prepared all CEQA noticing and provided staff support at public hearings. The focus of the impact analysis in the Program EIR will be related to the policy changes in the Draft General Plan, assessing the proposed land use changes in four focus areas in the City including an expansion of biotechnology industrial uses, increasing opportunities for higher density residential (thus increasing the City's stock of affordable housing) and reviewing alternatives to the proposed General Plan. Rincon will also conduct a detailed greenhouse gas analysis associated with the potential increase of greenhouse gas emissions as a result of the General Plan and determine the project's consistency with both Assembly Bill (AB) 32 and the year 2030 statewide targets established by Senate Bill (SB) 32. The Draft EIR will be released for public review in the fall of 2019 and hearings for certification of the EIR and adoption of the General Plan are anticipated for the winter of 2020.

Subconsultant Related Project Examples

CITY OF SEASIDE

Safety, Noise, and Conservation/Open Space Elements – Seaside General Plan Update and EIR



REFERENCE:

Sharon Mikesell, Administrative Analyst
Economic Development
City of Seaside
(831) 899-6734
smikesell@ci.seaside.ca.us

TIMEFRAME:

February 2016 to Present

Rincon is currently part of a team authorizing an update to the City of Seaside General Plan. Specifically, Rincon prepared the Safety, Noise, and Conservation/Open Space Elements of the General Plan and assisted with preparation of the Parks and Recreation Element. The updated General Plan will guide the future of Seaside and its residents with respects to new land uses, economic opportunities, and safety concerns due to climate change and sea level rise. The General Plan will work to protect the coastal community by preserving the natural habitat that extends beyond the City's boundaries in balance with Seaside's desire to be developed as a well-rounded mixed-use community.

CITY OF ROHNERT PARK

Rohnert Park General Plan, GHG Reduction Plan, and EIR



REFERENCE:

Jeffrey Beiswenger, Planning Manager
Development Services
City of Rohnert Park
(707) 588-2253
jbeiswnger@rpcity.org

TIMEFRAME:

May 2018 to Present

As a subconsultant to Mintier Harnish, Rincon is assisting with policy development for a number of the General Plan Elements (including the Environmental Conservation, Noise and Safety elements), preparing a greenhouse gas reduction plan, and preparing the General Plan EIR. Rincon is also assisting with development of a climate change vulnerability assessment. The team will prepare all technical analysis, impact and mitigation measures of the EIR excluding transportation. For the GHG analysis, Rincon will conduct a comprehensive inventory of community baseline GHG emissions and prepare forecasts consistent with State reduction targets. The programmatic EIR will evaluate the potential physical impacts of the General Plan goals, policies, and programs. This program EIR will serve as a first-tier environmental document under CEQA, that assists in streamlining future CEQA review by supporting second-tier environmental documents for projects with detailed designs that have been developed for implementation within the City. Further, the EIR will also include all necessary components to assure that the General Plan is a qualified greenhouse gas reduction plan that enables CEQA streamlining of subsequent development projects consistent with the Plan.



List of References

Lisa Wise Consulting, Inc.

LWC

City of Livermore

Services: Housing Element Update, 5th Cycle

Timeframe: May 2014 - April 2015

Christine Rodrigues

Assistant to the City Manager

(925) 960-4410

cnrodrigues@ci.livermore.ca.us

City of Long Beach

Services: Housing Element Update, 6th Cycle

Timeframe: February 2020 - December 2021

Alison Spindler-Ruiz, AICP

Planner & Budget Specialist

(562) 570-6946

alison.spindlerruiz@longbeach.gov

City of Mountain View

Services: Update R3 Zoning, Financial Feasibility Analysis and Anti-Displacement Strategy

Timeframe: March 2020 - February 2021

Martin Alkire

Advanced Planning Manager

(650) 903-6306

martin.alkire@mountainview.gov

City of Richmond

Services: Housing Element Update, 4th and 5th Cycle

Timeframe:

4th Cycle: March 2012 - November 2012

5th Cycle: March 2015 - June 2015

Lina Velasco

Director of Planning and Building Services

(510) 620-6706

lina_velasco@ci.richmond.ca.us

City of Woodland

Services: Housing Element Update, 6th Cycle

Timeframe: October 2020 - August 2021

Cindy Norris

Principal Planner

(530) 661-5911

cindy.norris@cityofwoodland.org

List of References



Plan to Place

City of Los Altos

Services: Downtown Vision Plan

Timeframe: 2017 - 2018

Jon Biggs

Community Development Director

(650) 281-6301

jbiggs@losaltosca.gov

City of San Mateo

Services: Downtown Engagement + Specific Plan

Timeframe: 2015 - Present

Marcus Clarke

Former Economic Development

mclarke707@gmail.com

City of San Jose

Services: Diridon Station Area Civic Engagement

Timeframe: 2017 - Present

Lee Wilcox

Chief of Staff

(408) 535-4873

lee.wilcox@sanjoseca.gov

City of South San Francisco

Services: General Plan Update

Timeframe: 2019 - Present

Billy Gross

Senior Planner

(650) 877-8535

billy.gross@ssf.net



Rincon Consultants, Inc.

City of Novato

Services: Novato General Plan Technical Studies and EIR

Timeframe: October 2017 - October 2020

Steve Marshall

Planning Manager

(415) 899-8942

smarshall@novato.org

City of Seaside

Services: Safety, Noise, and Conservation/Open Space Elements - Seaside General Plan Update and EIR

Timeframe: February 2016 - Present

Sharon Mikesell

Administrative Analyst

(831) 899-6734

smikesell@ci.seaside.ca.us

City of Rohnert Park

Services: Rohnert Park General Plan, GHG Reduction Plan, and EIR

Timeframe: May 2018 - Present

Jeffrey Beiswenger

Planning Manager

(707) 588-2253

jbeiswenger@rpcity.org

5

Public Engagement Experience

Lisa Wise Consulting, Inc.

Public engagement is at the heart of all LWC's work.

Our approach to public engagement assures that a broad representation of the community has multiple and substantive opportunities to participate in the project and that the community's voice is reflected in the findings and final recommendations. This includes input from hard-to-reach and special needs residents. Equally, we are committed to assuring that community engagement emphasizes education, uses clear and consistent messaging and focuses on important topics such as alternative policies and programs, site options, draft housing element strategies, and draft General Plan and zoning amendments.

LWC has successfully led hundreds of hours of workshops, charrettes, public meetings, personal interviews, surveys and study sessions to ensure that the communities in which we work understand the scope, timeline, and goals of the project, are aware of the opportunities to participate, and are true partners in the formulation of the vision and strategies.

Examples of Recent LWC-led Community Engagement Projects:

Online Surveys:

- **Marin County (10 jurisdictions), CA**, Multifamily and Mixed-Use Objective Design Standards projects
- **Piedmont, CA**, Multi Family Objective Design Standards
- **Lompoc, CA**, Comprehensive Code Update
- **Mammoth Lakes**, Affordable Housing Conceptual Land Use Plan

Personal Interviews/Focus Groups:

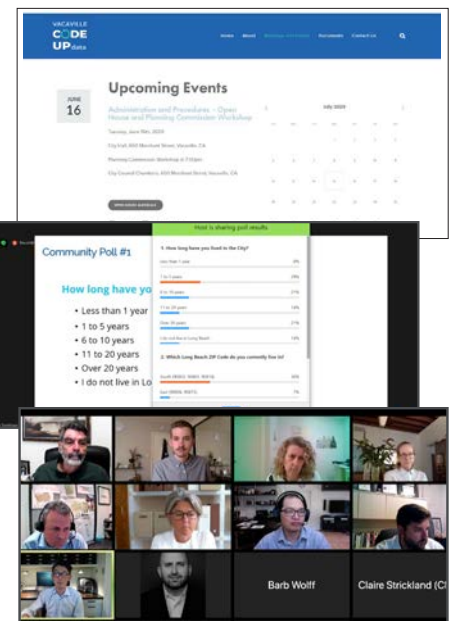
- **Long Beach, CA**, 6th Cycle Housing Element Update
- **Woodland, CA**, 6th Cycle Housing Element Update
- **Los Altos, CA**, Objective Design Standards
- **Columbus, OH**, Code Audit and Update Strategy
- **St. Helena, CA**, Comprehensive Code Update
- **Piedmont, CA**, Objective Design Standards

Steering Committee/Task Force:

- **Coachella, CA**, 6th Cycle Housing Element Update
- **Castro Valley, CA**, General Plan Implementation
- **Hayward, CA**, Downtown Specific Plan and Code (Task Force)
- **St. Helena, CA**, Comprehensive Code Update

Due to the critical importance of Public Engagement on this project, our team includes Plan to Place, a firm dedicated to public engagement and familiar with Piedmont's strategic planning efforts.

LWC and Rincon also bring solid public engagement skills and experience. Our commitment and collective skills and experience assure that the Housing Element Update process will be transparent and actively engage a broad representation on substantive issues of the community from start to finish.



LWC has successfully adapted to connect with stakeholders, clients, and focus groups to comply with shelter-in-place restrictions during the COVID-19 public health emergency.

Public Engagement Experience

Workshops/Open Houses:

- **Long Beach, CA**, 6th Cycle Housing Element Update
- **Redwood City, CA**, Residential Design Guidelines
- **Hayward, CA**, Downtown Specific Plan and Code
- **Mammoth Lakes, CA**, Affordable Housing Conceptual Land Use Plan

Study Sessions with Planning Commission and/or City Council:

- **Sausalito, CA**, 6th Cycle Housing Element Update Basics and Overview
- **Coachella, CA**, 6th Cycle Housing Element Update Basics and Overview
- **Vacaville, CA**, Code Audit and Comprehensive Code Update
- **Lompoc, CA**, Comprehensive Code Update



Plan to Place

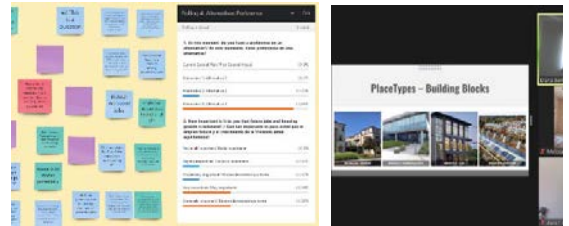
Engagement + Facilitation + Collaboration

Plan to Place is a community engagement and communication firm based in Marin County. At Plan to Place we value highly collaborative and inclusive community-based, neighborhood and urban planning efforts. As a full-service engagement firm, we are continually exploring and innovating new outreach tools that are tailored to meet the needs of our clients.

Examples of Recent Plan to Place-led Community Engagement Projects:

Interactive Workshops, Walking Tours, Focus Groups, Project Website, Surveys

- **Mountain View, CA**, 6th Cycle Housing Element Update
- **Los Altos, CA**, Downtown Vision Plan
- **San Jose, CA**, Diridon Station Area Civic Engagement
- **San Mateo, CA**, Downtown Engagement + Specific Plan
- **South San Francisco, CA**, Community Engagement, General Plan Update
- **Marin County, CA**, Objective Design and Development Standards
- **San Carlos, CA**, Eastside Innovation District
- **Petaluma, CA**, General Plan Update
- **Berkeley, CA**, BART Station Planning



Public Engagement Experience

Rincon Consultants, Inc.

Rincon has extensive experience completing community outreach programs, conducting public hearings, and supporting numerous municipalities during the public participation phase of projects. Rincon brings technical experts and bilingual public participation experts together to conduct these meetings. Our experienced facilitators have managed public outreach campaigns for land development and transportation projects, Climate Action Plans, General Plans, and other planning efforts throughout California since 1994. Through our planning expertise and in-house graphics and design capabilities, we help clients connect with their communities and enhance project outcomes.

As professional planners, we understand the importance of engaging both responsible agencies and the public throughout the planning process. We also know how to work closely with stakeholders and public officials to communicate information clearly and work toward common goals. Our planning staff has extensive experience managing a broad range of public involvement programs, from online campaigns and innovative tailored activities to traditional meetings and workshops.

Select Clients

Expertise

- | | |
|---------------------------------|------------------------|
| • City of Berkeley | • Meeting Facilitation |
| • City of Palo Alto | • Public Workshops |
| • City of West Hollywood | • Pop-up Workshops |
| • City of Corona | • Stakeholder Meetings |
| • City of Camarillo | • Support Documents |
| • City of Santa Clarita | • Data Visualization |
| • City of Calipatria | • Online Engagement |

Selected Housing Element Outreach Projects

- **City of Palo Alto, CA**, Housing Element
- **City of Carlsbad, CA**, Housing Element
- **City of Vista, CA**, Housing Element
- **City of Oxnard, CA**, Housing Element
- **City of Port Hueneme, CA**, General Plan, Local Coastal Program, and Climate Action Plan Update
- **City of Avalon, CA**, General Plan, Local Coastal Plan

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6 Fee Proposal

Based on the tasks identified in the Scope of Services, we are pleased to submit a cost proposal for the City of Piedmont Housing Element Update for a total cost of **\$612,230**. This is a not to exceed fee that covers the tasks included in the scope of services. Optional tasks are priced separately. We have budgeted for all of the tasks with a level of effort that we believe is necessary to meet the project objectives and achieve success. Below is a table summarizing the proposed budget by major task and firm. The number and types of meetings specified in Task 2, Community Outreach and Engagement, can be reallocated within the fixed fee budget, by mutual agreement between the City and the consultant team. For a detailed budget see Appendix B on page 63.

	LWC		Plan to Place		Rincon			
City of Piedmont 6th Cycle Housing Element Update	LWC Total		Plan to Place Total		Rincon Total		PROJECT TOTAL	
	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost
Task 1 Project Initiation								
Subtotal Task 1	356	\$ 72,500	100	\$ 18,540	44	\$ 7,132	500	\$ 98,172
Task 2 Community Outreach and Engagement								
Subtotal Task 2	354	\$ 68,110	573	\$ 102,300	12	\$ 2,352	939	\$ 172,762
Task 3 Technical Studies and Issues Evaluation								
Subtotal Task 3	328	\$ 57,720	-	\$ -	-	\$ -	328	\$ 57,720
Task 4 Sites Inventory								
Subtotal Task 4	378	\$ 88,530	-	\$ -	-	\$ -	378	\$ 88,530
Task 5 Affirmatively Furthering Fair Housing								
Subtotal Task 5	68	\$ 12,340	-	\$ -	-	\$ -	68	\$ 12,340
Task 6 General Plan Amendments								
SubTotal Task 6	230	\$ 40,770	-	\$ -	177	\$ 25,416	407	\$ 66,186
Task 7 Draft Housing Element and Public Meetings								
SubTotal Task 7	\$ 473	\$ 85,965	-	\$ -	-	\$ -	473	\$ 85,965
Task 8 Final Draft Meetings, Final Adoption and Certification								
Subtotal Task 8	52	\$ 16,060	-	\$ -	-	\$ -	52	\$ 16,060
Task 9 Additional Tasks								
Subtotal Task 9	52	\$ 9,300	-	\$ -	-	\$ -	52	\$ 9,300
TOTAL FEE	2,327	\$ 451,295	673	\$ 120,840	233	\$ 34,900	3,197	\$ 607,035
Direct Costs		\$ 3,000		\$ 2,000		\$ 195		\$ 5,195
GRAND TOTAL								\$ 612,230
OPTIONAL TASKS								
Stakeholder/Focus Group Meeting (6)		\$19,500						
Survey (1)		\$15,000						
Planning Commission and City Council Study		\$15,000						
Tailoring of ABAG Regional Housing Technical		\$5,000						
Fiscal Impact Analysis		\$17,000						
Informational Videos		\$1,500 per one to five minute video requested						

Hourly Rate

The table below lists hourly rates per staff level.



Lisa Wise Consulting, Inc

Principal	\$285
Director	\$225
Senior Associate	\$185
Associate	\$150



Rincon Consultants

Principal I	\$227
Senior Supervisor II	\$211
Senior Professional I	\$165
Professional IV	\$149
Professional II	\$118
GIS/CADD Specialist II	\$129
Technical Editor	\$115
Production Specialist	\$91
Clerical	\$77



PLAN to PLACE

Principal	\$215
Engagement Specialist + Urban Designer	\$165
Graphic Designer	\$135

Appendix A: Resumes

LISA WISE, AICP

President, Owner

LWC

As a certified planner and public accountant, Lisa has over 30 years of professional experience in land use planning, housing policy, real estate finance, and the management of complex projects. Lisa is considered a national expert on housing policy and code reform, and presents on the topics regularly at State and National APA, League of California Cities, ULI and the New Partners for Smart Growth conferences. Lisa is a part-time lecturer at the California Polytechnic State University in San Luis Obispo focusing on courses in housing and real estate finance.

Lisa has been directly responsible for a breadth of large-scale projects that assess land use policy and economic performance and make recommendations for more vibrant and resilient communities. These include 20 housing elements, 23 master and specific plans, 34 code updates, 35 economic projects, and several inclusionary and employee housing studies.

Prior to starting LWC in 2006, Lisa worked for land use planning firm Crawford, Multari & Clark Associates. From 1990 to 1999, Lisa was a Manager at PricewaterhouseCoopers (PwC), one of the "Big Four" international accounting, financial services and management consulting firms. At PwC, Lisa's responsibilities included managing large financial services engagements, building client relationships, mentoring staff, and teaching in-house classes.

Relevant Project Experience:

- Arroyo Grande, CA, Housing Element Update, 4th and 5th Cycle
- Atascadero, CA, Affordable Housing Short sale Policy, Housing Element Implementation and Housing Element 4th and 5th Cycle
- Benicia, CA, Housing Element Update, 4th and 5th Cycle
- Flagstaff, AZ, Zoning Ordinance Update
- Grover Beach, CA, Zoning Code Update, West Grand Avenue Masterplan, and 4th Cycle Housing Element Update
- King City, CA, Housing Element, 4th Cycle
- Livermore, CA, Development Code Update and 5th Cycle Housing Element Update
- Loomis, CA, Housing Element Update 3rd, 4th and 5th Cycle
- Malibu, CA, Zoning Code and Local Implementation Plan Update
- Merced, CA, Bellevue Corridor Plan
- Mesa, AZ, Form-Based Code and Regulating Plan
- Petaluma, CA SMART Rail Station Areas: TOD Master Plan
- Pismo Beach, CA, Housing Element, 4th Cycle
- Richmond, CA, Livable Corridors Plan, South Shore Specific Plan, and 4th and 5th Cycle Housing Element Update, Fair Housing Ordinance Evaluation and Update
- Tehachapi, CA, Housing Element Update 4th and 5th Cycle
- Vallejo, CA, Housing Element Update 5th Cycle
- Woodland, CA, 6th Cycle Housing Element Update



PAST WORK EXPERIENCE

California Polytechnic State University
San Luis Obispo, CA, Adjunct Faculty, 2002 - Present

Crawford, Multari & Clark Associates
San Luis Obispo, CA, Professional Consultant,
2001 - 2006

San Luis Obispo County
San Luis Obispo, CA, Staff Planner, 2000 - 2001

Governor's Office of Planning & Research
Sacramento, CA, Intern, 1999 - 2000

PricewaterhouseCoopers, LLP
New York, NY, Financial Services Manager, 1990 - 1999

EDUCATION

California Polytechnic State University
San Luis Obispo, CA, Master of City & Regional
Planning, 2001

DePaul University
Chicago, IL, M.S. Accountancy, 1990

University of Cincinnati
Cincinnati, OH, B.S. Business Administration in
Marketing & Finance, 1987

CERTIFICATIONS & MEMBERSHIPS

American Planning Association (APA)
2001 - Present

Certified Public Accountant, 1991

Congress for New Urbanism
2003 - Present
Paul Crawford Award for Excellence in Planning, 2017

Form-Based Code Institute
Chair, 2015 - 2018; Treasurer, 2014 - 2015

Dean's Leadership Council
California Polytechnic, School of Architecture
2018-Present

LWC

DAVID BERGMAN, AICP

Director

With over 25 years of experience, David has focused on community development, real estate and urban planning projects, with an emphasis on the formation and implementation of urban and regional development strategies, and public private-partnerships. David's strengths and expertise include public policy and alternatives analysis that balance economic feasibility, fiscal performance and community vision. He also brings an understanding of California Housing Law, earned working directly with California cities and counties on the identification and assessment of financing options for affordable housing, student and workforce housing and inclusionary housing, and strategies for improved jobs/housing balance and anti-displacement programs. As the Director of Planning for the City of South Pasadena, he oversaw the successful approval of the City's first density bonus application and adoption of an Accessory Dwelling Unit (ADU) Ordinance, that was approved by the California Department of Housing and Community Development (HCD).

David's commitment to client service centers around providing strategy alternatives based on market-driven research and consideration of local, regional and state law and precedent. His experience features large-scale mixed-use and urban infill developments, and planned communities. He has provided feasibility analysis and funding strategies across all major property sectors including residential, retail, office, industrial, hospitality, and institutional.

Recent examples of David's work include:

- Artesia, CA, Mixed-Use Overlay Zone Analysis and Recommendations
- Beverly Hills, CA, Fiscal Impacts
- Coachella Music and Arts Festival, Marketing and Promotion Programs, and Economic Impacts
- Long Beach, CA, 6th Cycle Housing Element Update and Housing Feasibility Study
- Long Beach, CA, Low- and Moderate-Income Housing Site Analysis
- Los Angeles, CA, Economic and Fiscal Impact Study, Los Angeles International Airport (LAX)
- Pasadena, CA, General Plan Economics and Land Use Element
- San Diego, CA, Barrio Logan Affordable Housing Strategy
- San Fernando, CA, Workforce Housing Economic Analysis and Strategy Alternatives
- Santa Clarita, CA, General Plan Economics and Land Use Element
- Santa Maria, CA, 6th Cycle Housing Element Update, Market Analysis and Annexation Strategy
- Santa Rosa, CA, Jobs Housing Balance Study
- State of California General Services Division, Community College and Residential Master Plan
- Sun Cal, Anaheim, CA, Inclusionary Housing Strategy, Palatium Triangle



PAST WORK EXPERIENCE

- Metropolitan Research and Economics
Santa Monica, CA, Principal, Director and Owner
2009 - 2020
- City of South Pasadena, CA
Director, Planning and Building
2018 - 2019
- City of Santa Cruz, CA
Manager of Special Projects, Economic Development
2014 - 2017
- Economics Research Associates
Los Angeles, CA, Principal
1996 - 2009

EDUCATION

- University of California
Los Angeles, CA, Master of Arts, Geography
Urban Planning
- University of Wisconsin
Madison, WI, B.A., Geography and Classical
History

ACADEMIC EXPERIENCE

- University of Southern California
School of Architecture, 2016 - 2019
- Southern California Institute of Architecture
2001 - 2016
- University of Michigan
School of Architecture, 2009 - 2010

KATHRYN SLAMA

Senior Associate

LWC

Kathryn has over seven years of hands-on housing, zoning code, station area planning, and project management experience, and is the Senior in charge of LWC's Los Angeles office. Kathryn leads the team on detailed policy and regulatory analysis, formulation of implementation strategies, housing policy, and streamlined and compliant zoning codes. Kathryn has worked with communities throughout California and across the country to reach consensus on priorities and develop strategies to clarify, streamline, and modernize development codes, with a focus on economic revitalization, resilience, and enabling well-designed places to live, shop, and do business.

Kathryn was the project manager on over 12 LWC Housing Element Updates, with eventual approval by the California Department of Housing and Community Development (HCD) and adoption by the cities. She has led several large-scale, complex projects from start to finish, on time and within budget in Fargo, ND, Alameda County, and Hayward CA.

Kathryn holds a Masters of City and Regional Planning degree from California Polytechnic State University, San Luis Obispo, where she graduated at the top of her class and a Bachelor of Arts degree in Environmental Studies from University of California, Santa Barbara.

Relevant Project Experience at LWC:

- Alameda County, CA, Ashland Cherryland Business District Specific Plan Update and Code
- Arroyo Grande, CA, Housing Element Update, 4th and 5th Cycle
- Atascadero, CA, Housing Element Implementation, Housing Element Update, 4th and 5th Cycle
- Austin, TX, Land Development Code Update
- Benicia, CA, Housing Element Update, 4th and 5th Cycle
- Coachella, CA, Housing Element Update, 6th Cycle
- Hayward, CA, Downtown Specific Plan and Form-Based Code
- Hayward, CA, Form-Based Codes Update
- Hermosa Beach, CA, General Plan Update
- Livermore, CA, Development Code Update
- Livermore, CA, Housing Element Update, 5th Cycle
- Lompoc, CA, Zoning Code Update
- Long Beach, Housing Element Update, 6th Cycle
- Long Beach, CA, Project Management Services
- Loomis, CA, Housing Element Update, 5th Cycle
- Pacific Grove, CA, Development Code Update
- Richmond, CA, Housing Element Update, 4th Cycle
- San Luis Obispo, CA, San Luis Ranch Specific Plan and Code
- Tehachapi, CA, Housing Element Update, 4th and 5th Cycle
- Tehachapi, CA, Zoning Ordinance Update and General Plan Consistency
- Woodland, CA, Housing Element Update, 6th Cycle



PAST WORK EXPERIENCE

California Polytechnic State University
San Luis Obispo, CA, Teaching Assistant
January 2013 - June 2013

City of Clearlake, CA
Graduate Student Planner
September 2012 - June 2013

City of Carpinteria, CA
Graduate Student Planner
March 2012 - June 2012

EDUCATION

California Polytechnic State University
San Luis Obispo, CA, Master of City & Regional Planning

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

CERTIFICATIONS & MEMBERSHIPS

American Planning Association (APA)
2011 - Present

Cal Poly Graduate Student Planning Association
2011 - 2013

LWC

KAREN HUYNH

Associate

Karen brings 10 years of experience to LWC in fiscal analysis, real estate finance, land use economics and manipulating large complex databases. Her strengths include housing feasibility studies, market analysis, long-range planning, and housing policy analysis. She brings expertise across multiple practice areas, such as affordable housing, economic development, fiscal impact analysis and development feasibility. She is adept in effective online and in-person community engagement techniques such as personal interviews, focus groups, workshops, and surveys. Combined with quantitative analyses, Karen brings a more holistic understanding of market conditions and regulatory frameworks to help cities address existing and anticipated challenges. She works closely with each client to deliver tailored research and recommendations aimed at creating more liveable, accessible, equitable and resilient places. In addition to policy and planning, Karen also brings a deep understanding of local government program management, funding and implementation.

Karen holds a Master of Public Policy degree from University of California, Berkeley, where she specialized in homelessness/housing policy and economic inequality. During graduate school, Karen conducted research on homeless policy in San Francisco and assessed performance of economic development incentives in U.S. cities before and after the 2008 depression.

Relevant Project Experience:

- Beaumont, CA, 6th Cycle Housing Element Update
- Culver City, CA, General Plan Update
- Gary, IN, Knight Foundation Financial Sustainability Strategy for Local Nonprofit
- La Cañada Flintridge, CA, Descanso Gardens Business Strategy
- Long Beach, CA, 6th Cycle Housing Element Update
- Los Angeles, CA, Taylor Yards G2 Park Financial Sustainability Strategy
- Mountain View, CA, R3 "Missing Middle" Zoning Update
- San Gabriel, CA, Housing Element Update, 6th CYcle
- Santa Maria, CA, General Plan Update, Market Analysis, Housing Element Update and Annexation Study
- Santa Monica, CA, Affordable Housing Production Program Update
- Temple City, CA, 6th Cycle Housing Element Update
- Woodland, CA, 6th Cycle Housing Element Update



PAST WORK EXPERIENCE

HR&A Advisors, Inc.

Housing and Economic Development Analyst
2018 - 2020

Los Angeles County, Dept. of Health Services

Program Manager, Housing for Health
2017 - 2018

Tipping Point

Graduate Student Consultant, Homeless Policy
2017

Institute for Research on Labor & Employment,

U.C. Berkeley, Graduate Student Researcher
2016

EDUCATION

University of California, Berkeley

Berkeley, CA, Master of Public Policy

Columbia University

New York, NY, B.A., Neuroscience

COMMUNITY INVOLVEMENT

Emerging LA, Participant

Salon series hosted by Molly Rysman, Housing and Homelessness Deputy, to address homelessness in LA County

New Leaders Council - LA, Fellow

Program aimed at developing leadership in politics, government, and law

DAVE JAVID, AICP, LEED AP

Founder + Principal

Dave has over 18 years of experience leading a diverse range of award-winning community-based planning efforts. Dave's experience as a project manager on vision, corridor, strategic specific plan and placemaking projects has provided invaluable insight on the opportunities and the challenges of balancing client objectives while meeting community expectations. By implementing a range of engagement and communication platforms, Dave has forged relationships with key community leaders to establish partnerships and a common dialogue that has led to successful policy outcomes.

FEATURED PROJECTS

SOUTH SAN FRANCISCO GENERAL PLAN + EIR | SOUTH FRANCISCO, CA

Leading the community engagement effort, in partnership with Raimi + Associates, to implement a comprehensive engagement plan. Co-facilitating meetings with the advisory group, stakeholders, residents, youth groups/committees, faith-based organizations, the business and development community, and regional agencies. Prepared interactive activities for in-person meetings and workshops and sub-areas meetings. Created virtual platforms to provide access to the planning effort through online media, surveys and feedback forms to engage diverse perspectives.

DIRIDON STATION AREA COMMUNITY ENGAGEMENT | SAN JOSE, CA

Leading a comprehensive engagement strategy through collaboration with Raimi + Associates and City staff to facilitate a range of community and passionate stakeholder input related to the transformation of a transit hub in the heart of the downtown, targeted by Google for a mixed-use campus. Outreach includes monthly meetings with a 38-person advisory group, stakeholder meetings, pop-up events, surveys, digital tools and a custom project website. Creative solutions have been implemented to ensure all community members have an equal opportunity to share their perspectives, while navigating large protests that often occur during community meetings.

MULTI-FAMILY OBJECTIVE DESIGN STANDARDS | MARIN COUNTY, CA

Leading the community engagement strategy, on a project led by Opticos Design, working closely with Planning Directors from 11 jurisdictions across Marin County to collectively prepared Objective Design Guidelines and Standards that will be used as a toolkit County wide. Outreach includes in-person workshops and a range of virtual platforms and interactive online tools.

ADDITIONAL RELEVANT PROJECTS

ASHBY + N. BERKELEY BART STATION ZONING | Berkeley, CA

COMPREHENSIVE PLAN | Memphis, TN

DOWNTOWN SPECIFIC PLAN AND EIR | San Mateo, CA

NORTH VENTURA COORDINATED AREA PLAN | Palo Alto, CA

DOWNTOWN VISION PLAN | Los Altos, CA

ADELINE CORRIDOR PLAN - RACIAL EQUITY LENS TOOL | Berkeley, CA

2015-2023 HOUSING ELEMENT UPDATE | Project Manager (while at previous firm) of Housing Elements in Burlingame, Mill Valley, San Rafael, and Sausalito



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EXPERIENCE

PLAN TO PLACE

Founder + Principal, 2016 – present

M-GROUP

Principal Planner + Designer, 2013 – 2016

PMC

Senior Urban Planner, 2011 – 2013

MIG INC.

Project Manager, 2009 – 2011

RRM DESIGN GROUP

Senior Planner, 2004 – 2009

EDUCATION

MASTER OF ARTS

City and Regional Planning
California Polytechnic State University
San Luis Obispo, CA

BACHELOR OF ARTS

Urban Studies and Planning,
Visual Arts Minor
University of California, San Diego
San Diego, CA

PRESENTATIONS

"Retooling the Outreach Toolkit"
CCAPA Conference, Oakland, CA

"Achieving Sustainable Results: Public and Private Efforts & Coordination"
CCAPA Conference, Hollywood, CA

"The Planner's Guide to Implementing Green Principles"
CCAPA Conference, San José, CA

MEMBERSHIPS +

ACCREDITATIONS

Co-Director, Sustainability Committee,
APA, Cal Northern - 2012-2015

American Institute of Certified Planners
(AICP)

Leadership in Energy and Environmental
Design Accredited Professional (LEED AP)
San Francisco Bay Area Planning and
Urban Research (SPUR)

PAUL KRONSER

Sr. Community Engagement and Design Specialist

Paul has over 10 years of experience in planning, urban design and community engagement. He has lead community outreach efforts to engage the public on various projects ranging from high density urban developments to rural active transportation grants. His experience has allowed him to gather skills in various community engagement methods, creating productive conversations around key issues facing communities today.

FEATURED PROJECTS

TRUCKEE TRANSIT STUDY | TRUCKEE, CA

Assisted with outreach and engagement for the Transit Center Feasibility study which included community meetings, informational community forums, interactive workshops, pop-up meetings, online surveys, and website creation which provided access to diverse sub populations of Truckee, CA.

TCTC ACTIVE TRANSPORTATION PLAN/PROGRAM | TUOLUMNE, CA

Led community outreach and engagement for a series of Caltrans Active Transportation Grant applications where community members were engaged to provide feedback on various project elements and goals. These meetings were held digitally in a series of webinars and live interactive presentations from County and City staff. Other outreach tools included interactive project specific website, online surveys, and pop-up events.

ACTIVE OROVILLE | OROVILLE, CA

Led the preparation and implementation of an engagement strategy with the City of Oroville to prepare a state funding application for pedestrian and bicycle improvements along a heavily traveled commercial corridor. The community engagement efforts included digital community workshops, stakeholder interviews, online surveys, mailers, and project overview video footage.

EL MONTE SPECIFIC PLAN | EL MONTE, CA

Led the community outreach efforts through a series of in person interactive workshops that included reviewing project design alternatives, design guidelines and policies along with managing smaller breakout sessions for specific Citywide issues and solutions. Comments and input received were used to create a Specific Plan that encompassed the community's vision for future growth and development.

ADDITIONAL RELEVANT PROJECTS

VALLEY'S EDGE SPECIFIC PLAN | Chico, CA

SAN LUIS RANCH SPECIFIC PLAN | San Luis Obispo, CA

PISMO BEACH VISION PLAN | Pismo Beach, CA

TRAVER PARK COMMUNITY VISIONING PROJECT | Traver, CA

EAGLE RANCH SPECIFIC PLAN | Atascadero, CA

FORT BRAGG MILL SITE SPECIFIC PLAN | Fort Bragg, CA



EXPERIENCE

PLAN TO PLACE

Sr. Community Engagement and Design Specialist,
2020 – present

GREENDOT TRANSPORTATION SOLUTIONS

Transportation Planner, 2019 – 2020

FRAYJI DESIGN GROUP

Senior Planner, 2017 – 2019

RRM DESIGN GROUP

Planner, 2013-2016

REC SOLAR

Account Manager, 2009-2013

RRM DESIGN GROUP

Assistant Planner, 2007-2009

EDUCATION

BACHELOR OF SCIENCE COMMUNITY AND REGIONAL PLANNING

Iowa State University, Ames IA

SOFTWARE

Adobe InDesign
Adobe Illustrator
Sketch-Up
Adobe Photoshop
Word
Excel
PowerPoint



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RACHAEL SHARKLAND

Outreach + Urban Design Specialist

Rachael has 8 years of experience working as a researcher, designer, and project manager on complex urban design projects including masterplans for higher education and health campuses and civic design and transit guidelines. Her background in dance, performance, and ecology inform her reverence for a holistic and participatory design process grounded in an ethics of resilience, equity, empathy, and agency. She is committed to design and leadership that promotes expression and well-being.



FEATURED PROJECTS

NORTH VENTURA COORDINATED AREA PLAN | PALO ALTO, CA

Managed a comprehensive, community-centered engagement and design process with the City of Palo Alto to transform a light industrial site into a mixed-use neighborhood with an accessible and equitable open space, housing, and transit strategy. Outreach included stakeholder and community advisory meetings, surveys, polls, digital mapping, and facilitated walking tours.

UCSF AT ZSFG DESIGN GUIDELINES | SAN FRANCISCO, CA

Engaged practicing clinicians, medical researchers and students, and patients in a collaborative space planning and design process for a new clinical research facility at the ZSFG campus. An extensive engagement process with both ZSFG and UCSF staff, faculty, students, and patients included interviews, visioning and advisory meetings, and medical facility tours.

BRANNAN LIFE SCIENCES BUILDING | SAN FRANCISCO, CA

Managed the space planning, urban design guidelines, and landscape design for a life sciences building in San Francisco that included artist studios and a public gallery at the ground floor.

EAST CUT DESIGN GUIDELINES | SAN FRANCISCO, CA

Collaborated with the East Cut Community Benefits District to create public space and right-of-way design guidelines for the East Cut neighborhood in anticipation of significant housing construction and traffic improvements around the new transbay terminal.

SOCIAL EQUITY AND INCLUSIVE OUTREACH TOOLKIT

Researched and prepared a toolkit for urban designers and architects adapted from the City of Seattle's Race and Social Justice Initiative that provides guidelines and tools for an inclusive, equity-based, and participatory public engagement process.

ADDITIONAL PROJECTS

MISSION ROCK DESIGN GUIDELINES | San Francisco, CA

GEORGE MARK HOUSE MASTERPLAN | San Leandro, CA

UCSF MISSION BAY DESIGN GUIDELINES | San Francisco, CA

ECOLOGY TOOLKIT FOR ARCHITECTS | PERKINS & WILL



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EXPERIENCE

PLAN to PLACE

Engagement Specialist
2021-present

PERKINS & WILL

Designer + Project Manager
2016-2020

GLS LANDSCAPE ARCHITECTURE

Designer + Project Manager
2014-2016

UNIVERSITY OF CONNECTICUT

Project Manager
2008-2010

DANCE EDUCATOR

2016-present

EDUCATION

Masters of Landscape Architecture

Harvard University, 2010-2013

Bachelor of arts

Philosophy, Literature, and History
Wesleyan University, 2003-2007

TRAINING

Integrative Counseling

Hakomi Institute, 2020-present

Equity + Anti-Racism Facilitation

Holistic Resistance, 2020-present

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Matt Maddox, MESM, AICP

Principal

Matt Maddox serves as a Principal within Rincon's Environmental Planning and Sustainability group. In this capacity, he is involved in a wide range of general plan updates, urban planning and land use studies, sustainable design review, air quality and greenhouse gas analysis, as well as community involvement and permitting activities. He has contributed to successful planning projects ranging from general plans and general plan elements to climate action plans, to sustainable design review, to greenhouse gas emissions analysis for various facilities under California's Cap and Trade Program. Mr. Maddox has developed a focus in the area of urban planning, sustainable design, and greenhouse gas analysis.

EDUCATION

MESM, Bren School of Environmental Science and Management, University of California, Santa Barbara

BA, Political Science, Cal Poly-San Luis Obispo

CERTIFICATIONS

American Planning Association – AICP Certified (#02663)

Accredited Greenhouse Gas Emissions Lead Verifier – California Air Resources Board

YEARS OF EXPERIENCE

14

EXPERIENCE

Rincon Consultants, Inc.
(2007 to present)

California State University, Sacramento, California
(2005 to 2006)

SELECT PROJECT EXPERIENCE

Project Manager, Town of Windsor (subconsultant to Mintier Harnish – Town of Windsor 2040 General Plan Update

Principal-in-Charge, City of Millbrae (subconsultant to Mintier Harnish) – General Plan Update, Priority Development Area, and Environmental Impact Report, Millbrae.

Principal-in-Charge, City of Carlsbad – Housing Element Update and General Plan Maintenance, Carlsbad

Principal-in-Charge, City of Union City (subconsultant to Mintier Harnish)– General Plan Update and Environmental Impact Report, Union City

Principal-in Charge, City of American Canyon (subconsultant to Mintier Harnish) – City of American Canyon General Plan Update, American Canyon

Principal-in Charge, Town of Rohnert Park (subconsultant to Mintier Harnish) – General Plan Update, Rohnert Park

Technical Advisor, City of Rancho Mirage – General Plan Update and Environmental Impact Report, Rancho Mirage

Policy Development, City of Sacramento – Climate Action Plan Update, Sacramento



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Della Acosta, AICP

SENIOR PLANNER

Della Acosta is a long-range planner leading Rincon's comprehensive and technical general plan services. Ms. Acosta manages comprehensive general plan and individual element updates, resiliency and sustainability planning, community engagement programs, and other planning projects. She has managed updates for numerous general plan updates across California and specializes in developing policy that achieves the community vision while fulfilling necessary regional, state, and federal requirements in ways that are contextual and implementable. She has led technical analysis, policy development, and community engagement with a focus on integrating planning efforts and using innovative techniques to gain diverse input and meet city goals.

EDUCATION

BA, City Planning, Sonoma State University

AFFILIATIONS

American Institute of Certified Planners (#31539)

SELECT DETAILED PROJECT EXPERIENCE

Project Manager, Town of Los Gatos (subconsultant to Mintier Harnish) – Town of Los Gatos General Plan Update

Project Manager, City of American Canyon (subconsultant to Mintier Harnish) – City of American Canyon General Plan Update

Project Manager, City of Pleasant Hill (subconsultant to Mintier Harnish) – City of Pleasant Hill General Plan Update

Project Manager, Town of Rohnert Park (subconsultant to Mintier Harnish) – Town of Rohnert Park General Plan Update

Assistant Project Manager, City of Morro Bay – PLAN Morro Bay

Project Manager, Mono County – Mono County Multi-Jurisdictional Hazard Mitigation Plan

Project Manager, City of Suisun City – Solano County Department of Health Partnerships to Improve Community Health

Policy Planner, City of Elk Grove – General Plan Update, Elk Grove

Policy Planner, Raimi + Associates – PLAN Hermosa General Plan and Local Coastal Program Update, City of Hermosa Beach.

Policy Planner, City of Hermosa Beach – General Plan and Local Coastal Program Update, City of Huntington Beach.

Associate Planner, County of Mendocino – Mendocino County Cannabis Combining Districts, County of Mendocino.





April Durham, PhD

ENVIRONMENTAL AND URBAN PLANNER

April Durham, PhD is an urban planner with expertise in policy development that contributes to effective, technically accurate long-range plans, housing elements, and arts and culture planning efforts. These inform land use policies as wide ranging as housing, sustainability, and active transportation. She has experience working on general plans, specific plans, and the environmental documents that accompany them, giving her a broad view on how to develop sound comprehensive plans.

Dr. Durham's public outreach experiences range from those with small communities to those conducted in larger cities and with regional jurisdictions. In addition to the traditional town hall-style meetings and interview protocols, Dr. Durham develops and implements innovative approaches to connecting stakeholders who have diverse perspectives and interests. She uses online platforms and social media outlets that reach a broad audience and can draw in especially invested stakeholders through their blogs, social media pages, and other venues. She also develops collaborative outreach projects, involving artists, writers, naturalists, and others who can help projects meet public involvement requirements with success.

EDUCATION

PhD, Comparative Literature
 and Media Studies,
 UC Riverside, 2013

MFA, Fine Art and Creative
 Writing, Art Center College of
 Design, Pasadena, 2000

BA, dual major Art and English,
 art history minor, California
 State University San
 Bernardino, 1997

AFFILIATIONS AND AWARDS

College Art Association
 Society for Science, Literature,
 and the Arts

Award for Outstanding Media
 Coverage for an Environmental
 Topic, 2019 Association of
 Environmental Professionals
 Communications Initiative
 Merit Award, 2019, American
 Planning Association, Central
 Coast Chapter

YEARS OF EXPERIENCE

18



SELECT PROJECT EXPERIENCE

LONG-RANGE PLANNING

Urban Planner, Environment & Conservation Element, City of Pleasant Hill General Plan Update, Pleasant Hill, California, November 2020

Urban Planner, Scenic Resources Background Report, Kern County General Plan Update, Bakersfield, California, September 2020

Urban Planner, Environment & Conservation Element, Town of Los Gatos General Plan Update, Los Gatos, California, June 2020

Urban Planner, City of Alameda General Plan Update, Alameda, California, September 2019

COMMUNITY OUTREACH

Community Outreach Coordinator, LEAP Grants in Fresno County, Fresno Council of Governments, Fresno County, California, November to December 2020

Community Outreach Coordinator, Eastside Corridor Study, Fresno Council of Governments, Fresno County, California, February to September 2020

Community Outreach Coordinator, Affordable Housing Requirement Rezoning Project, City of Selma, Selma, Fresno County, California, October-November 2019

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Torin Snyder, PG, CHG, TOR, QSD/P

Principal

Mr. Snyder, PG, CHG, QSD/P, is a professional geologist with over 20 years of experience, which includes working in a variety of geological conditions throughout California. His scientific knowledge of geology and experience in the earth science industry enables him to prepare useful hydrogeological research, accurate environmental assessments, and appropriate approaches for remediation. His experience includes hydrology and water quality, vadose zone hydrology environmental investigations, hydrogeology environmental investigations, hazardous waste investigations, and soil and groundwater remediation/mitigation. As a Qualified Storm Water Pollution Prevention Plan (SWPPP) Trainer of Record, Developer, and Practitioner, he has provided storm water compliance services for major infrastructure projects throughout California. In addition, Mr. Snyder has prepared and implemented compliance programs set forth by Mitigation Monitoring and Reporting Plans for large infrastructure projects.

EDUCATION

BS, Soil Science, California Polytechnic State University, San Luis Obispo

REGISTRATIONS

Professional Geologist, California (#8663)
Certified Hydrogeologist, California (#950)

CERTIFICATIONS

Qualified SWPPP Developer/Practitioner Trainer of Record
Qualified SWPPP Developer/Practitioner (#649)
40 Hour HAZWOPER Certification

YEARS OF EXPERIENCE

20

SELECT PROJECT EXPERIENCE

Principal in Charge, Mid-Coast Transit Constructors – Mid-Coast Corridor Transit Project, San Diego

Project Manager, Flatiron-Skanska-Stacy Witbeck Joint Venture – North Coast Corridor Project, Encinitas

Project Manager, HDR/ Caltrans – Advanced Wetland Delineation Course, San Rafael

Project Director, Tutor Perini/O&G – Purple Line Extension 2, Los Angeles, City of Los Angeles

Principal in Charge, Los Angeles County Metropolitan Transportation Authority (Subconsultant to WSP) – West Santa Ana Branch Transit Corridor Environmental Study, Draft Hazardous Materials Impact Analysis Report, Los Angeles County

Principal-in-Charge, City of Los Angeles Bureau of Engineering (subconsultant to Skanska-Stacy and Witbeck) – 6th Street Viaduct Replacement, Los Angeles

Lead Analyst Supplemental EIR/EIS, High Speed Rail Authority/subcontract to TY-Lin California – Bakersfield F Street Station Alignment, Central Valley

Principal SWPPP Review, Harris & Associates and PGH Wong – CP-1 High Speed Rail, Central Valley Counties/Cities, California
Project Manager, Kiewit Shea Desalination – Carlsbad Desalination Project, Carlsbad



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Appendix B: Cost Proposal

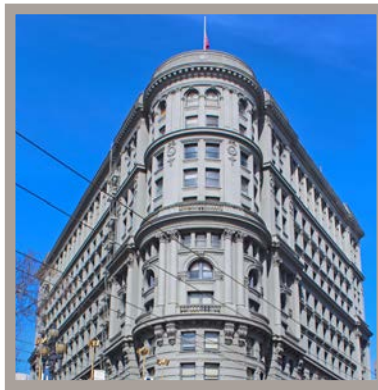
City of Piedmont 6th Cycle Housing Element Update	Principal		Director		Senior Associate		Associate		LWC Total		Dave Javid		Paul Kronser		Rachael		Plan to Place Total		Principal I		Supervisor I		Senior Professional I		Professional IV		Professional I		Senior GIS Specialist		Technical Editor		Production Specialist		Clerical		Rincon Total		PROJECT TOTAL		
	\$285		\$225		\$185		\$150				\$215		\$165		\$150				\$227		\$201		\$165		\$149		\$108		\$140		\$115		\$91		\$77						
	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	
Task 1 Project Initiation	2	\$ 570	4	\$ 900	12	\$ 2,220	12	\$ 1,800	30	\$ 5,490	8	\$ 1,720	8	\$ 1,320	-	\$ -	16	\$ 3,040	4	\$ 908	\$ -	-	6	\$ 990	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	10	\$ 1,898	56	\$ 10,428	
1.1 Kickoff Meeting	\$ -		2	\$ 450	8	\$ 1,480	12	\$ 1,800	22	\$ 3,730	4	\$ 860	16	\$ 2,640	4	\$ 600	24	\$ 4,100	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	46	\$ 7,830	
1.2 Data Collection	40	\$ 11,400	60	\$ 13,500	100	\$ 18,500	24	\$ 3,600	224	\$ 47,000	30	\$ 6,450	30	\$ 4,950	-	\$ -	60	\$ 11,400	4	\$ 908	-	\$ -	18	\$ 2,970	6	\$ 894	\$ -	-	\$ -	-	\$ -	-	\$ -	-	6	\$ 462	34	\$ 5,234	318	\$ 63,634	
1.3 Project Management and Coordination	8	\$ 2,280	24	\$ 5,400	40	\$ 7,400	8	\$ 1,200	80	\$ 16,280	-	\$ -	-	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	80	\$ 16,280		
1.4 Coordination with HCD	50	\$ 14,250	90	\$ 20,250	160	\$ 29,600	56	\$ 8,400	356	\$ 72,500	42	\$ 9,030	54	\$ 8,910	4	\$ 600	100	\$ 18,540	8	\$ 1,816	-	\$ -	24	\$ 3,960	6	\$ 894	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	6	\$ 462	44	\$ 7,132	500	\$ 98,172
Subtotal Task 1																																									
Task 2 Community Outreach and Engagement	2	\$ 570	6	\$ 1,350	8	\$ 1,480	-	\$ -	16	\$ 3,400	8	\$ 1,720	20	\$ 3,300	4	\$ 600	32	\$ 5,620	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	48	\$ 9,020	
2.1 Engagement Strategy	2	\$ 570	2	\$ 450	4	\$ 740	-	\$ -	8	\$ 1,760	12	\$ 2,580	16	\$ 2,640	4	\$ 600	32	\$ 5,820	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	40	\$ 7,580	
2.2 Project Messaging	-	\$ -	6	\$ 1,350	12	\$ 2,220	12	\$ 1,800	30	\$ 5,370	12	\$ 2,580	24	\$ 3,960	16	\$ 2,400	52	\$ 8,940	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	82	\$ 14,310	
2.3 Outreach Materials	-	\$ -	6	\$ 1,350	12	\$ 2,220	16	\$ 2,400	34	\$ 5,970	16	\$ 3,440	36	\$ 5,940	16	\$ 2,400	68	\$ 11,780	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	102	\$ 17,750	
2.4 Project Website	10	\$ 2,850	18	\$ 4,050	30	\$ 5,550	20	\$ 3,000	78	\$ 15,450	56	\$ 12,040	70	\$ 11,550	35	\$ 5,250	161	\$ 28,840	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	239	\$ 44,290	
2.5 Housing Advisory Committee	8	\$ 2,280	24	\$ 5,400	48	\$ 8,880	32	\$ 4,800	112	\$ 21,360	40	\$ 8,600	50	\$ 8,250	30	\$ 4,500	120	\$ 21,350	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	232	\$ 42,710	
2.6 Community Workshops (4)	4	\$ 1,140	8	\$ 1,800	16	\$ 2,960	10	\$ 1,500	38	\$ 7,400	24	\$ 5,160	21	\$ 3,465	9	\$ 1,350	54	\$ 9,975	3	\$ 681	-	\$ -	3	\$ 495	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	6	\$ 1,176	98	\$ 18,551	
2.7 Planning Commission Meetings (3)	4	\$ 1,140	8	\$ 1,800	16	\$ 2,960	10	\$ 1,500	38	\$ 7,400	24	\$ 5,160	21	\$ 3,465	9	\$ 1,350	54	\$ 9,975	3	\$ 681	-	\$ -	3	\$ 495	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	6	\$ 1,176	98	\$ 18,551	
2.8 City Council Meetings (3)	30	\$ 8,550	78	\$ 17,550	146	\$ 27,010	100	\$ 15,000	354	\$ 68,110	192	\$ 41,280	258	\$ 42,570	123	\$ 18,450	573	\$ 102,300	6	\$ 1,362	-	\$ -	6	\$ 990	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	12	\$ 2,352	939	\$ 172,762
Subtotal Task 2																																									
Task 3 Technical Studies and Issues Evaluation	8	\$ 2,280	16	\$ 3,600	32	\$ 5,920	48	\$ 7,200	104	\$ 19,000	\$ -	-	\$ -	-	\$ -	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	104	\$ 19,000		
3.1 Housing and Special Housing Needs	4	\$ 1,140	10	\$ 2,250	24	\$ 4,440	48	\$ 7,200	86	\$ 15,030	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	86	\$ 15,030		
3.2 Housing Constraints	-	\$ -	2	\$ 450	8	\$ 1,480	32	\$ 4,800	42	\$ 6,730	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	42	\$ 6,730		
3.3 Current Housing Element Review	-	\$ -	4	\$ 900	12	\$ 2,220	16	\$ 2,400	32	\$ 5,520	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	32	\$ 5,520		
3.4 Housing Resources Assessment	4	\$ 1,140	8	\$ 1,800	20	\$ 3,700	32	\$ 4,800	64	\$ 11,440	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	64	\$ 11,440		
3.5 Goals, Polies, Programs, and Quantified Objectives	16	\$ 4,560	40	\$ 9,000	96	\$ 17,760	176	\$ 26,400	328	\$ 57,720																															
Subtotal Task 3																																									
Task 4 Sites Inventory	12	\$ 3,420	40	\$ 9,000	60	\$ 11,100	80	\$ 12,000	192	\$ 35,520	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	192	\$ 35,520		
4.1 Housing Program Options	8	\$ 2,280	24	\$ 6,840	32	\$ 9,120	48	\$ 13,680	112	\$ 31,920																															
4.2 Site Inventory, RHNA	6	\$ 1,710	8	\$ 2,280	20	\$ 5,700	40	\$ 11,400	74	\$ 21,090																															
4.3 Visualizations	26	\$ 7,410	72	\$ 18,120	112	\$ 25,920	168	\$ 37,080	378	\$ 88,530																															
Subtotal Task 4																																									
Task 5 Affirmatively Furthering Fair Housing	4	\$ 1,140	12	\$ 2,700	20	\$ 3,700	32	\$ 4,800	68	\$ 12,340	\$ -	-	\$ -	\$ -	-	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	-	\$ -	68	\$ 12,340		
5.1 Affirmatively Furthering Fair Housing	4	\$ 1,140	12	\$ 2,700	20	\$ 3,700	32	\$ 4,800	68	\$ 12,340																															
Subtotal Task 5																																									
Task 6 General Plan Amendments	-	\$ -	4	\$ 900	8	\$ 1,480	8	\$ 1,200	20	\$ 3,000																															
6.1 Environmental Hazards Element and Natural Resources and Sustainability Element Amendment	4	\$ 1,140	8	\$ 1,800	24	\$ 4,440	48	\$ 7,200	84	\$ 12,600																															
6.2 Other Text Amendments	6	\$																																							

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SAN LUIS OBISPO



SAN FRANCISCO



LOS ANGELES



EXHIBIT B

Compensation

CITY shall pay CONSULTANT for the Services on a cost reimbursement basis, up to the Cost Ceiling (as defined in Section 2.1 of the Agreement). CONSULTANT agrees to use appropriate methods to contain its fees and costs under this Agreement. Compensation shall include only the following costs, which shall all count toward the Cost Ceiling:

1. Direct Labor

Direct labor costs shall be the total number of hours worked on the job by each employee times the agreed hourly rate for such employee's labor as set forth in Hourly Rates listed on page 50 of the Scope of Work attached as Exhibit A to the Agreement. CITY will pay all personnel at their regular straight-time rate, including any work performed on overtime or on holidays or weekends.

2. Subconsultant Costs

Subconsultant services shall be billed at cost plus a 10 percent markup. CONSULTANT shall provide a copy of each subconsultant's invoice for which it seeks payment from CITY with any invoice in which such payment is requested.

3. Other Direct Costs

The following categories of costs are eligible for reimbursement, which shall be made at the actual cost to CONSULTANT without any additional mark-up:

a. Reasonable living and traveling expenses of employees when away from home office on business in its prosecution of the Services. CONSULTANT must have prior approval of CITY to be reimbursed for these expenses.

b. Automobile expenses for personal vehicle use, if necessary, at the IRS approved mileage rate.

c. Reproduction of drawings and specifications by CONSULTANT as required under this Agreement, at rates prevailing in this community for bulk reproduction or at other reasonable rates approved by CITY.

d. Special overnight delivery or messenger services.

Payments to CONSULTANT for reimbursable costs/expenses will be made only after the specific costs/expenses have been incurred and CONSULTANT has submitted substantiating documentation, such as copies of paid invoices or other documentation confirming that such costs/expenses have been incurred.