

# Work Scope

## TASK 0 – PROJECT KICK-OFF MEETING AND PROJECT MANAGEMENT

### Task 0.1 *Project Kick-off*

Contractor shall communicate with City staff via phone and email throughout the project. Contractor shall prepare for and attend a virtual kick-off meeting with the City to exchange information and initiate work. At the meeting Contractor shall:

- Determine staff contact protocol.
- Review and finalize the scope of work and schedule.
- Review Housing Element legal requirements and California Department of Housing and Community Development (HCD) practices.
- Identify stakeholders.
- Provide a list of data needs.

#### *Task 0.1 Deliverables:*

- Kickoff meeting agenda, data needs list, list of stakeholders, and meeting minutes (electronic copies).
- Agenda and notes for subsequent calls with staff (electronic copies).

### Task 0.2 *Project Management and Coordination*

Contractor shall communicate with City staff via phone and email throughout the project. In addition, Contractors' project team shall:

- 1) Provide monthly email progress reports to the City
- 2) Lead Zoom check-in discussions once a month with one or two appropriate team members.
- 3) Provide an Internet-based folder for all project materials accessible to the City and consultants.
- 4) Reallocate any remaining funds to other tasks within the scope when tasks are completed under budget.
- 5) Send all draft documents through quality control in advance of submitting to the City for review.

#### *Task 0.2 Deliverables:*

- Monthly progress report accompanying the invoice.
- Project discussion once a month via Zoom (assumed 10 check-in meetings).

## TASK 1 - LAND INVENTORY

Contractor shall work with the City to assess the availability of land allowing residential development in the City and as a subset of the list of suitable sites, a list of Housing Priority Sites will be developed by the Contractor. This analysis will be used during Task 2, Housing Action Plan, and in Task 3 as part of the Housing Element Update.

### Task 1.1 *Draft RHNA Land Inventory*

The City's current Regional Housing Needs Allocation (RHNA) assigned for the 2015-2023 time period is 11,824. San Joaquin County Council of Governments (SJCOG) is currently working with the cities in their region on the draft RHNA for the 2023-2031 planning period. Once the RHNA for the 2023-2031 timeframe is available, Contractor shall analyze the City's ability to

address those numbers during the eight-year timeframe of the next Housing Element. We will use the current vacant and underutilized sites inventory from the Housing Element and work with City staff to determine which sites are still available and meet HCD's land inventory criteria. We will then work with City staff to determine if additional sites are needed to meet the RHNA and to ensure the City does not fall into a no-net-loss situation.

Contractor realizes that identifying adequate sites can be a large undertaking. Contractor shall use the current sites inventory as a starting point to determine which sites are still viable RHNA sites based on new state law requirements, including, but not limited to, the following:

- Additional analysis for sites smaller than one-half acre, larger than 10 acres
- Additional analysis for underutilized, nonvacant sites
- Identify sites included in the past housing element cycles that may require changes to zoning to continue listing in the Housing Element sites inventory
- Identify if sites are publicly owned
- Indicate whether a site has available or planned and accessible infrastructure

It is not currently anticipated that rezoning will be needed to meet the RHNA. If rezoning is needed Contractor shall work with the City to analyze sites that would be suitable for residential development if their zoning was changed.

For this task, Contractor shall:

- **Incorporate the Regional Housing Needs Allocation** prepared by SJCOG for the 2023-2031 cycle.
- **Document potential sites.** Contractor shall prepare an inventory, map, and analysis clearly illustrating Stockton's capacity to accommodate the new RHNA. In keeping with state law, Contractor shall document the realistic development capacity of each site and will prepare a map showing all identified sites.
- **Investigate alternative RHNA credits.** This includes analyzing the capacity for alternative RHNA credits for accessory dwelling units, guest quarters, preservation of existing at-risk affordable housing projects, and other similar, nontraditional RHNA credit opportunities.
- **Ensure sites affirmatively further fair housing.** Contractor shall work with City staff to determine if the sites identified in the inventory are located throughout the community in a manner that affirmatively furthers fair housing. The analysis done under Task 1 will be a preliminary assessment of whether the sites are consistent with state fair housing law. The full fair housing assessment will be conducted as part of Task 3.

Contractor shall complete an analysis of nonvacant sites to address a portion of the RHNA. As part of this analysis, Contractor shall analyze the realistic development potential within the planning period by considering the extent that a nonvacant site's existing use impedes additional residential development, the jurisdiction's past experience converting existing uses to higher-density residential development, market trends and conditions, and regulatory or other incentives or standards that encourage additional housing development on any nonvacant sites.

Contractor shall work to determine if parcels included in the inventory have sufficient water, sewer, and dry utilities (electricity, internet) supply available and accessible to support housing development. Contractor shall review existing general plan programs or other mandatory programs or plans to secure sufficient water, sewer, and dry utilities supply to support housing development on the site. The analysis shall include sufficient detail to determine whether the service levels of water delivery/treatment systems and sewer treatment facilities are sufficient and have capacity to accommodate development on all identified sites in order to accommodate the RHNA.

#### *Task 1.1 Deliverables:*

- Excel workbook with Draft RHNA land inventory and PDF of workbook.

## Task 1.2 Conduct Stakeholder Outreach

Contractor shall conduct stakeholder outreach to receive input on the potential RHNA Land Inventory. After preparing a preliminary update to the existing Housing Element land inventory and adding additional suitable parcels, Contractor shall hold two (2) workshops to receive input about the potential list of sites. One workshop shall be virtual and one in-person with the same content presented. Maps or other tools shall be decided on with City staff to facilitate the presentation of the draft land inventory.

### Task 1.2 Deliverables:

- Attendance at one virtual workshop and one in-person workshop. Contractor shall have a Spanish-speaking staff person attend the workshops to translate if desired by the City.
- Promotional flyer and announcements (in English and Spanish)
- PowerPoint presentation (PowerPoint can be translated into Spanish for posting on the City website if desired)
- Other materials, including maps or other suitable materials for the in-person workshop
- Summary notes incorporated into the Housing Element

## Task 1.3 Final RHNA Land Inventory

Based on feedback received from City staff and the public, Contractor shall revise the RHNA Land Inventory. The final list of sites that is suitable to meet the RHNA will need to be arrived at while considering and addressing the comments received.

### Task 1.3 Deliverables:

- Revised Excel workbook with Final RHNA land inventory and PDF of workbook.

## Task 1.4 Housing Priority Site Analysis

A subset of the RHNA Land Inventory sites shall be designated Housing Priority Sites and analyzed further by Contractor as part of the Housing Action Plan in Task 2. Contractor shall use the existing Housing Priority Site list the City has created as a starting point. Housing priority sites shall be sites that are best candidates for a variety of housing development during the Housing Element planning period, including for affordable housing. These will also be sites that can serve as a catalyst for economic and neighborhood-serving improvements. The list of sites identified by Contractor shall exceed the ultimate number the City would like to arrive at for the list of Housing Priority Sites so that further outreach and review can refine the list to reach a final list of Housing Priority Sites.

### Task 1.4 Deliverables:

- Draft subset of sites from the Final RHNA land inventory (Excel workbook) that are proposed to be Housing Priority Sites.

## Task 1.5 Identify Partnerships

Contractor shall work with the City to reach out to owners of the Housing Priority Sites identified on a draft list that are not owned by the government to explore their interest in housing development and potential partnerships. A partnership would increase the attractiveness of the site for development in the near-term and establish a working relationship to explore further possibilities for the site as part of the Housing Action Plan under Task 2.

*Task 1.5 Deliverables:*

- Contractor shall assist the City with mailers, emails, and phone calls to the Draft Housing Priority Sites List property owners. If requested by the property owners, Contractor shall hold a meeting with the property owner to discuss their interest in residential development and working further with the City to position the site as a development-ready location.

**Task 1.6      *Final Housing Priority Sites***

Based on feedback received from City staff and property owners, Contractor shall revise the Housing Priority Sites list. Next steps to develop information and analyze these sites will occur in Task 2 as part of the Housing Action Plan.

*Task 1.6 Deliverables:*

- Final subset of sites from the Final RHNA land inventory (Excel workbook) that are proposed to be Housing Priority Sites.

**TASK 2 – HOUSING ACTION PLAN**

Contractor shall prepare a Housing Action Plan (HAP). HAP shall serve as a toolkit that provides the City with an overarching strategy document to implement housing policies, improve existing policies, develop and implement new policies pertaining to increased housing production, housing standards, best practices, and means to administer the programs and efforts within a set timeframe. The HAP “toolkit” shall encompass existing housing plans and policy objectives to increase overall housing production in the City of Stockton. The toolkit shall be based on an assessment and determination of housing needs by type (emergency, supportive, permanent) and by income level (very low-, low-, moderate-, and above moderate-income). The HAP toolkit shall identify areas that allow each housing type, identify priority housing sites for catalytic projects, identify a possible list of housing partnerships and funding, based on site-specific and regional market analysis. The end product of this task shall be written and structured to be read and understood by the broad public, City staff, elected and appointed officials, local community-based organizations, housing developers, and regional partners. To accomplish these objectives, the Contractor will complete the following sub-tasks.

**Task 2.1      *Existing Inventory and Assessment***

As a first step in developing the HAP, Contractor shall compile a comprehensive inventory of the existing housing policies and available background information. Following is a description of sub-tasks.

**2.1.1    Review Plans, Reports, Studies, other Relevant Documentation**

City staff shall provide, and Contractor shall review, copies of relevant plans, reports, studies, and other relevant documentation of housing conditions, goals, and objectives in Stockton. This shall include, but shall not be limited to, background information coming out of the parallel Housing Element Update process, as well as existing policies, plans, and studies, including the City’s HUD Consolidated Plan and Analysis of Impediments to Fair Housing.

**2.1.2    Review Gaps in Policy Recommendations**

After gathering and reviewing the relevant background information, Contractor shall prepare a summary of the City’s existing housing policy, organized by type of housing and income level addressed and will highlight any gaps in housing policy for housing types and/or income levels that are not addressed in current policy. Contractor shall conduct interviews as part of Task

2.1.7 to help to identify existing gaps in affordable housing policy. Once this task is complete Contractor will meet with the City about any identified gaps and whether any of them could be addressed by the City in a near-term timeframe.

### **2.1.3 Equity and Anti-Displacement Policies, Strategies, and Best Practices**

The Contractor will summarize the City's current equity and anti-displacement policy structure with a goal of identifying gaps. The analysis will include a brief review of best practices implemented in other jurisdictions that align with the issues identified in Stockton through prior research commissioned by the City. Contractor shall conduct interviews as part of Task 2.1.7 to help to identify existing gaps in the City's housing policy pertaining to equity and anti-displacement. Once this task is complete Contractor will meet with the City about any identified gaps and whether any of them could be addressed by the City in a near-term timeframe.

### **2.1.4 Prepare Overview of Existing Plans**

From the Task 2.1.2 summary of existing housing policies, Contractor shall prepare a concise overview of the existing policies and programs and the implementation tools that the City currently uses to achieve stated goals and objectives. Contractor shall request information from City staff regarding the achievements or outcomes from the existing policies (including implementation and results of the existing Housing Element).

### **2.1.5 Review and Prepare Overview of Barriers to Housing Production**

Contractor shall prepare an overview of barriers to housing production in Stockton. Interviews conducted as part of Task 2.1.7 shall help to identify real or perceived barriers to local housing production. Based on feedback from key informants (as identified in Task 2.1.7) regarding the perceived barriers to housing production that the City may be able to influence, Contractor shall conduct follow-up research to try to verify the issues and identify potential solutions that could be incorporated into the HAP. This information may inform the subsequent preparation of the assessment of governmental and nongovernmental constraints to housing in the Housing Element Update process that will follow.

### **2.1.6 Inventory of Specialty Tools/Incentives**

To begin the process of thinking about tools that could be utilized in Stockton to help facilitate production of housing of different types to serve different household income levels, Contractor will compile an inventory of different tools and incentives that have been used in other communities. This inventory will include a brief description of each tool, along with pertinent information about the type and/or income level of housing that they can assist, any special requirements (e.g., voter approval, adoption of plans, other local governmental actions) for use in Stockton, as well as identification of potential funding sources and/or other resources needed for implementation. Examples of the types of tools/incentives to be considered include transfer of development rights, tax increment financing/EIFDs/CRIAs, land trusts, public private partnerships, use of publicly owned land, etc. Interviews to be conducted as part of Task 2.1.7 will help to inform this task.

### **2.1.7 Review and Prepare Overview of Existing Incentives**

Contractor will review and prepare an overview of the City of Stockton's existing incentives and tools for facilitating housing production. This will identify the tools that the City already has in its toolkit to help increase housing production. Comparing this information with the information presented in Task 2.1.5 will help to identify gaps in the City's toolbox and ideas for new tools that the City could consider adding to address specific needs that the study identifies.

## 2.1.8 Conduct Interviews

To support the identification of housing needs, constraints, effectiveness of policies and programs, and possible new incentives or tools to add, Contractor will conduct interviews with up to 12 key informants who are knowledgeable about local housing needs; the effectiveness of existing policies, programs, and incentives; and potential new tools or resources that may be needed to achieve local goals. These may include for-profit developers, nonprofit housing developers, landholders, social service agencies, CBOs, and other relevant stakeholders to be identified in consultation with City staff.

### Task 2.2 *Draft Housing Action Plan*

Contractor will synthesize the information generated in Task 2.1, Existing Inventory and Assessment, to prepare a Draft HAP. Following are the specific sub-tasks that the consultant team will complete.

#### 2.2.1 Review and Provide Existing Context

Contractor will prepare a brief Market Conditions and Demographics section as a preface to the HAP. The purpose of this information will be to set the context for the HAP, highlighting key pieces of information, such as the existing affordability gaps in the local housing market (e.g., which income groups are unable to afford market-rate housing).

#### 2.2.2 Include Various Types/Tiers of Housing

Building on the work in Task 2.2.1, Contractor will also include in the Market and Demographics section an identification of specific socioeconomic groups that are under-served (e.g., under-served needs by housing type), including:

- 1- Emergency Housing (homeless)
- 2- Supportive Housing (state licensing required)
- 3- Permanent
  - a. By Income
  - b. By Type (i.e., density, mass, etc)

Contractor's research on this topic can serve as a starting point for the Housing Needs Assessment/Assessment of Fair Housing that will be prepared as part of the Housing Element Update process. The findings from this task will help to determine the types of sites that should be identified as catalyst sites for further study in Task 2.2.3, based on the magnitude of unmet needs in various categories that are identified and the site suitability criteria associated with different housing types. (E.g., different types of sites and locations are needed for emergency shelters versus for market rate permanent housing.) In addition to the needs for affordable housing to be addressed in Task 2.2.1, to the extent possible, Contractor will also identify specific housing niches that present opportunities for the City to expand housing production, including specialty types such as transit-oriented development (TOD) and strengthening of the City's Missing Middle housing toolkit.

#### 2.2.3 Homelessness Resource Inventory

Update and summarize the current inventory of resources to assist persons experiencing homelessness as documented in the Consolidated Plan and associated Comprehensive Annual Performance Reports, as well as any relevant documents maintained by the Continuum of Care (CoC). Contractor shall conduct interviews as part of Task 2.1.7 to help to identify existing gaps in service. Once this task is complete Contractor will meet with the City about any identified gaps and whether any of them could be addressed by the City in a near-term timeframe.

## 2.2.4 Case Studies, Pro Forms, and Preplanning Activities for Catalyst Sites

In collaboration with City staff, Contractor will take the lead in preparing a section of the HAP that will focus on potential housing projects on up to 20 catalyst housing sites, drawing from the Sites Inventory to be completed in Task 1. The budget for this task assumes that the Sites Inventory task will provide basic site information, such as APN, existing zoning and general plan designation, and existing land uses. Contractor and City staff will collaborate to review and refine the Sites Inventory list to a maximum of 20 and that City staff and Contractor will further collaborate to identify potential zoning and General Plan designation changes and targeted residential development density if not already identified in the Sites Inventory. City staff will provide any available information regarding the availability of utilities to serve the targeted development type, presence of any site constraints. Contractor will conduct limited additional assessment of each site to ascertain key factors such as existing site conditions, neighborhood context, and other factors relevant to the potential future development with the targeted housing type. For each site, Contractor will preliminarily identify a potential project type that would both address a specific segment of identified local housing needs and also be compatible with the site's locational characteristics, site conditions, and development targeted in the Housing Element Sites Inventory. Contractor will then provide a pro-forma financial feasibility analysis that is based on one of up to five development prototypes (to be defined in consultation with City staff), modified to fit the size of the specific catalyst site being analyzed. The pro-forma analysis will identify the financial feasibility of the targeted development type and will identify any funding gap that may need to be addressed to achieve financial feasibility. In addition, for each catalyst site, Contractor will briefly outline a set of high-level "next steps" towards housing development. This will include necessary actions such as rezone/General Plan amendments, California Environmental Quality Act (CEQA) review, infrastructure evaluations, site remediation investigations, and other site-specific actions that would need to be undertaken to pre-plan and prepare shovel-ready housing sites. Depending on the site ownership and the type of development envisioned, these next steps may include actions such as issuing RFPs for City-owned properties, conducting outreach to owners of privately-owned sites, etc.

## 2.2.5 Define Housing "Priority Areas"

Based on the findings from prior tasks, Contractor will identify a range of potential housing priority areas within the City of Stockton. The objective will be to delineate geographic areas within the City of Stockton that should be targeted for location-focused policies, programs, or actions to support increased housing production. For example, this could include sub-areas where there are particular housing opportunities due to the presence of catalyst sites, redevelopment potential, areas found to have geographically focused needs or opportunities for production (or rehabilitation) of certain housing types, and areas where certain tools, incentives, and/or partnerships may be particularly effective because of their specific characteristics.

Contractor will assemble the Draft HAP from the components described in the Task 2.2 sub-tasks into a single, cohesive action plan document. Contractor will provide the Draft HAP in electronic format for review and comment by City staff. Contractor will be available to discuss the Draft HAP with City staff via web meeting and will answer any questions.

## Task 2.3 *Final Housing Action Plan*

Upon receipt of a single, consolidated set of City staff comments on the Draft HAP, Contractor will prepare revisions as appropriate, add additional elements, and finalize the plan. Following are the specific sub-tasks that Contractor will complete:

### 2.3.1 Refinement of Draft Housing Action Plan

Contractor will revise the Draft HAP in response to the City's written comments and will add the following additional components. Contractor will be available to discuss the revised HAP with City staff, focusing on the new components. Upon receipt of a single, consolidated set of City staff comments on the new components, Contractor will make revisions and submit the Final HAP for the City's use. Contractor will provide the revised and final HAP documents in Adobe PDF format.

### 2.3.2 Create Action Steps/Implementation Matrix

Based on City staff input on the Draft HAP, including staff feedback on potential tools and incentives to add to the City's housing toolbox, Contractor will prepare an implementation matrix that groups and categorizes the tools/strategies/actions and, within each grouping, prioritizes implementation based on identified needs and opportunities. For each recommended tool/strategy/action, Contractor will also identify roles and responsibilities for implementation. This will focus on the responsible City department(s) but will also identify potential outside partners, if applicable.

### 2.3.3 Recommend Financing Mechanisms

In the process of refining the Draft HAP, the Contractor will also add recommendations for financing mechanisms to assist with housing development. This will include consideration of short-term and long-term financing solutions as well as traditional affordable housing financing mechanisms and any new/emerging financing mechanisms that appear to be a good fit for Stockton's needs and opportunities.

## TASK 3 – 2023 – 2031 HOUSING ELEMENT AND SAFETY ELEMENT UPDATE

### Task 3.1 Project Schedule Development

The City of Stockton Housing Element is due to adopt by December 31, 2023. Contractor recommends starting the Housing Element efforts beginning in July 2022 to meet the December 2023 due date shown in Table 2. The following is a high-level schedule outlining the major milestones associated with the Housing Element and Safety Element Updates, Housing Action Plan, and associated CEQA requirements. Contractor will work with City staff to confirm and finalize the schedule should we have the opportunity to negotiate a contract with the City.

**TABLE 1** PROPOSED SCHEDULE

Task	Proposed Timeline
<b>Task 0: Project Kick-off Meeting and Project Management</b>	
Project Kick-off Meeting	March 2022
<b>Task 1: Land Inventory</b>	
Land Inventory Analysis	March – April 2022
Draft RHNA Land Inventory	May 2022
Stakeholder Outreach for Land Inventory	May – June 2022
Final RHNA Land Inventory	July 2022
Housing Priority Site Analysis	May – July 2022
Draft Housing Priority Sites	July 2022
Identify Potential Housing Priority Sites Partnerships	July – August 2022
Final Housing Priority Sites	August 2022



<b>Task 2: Housing Action Plan</b>	
Existing Inventory & Assessment	July – August 2022
Draft Housing Action Plan	November 2022
Final Housing Action Plan	January 2023
<b>Tasks 3, 4 and 5: 2023-2031 Housing Element and Safety Element and Associated CEQA Review and Outreach</b>	
Existing Conditions and Needs	September 2022
Review of Previous Housing Element	October – November 2022
Stakeholder Consultations	November 2022
Community Meetings	November 2022 – January 2023
Administrative Draft Housing Element and Safety Element	February 2023
Receive City Review of Administrative Drafts	March 2023
Public Draft Housing Element and Safety Element	April 2023
Meeting with Planning Commission to review Draft Housing Element and Safety Element	April 2023
Start on General Plan EIR Addendum	April – May 2023
Submit Draft Housing Element to HCD for 60-Day Review	May 2023
Call with HCD to received comments on Draft Housing Element	June 2023
Draft Addendum to City for Review	June 2023
Receive Findings Letter from HCD	July 2023
Revise Housing Element and submit to HCD for Second 60-day Review	August 2023
Receive Findings Letter from HCD	October 2023
Final Addendum to City	October – November 2023
Planning Commission Review of Adoption Draft Housing Element and Safety Element	November 2023
City Council Review of Adoption Draft Housing Element and Safety Element	By December 15, 2023

Submit Adopted Housing Element to HCD for 90-Day Review	December 2023
HCD 90-Day Certification Review	December 2023 – March 2024

### Task 3.2 Existing Conditions and Needs

Currently, HCD is not offering a streamlined review process. If that type of process becomes available before submittal of the Draft Housing Element to HCD, Contractor will look into whether it is an option. Submittal for HCD review will also comply with Assembly Bill (AB) 215, which was recently approved and will go into effect in 2022.

#### Task 3.2.1 Document Review

Contractor will review documents relevant to the Housing Element Update to gain an understanding of local conditions and needs. Documents will include, but are not limited to:

- 2015–2023 Housing Element
- All past communication with HCD, including any findings letters
- General Plan
- Housing Element annual progress reports
- Zoning code
- Any other applicable programs and ordinances

#### Task 3.2.2 Review of Previous Housing Element

Contractor will work closely with the City to determine the status, effectiveness, and appropriateness of the 2015–2023 housing programs. We will gather and document all available information regarding specific accomplishments. We will identify content to drop, change, or add. Findings from the evaluation will be detailed in a matrix to be included in the draft Housing Element and used as a basis for program revisions for the remainder of the planning period. Contractor will send the review matrix to City staff to provide input before including it in the Administrative Draft Housing Element.

##### *Task 3.2.2 Deliverable:*

- Included in Administrative Draft, Review of Previous Housing Programs chapter.

### Task 3.3 Regional Housing Needs Allocation Assessment (RHNA)

The Regional Housing Needs Assessment related part of this task will be completed as part of Task 1, Land Inventory.

In addition, during Housing Element preparation, Contractor will conduct a built environment inventory of buildings in Downtown Core and the 3 neighborhoods. This task will involve review of existing data from the City regarding building occupancy and follow up research and outreach to property owners to confirm information about occupancy and vacancy of buildings. This task will happen via internet research and email and phone outreach. On-the-ground surveying is not anticipated.

##### *Task 3.3 Deliverable:*

- Memo with list of buildings in Downtown Core and 3 neighborhoods and the available data regarding their occupancy status.

### Task 3.4 Assessment of Housing Needs

#### Task 3.4.1 Assessment of Housing Needs Document

Contractor will create a housing needs analysis document pursuant to Government Code Section 65583 with data from the HCD pre-approved data packet, 2020 U.S. Census data, American Community Survey, and other relevant sources. Contractor will coordinate with staff to analyze housing needs and housing conditions using state-approved criteria. The housing needs analysis will include the following.

- **Population and Demographics:** Population trends and projections, race and ethnicity, and population age.
- **Household Characteristics:** Number, size, and type of existing households, and characteristics of lower-income households (including extremely low).
- **Employment and Income:** Employment by industry, occupation of employed residents, and income trends.
- **Housing Stock Characteristics:** Housing types and conditions, overcrowded households, and vacancy rates.
- **Housing Costs and Affordability:** Home sale price trends, rental costs, affordability for households at all income levels, and overpayment.
- **Special Housing Needs:** Special housing needs of persons with disabilities (including persons with developmental disabilities), seniors, large households, female-headed households.
- **At-Risk Housing:** Inventory and analysis of existing affordable units at risk of converting to market rate during the planning period.
- **Opportunities for Energy Conservation:** Pursuant to Senate Bill (SB) 375 and AB 32, an inventory and analysis of opportunities to encourage the incorporation of energy-saving features, energy-saving materials, and energy-efficient systems and design for residential development.
- Contractor will update financial, physical, and programmatic resources available for affordable housing programs, including local, state funding programs, and private-sector resources.

##### Task 3.4.1 Deliverable:

- Included in the Administrative Draft, Assessment of Housing Needs chapter.

#### Task 3.4.2 Fair Housing Assessment

AB 686 requires each city or county to take actions to overcome patterns of segregation, address disparities in housing needs and access to opportunity, and foster inclusive communities. The City will need to include an assessment of fair housing practices, examine the relationship of available sites to areas of high opportunity, and include actions to affirmatively advance fair housing. The California Tax Credit Allocation Committee/HCD Opportunity Maps will be included and are intended to display the areas, according to research, that offer low-income children and adults the best chance at economic advancement, high educational attainment, and good physical and mental health. The goal of AB 686 is to ensure available sites for low-income housing are in high resource areas rather than concentrated in areas of high segregation and poverty. It will be important to demonstrate adequate sites throughout the county and meaningful actions to overcome geographic disparities. Based on our experience with recent HCD review, we feel we can prepare this analysis for the City to include in their Housing Element.

##### Task 3.4.2 Deliverable:

- Included in the Administrative Draft, Fair Housing Assessment chapter.

### **Task 3.4.3     Housing Constraints**

Contractor will update the analysis of potential and actual governmental and nongovernmental constraints to meeting housing needs, including constraints to maintenance, improvement, and development of housing (pursuant to California Government Code Section 65583(a)(4,5)). Potential constraints to be reviewed include any land use controls, fees and exactions, permit processing procedures, building codes and code enforcement, land and construction costs, and the availability of financing. We will identify potential programs and strategies to reduce or remove identified constraints. This task will include all the analysis needed to comply with recent updates to state housing law.

#### *Task 3.4.3 Deliverable:*

- Included in the Administrative Draft, Constraints chapter.

### **Task 3.4.4     Housing Goals, Policies, Programs, and Quantified Objectives**

Contractor will work with the City to update goals, policies, programs, and quantified objectives (pursuant to Government Code Sections 65583 et seq.) to address identified housing needs and constraints based on the effectiveness and continued appropriateness of existing programs, information received through public outreach, the analysis of constraints, and findings from the needs assessment. Programs will describe specific steps for implementation and will identify a time frame and responsible department. Programs will address:

- All new state requirements since adoption of the existing Housing Element
- Consistency and compliance with the rest of the City General Plan elements and community goals
- Development controls and regulatory incentives
- Housing opportunities for all City residents, including the elderly, those with disabilities, the homeless, and other special-needs groups
- Fair housing programs
- Sources of affordable housing funding
- Preserving and improving existing affordable housing
- Facilitating development of adequate housing and infrastructure to meet the needs of low- and moderate-income households in keeping with the regional fair-share allocation
- Mitigating any governmental constraints to providing and improving housing

#### *Task 3.4.4 Deliverable:*

- Included in the Administrative Draft; Goals, Policies, Programs and Quantified Objectives chapter.

## *Task 3.5 Preparation of Draft Housing Element*

### **Task 3.5.1     Administrative Draft Housing Element**

Contractor will incorporate the feedback received during the community meetings and stakeholder consultations into a comprehensive, formatted Administrative Draft Housing Element. Contractor will submit the Administrative Draft Housing Element to City staff for review as an electronic copy in Microsoft Word. Any outstanding data still needed from the City will be flagged in the Administrative Draft Housing Element so it can be addressed during City staff's review. We request that we receive one consolidated set of City comments on the Administrative Draft.

#### *Task 3.5.1 Deliverable:*

- One electronic copy (in MS Word) of the Administrative Draft Housing Element.

### **Task 3.5.2 Public Review Draft Housing Element**

Contractor will address staff comments on the Administrative Draft and reply to any questions. We will incorporate comments and revisions from staff's review of the Administrative Draft, as directed. Contractor will then prepare and submit a Public Review Draft Housing Element to present to both the Planning Commission at a public hearing.

#### *Task 3.5.2 Deliverables:*

- One electronic copy (in MS Word and PDF and Excel) of the Public Review Draft Housing Element.
- 10 hardcopies and a flash drive with the documents of the Public Review Draft Housing Element to the City.

### **Task 3.5.3 HCD Review of Housing Element**

During the 60-day state review periods, Contractor will serve as the City's liaison to HCD. This service will include:

- Submittal of the draft Housing Element to HCD (60-day review).
- Calls and emails with HCD staff to discuss comments.
- Incorporating HCD's requested revisions.

#### *Task 3.5.3 Deliverables:*

- An electronic and hardcopy submittal to HCD, including cover letter of the Housing Element.
- Emails and memorandums to address HCD questions and comments, as needed.
- Memos with proposed revisions to the Housing Element resulting from HCD comments incorporated into the Housing Element in a tracked-changes format for review and approval by City staff.

### **Task 3.5.4 Adopted Final Housing Element**

Contractor will prepare a final Housing Element that incorporates any changes to the public draft from City staff, HCD, or public comments received. In addition, pursuant to SB 6 (Chapter 667, Statutes of 2019), for a Housing Element adopted on or after January 1, 2021, an electronic copy of the final inventory of the land inventory parcels using HCD-approved Excel spreadsheets must be prepared and submitted to HCD with the Housing Element.

#### *Task 3.5.4 Deliverables:*

- Upon adoption of the Final Housing Element, Contractor 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 General Plan Elements.
- Electronic copies (in MS Word and PDF and Excel) of the Adopted Housing Element and Electronic Sites Inventory to the City and to HCD with a cover letter for their 90-day review. One clean version and one showing all changes made will be included.
- Hard copies (one clean version and one showing all changes made) will be submitted to HCD.
- 10 hardcopies and a flash drive with the documents of the Final Housing Element to the City.

## *Task 3.6 General Plan Amendment*

### **Task 3.6.1 Land Use Element Amendments (if applicable)**

Contractor doesn't anticipate changes being needed to the City's Land Use Element. However, if changes to zoning or land use are necessary to address the City's RHNA, Contractor will prepare a memo listing the recommended changes.

*Task 3.6.1 Deliverables:*

- Prepare memo (Word and PDF format) to City identifying recommended changes to the City's Land Use Element and Land Use Map for consistency with the adopted 2023-2031 Housing Element.

**Task 3.6.2 Safety Element Amendments**

Based on our review of the RFP and review of available City plans and resources, including the General Plan, the Local Hazard Mitigation Plan, and regional resources, Contractor proposes the following scope of work for the Safety Element Update. The associated budget reflects our assumption for level of effort. We are open to adjusting our assumptions, scope, and budget if staff has other preferences for the project.

**Task 3.6.2.a Conduct Climate Change Vulnerability Assessment**

Contractor will prepare a communitywide climate change vulnerability assessment (CCVA or vulnerability assessment) that meets the standards in the California Government Code and clearly identifies climate change stressors, hazards, impacts, and vulnerabilities expected to be present in Stockton. The City's CCVA will look at the threat posed by climate-related hazards in the community, such as drought, flooding, extreme heat, extreme weather, human health hazards, wind, and wildfire, and to what extent the threat from these hazards may change in the future. The CCVA will identify the populations and assets in the community that may be affected by these hazards, including populations (persons likely to be disproportionately harmed), buildings and infrastructure, economic drivers, community services, and ecosystems. We will assess the vulnerability of populations and assets for all relevant climate hazards by looking at impact and adaptive capacity. Contractor will rely on the most accurate and up-to-date science using resources such as Cal-Adapt, the California Fourth Climate Assessment, Delta Adapts and other supporting reports from the Delta Stewardship Council, peer-reviewed scientific studies, publications from academic institutions, and other credible regional, state, and national sources. Assessment of impact and adaptive capacity will be translated into an overall vulnerability score, ranging from low to high. This scoring will help identify the priority populations/assets most susceptible to the effects of natural hazards, which will guide development of the updated Safety Element. Contractor will present the results of this assessment in a summary report. These reports will inform the topics to be addressed in the climate adaptation and resilience goals, policies, and implementation programs of the updated element.

*Deliverables:*

- Memo presenting method and approach to vulnerability assessment and list of climate hazards and populations/assets for inclusion (electronic, Word and PDF)
- Vulnerability assessment scoring matrix with memo summary (draft and final, electronic, Word and PDF)
- Up to three virtual meetings with staff to discuss the hazards, populations, assets, and services, preliminary vulnerability assessment scoring and staff comments, and final scoring and summary (phone/video conference)

**Task 3.6.2.b Review Evacuation Routes**

Recent changes to state law require that Safety Elements updated after January 2022 must identify evacuation routes in the community and their capacity, safety, and viability to allow for effective evacuations under emergency conditions. We expect that planning for effective evacuations will be a key part of this update to the Safety Element, given the land use and circulation patterns and presence of hazard zones in Stockton. Contractor will ensure that the updated Safety Element address these and other state requirements. Contractor will rely on the City and County's evacuation route mapping as a starting point. This sub-task is expected to include the following steps, with the work bound by the level of effort estimated in the budget.

- Identify and map existing evacuation routes.
- Identify evacuation scenarios and define hazard zones. The budget assumes evaluation of two to three hazard or disaster scenarios. Contractor assumes at least one scenario would focus on a flood event.
- Review capacity of designated routes in the hazard zones, assuming this information (level of service and/or capacity data) is available from the recent General Plan and environmental impact report (EIR) or other similar

efforts led by the City or a regional agency. This task does not include preparation of a level of service study for the City's roadway network.

- Assess risks and vulnerabilities for the hazard zones and evacuation routes, which includes a review of the location of the City's mapped routes against the available hazard maps, demographics of affected areas, and results of the vulnerability assessment.
- Identify goals, policies, and implementation programs to reduce risk and vulnerability.

*Deliverables:*

- Memo confirming evacuation routes, evacuation scenarios, and hazard zones.
- Tables of evacuation route capacities and identification of pinch points based on data availability for each zone.
- Maps of evacuation routes, hazard zones, and vulnerable populations in each zone.
- Recommendations for evacuating vulnerable populations within hazard zones.

### **Task 3.6.2.c Prepare Safety Element**

Contractor will initiate the project with a kick-off meeting to introduce the project team and allow for a review of project goals, communication protocols, project schedule, work plan, data needs, status of current and planned efforts that are relevant to the project, and the proposed approach to staff and community engagement. This meeting will also establish the project management procedures, including invoicing terms and communication protocols, and data collection approach. This meeting can occur with the kick-off of the Housing Element or as a stand-alone meeting.

Following identification of data needs and data collection, Contractor will conduct a crosswalk review of the City's Safety Element and related documents to assess applicability with Section 65302(g) of the California Government Code and assess the applicability and relevance of each Safety Element's existing goals, policies, and actions. As part of the crosswalk review, Contractor will also review the City's Local Hazard Mitigation Plan (LHMP), and supporting regional documents and applicable local studies, to identify analyses, maps, policies, actions, or other content that could support compliance with existing guidance and regulations. We understand the City's Office of Emergency Services is currently updating the City's LHMP and that the County is initiating an update to its LHMP later this year. Contractor will review the LHMP as part of our crosswalk review and integrate applicable information. We will present the results of our crosswalk review in a spreadsheet that lists which revisions are needed to the Safety Element and why, what existing documents or other work can be leveraged to support these revisions, and any additional resources that may be needed. We will recommend integration of existing technical studies and analyses, policies, or other content, as well as updates of existing information and preparation of new content.

In addition, we will review the existing Safety Element's goals, policies, and implementation actions and provide recommendations. For goals, policies, and actions that could be retained, we will note if they can be kept as written or revised to support consistency with state requirements or current conditions. This review involves consultation with City staff to learn more about implementation and effectiveness of the Safety Element. We will present the results of this review in a matrix or table format in a Word document.

Following completion of the vulnerability assessment, evacuation analysis, and crosswalk review, Contractor will prepare a Safety Element that complies with applicable state laws, including the guidance issued by the Governor's Office of Planning and Research (OPR) and California Governor's Office of Emergency Services (Cal OES). We anticipate a focused update to the City's Safety Element. We expect new climate change-related goals, policies, and actions to address risk and vulnerabilities of climate-related hazards, such as drought, extreme heat, severe weather, and others as identified in the vulnerability assessment. In addition, there will likely be new goals, policies, and actions to address any issues raised through the evacuation route analysis. We anticipate minor updates to goals, policies, and implementation actions to address other natural and human-made hazards, including flooding, seismic activity, landslides, hazardous materials, wildfire and smoke impacts, emergency preparedness, and response.

We will update background information, hazard-specific information and details, including mapping as applicable, and goals, policies, and actions to reduce exposure, risk, and vulnerability and promote community resilience. We will prepare policies that are responsive to these issues and meet the requirements of the California Government Code, including improving safety and resiliency for people, public and private property, and infrastructure systems, as well as the natural environment. As part of the Safety Element Update, we will prepare updated mapping for the community. These maps will identify areas at increased risk of natural hazards, locations of potentially vulnerable populations and assets, access in constrained neighborhoods, and evacuation routes.

To the extent necessary and appropriate, we will coordinate with Cal OES, OPR's Integrated Climate Adaptation and Resiliency Program, the Department of Conservation's California Geological Survey, Central Valley Flood Protection Board, and the Delta Stewardship Council. We recommend review by state agencies 90 days in advance of review and consideration for adoption by the City Council.

Contractor will prepare three drafts (administrative, public review, and public hearing drafts) and one final Safety Element. After receiving one set of consolidated staff comments on the Administrative Draft Safety Element, the Contractor will prepare a Public Review Draft Safety Element for distribution and review by community and agency stakeholders. Following receipt of comments from the public and state agencies and direction from City staff on changes, Contractor will prepare the Public Hearing Draft Safety Element for review and recommendation by the Planning Commission and consideration of adoption by the City Council. Following review by the Planning Commission and City Council and direction from staff on changes, Contractor will prepare the Final Safety Element, inclusive of maps and supporting analyses.

The Safety Element team will participate in one community meeting, two public hearings, a kick-off meeting, and regular project coordination meetings. Our scope and budget assumes the Safety Element will be combined with the Housing Element for final review by Planning Commission and City Council.

*Deliverables:*

- Kick-off meeting attendance
- Kick-off meeting agenda (electronic, Word)
- Kick-off meeting summary (electronic, Word)
- Data needs list (electronic, Word)
- Memo summarizing crosswalk of existing plan review and spreadsheet of results (electronic, Word and PDF)
- Matrix presenting review of existing Safety Element goals, policies, and actions (electronic, Word and PDF)
- Meeting(s) with staff to review results (phone/video conference)
- Administrative Draft Safety Element – background content, goals, policies, actions, and maps (electronic, Word and PDF)
- Public Review Draft Safety Element (electronic, Word and PDF)
- Track changes edits to Public Review Draft (electronic, Word and PDF)
- Public Hearing Draft Safety Element (electronic, Word and PDF)
- Final Safety Element (electronic, Word and PDF)
- Consultations with applicable state and regional agencies (phone/video conference)
- Meetings with staff (phone/video conference)

## TASK 4 ENVIRONMENTAL REVIEW FOR BOTH EFFORTS

### Task 4.1 *General Plan EIR Addendum*

The focus of the project will be to update the Housing Element to meet the City's RHNA and ensure compliance with new regulations. The use of an Addendum builds on the investment made in the City's adopted General Plan, and significantly shortens the time period for consideration of the new Housing Element. Finally, provided that the City's decision to use an Addendum is supported with substantial evidence in the record, the City's decision enjoys the same substantial evidence level of challenge as the General Plan EIR.



Contractor will provide an Administrative Draft Addendum following a format discussed during the kickoff meeting. Our default format for an Addendum is short and follows the findings in CEQA Guidelines Section 15162 rather than using an initial study. If a formal initial study is requested, we will need to increase the budget and scope accordingly. We will use a copy of the certified General Plan EIR and findings of fact to inform the analysis portion of the Addendum. We will also include any local standards and ordinances that address physical changes to the environment. All significant impacts identified in the General Plan EIR will be reviewed in the context of the proposed changes. One administrative draft of the Addendum will be provided for review. The final draft of the Addendum will be used to support the CEQA determination during the hearing(s) for the Housing Element. Contractor's environmental staff will attend a Zoom meeting to answer questions regarding the Addendum. This scope does not include physical attendance at a meeting; however, we would be happy to amend the scope/budget to attend meetings in person.

*Task 4.1 Deliverables:*

- Administrative Draft Addendum, Final Addendum, Assistance with Resolution and Staff Report Language.

## *Task 4.2 Tribal Consultation*

Contractor will assist the City by completing the Native American Heritage Commission (NAHC) online form requesting a tribal contact list. Using the addresses on the list from NAHC, Contractor will draft letters (for distribution on City letterhead) to each of the tribes on the NAHC list inquiring whether they want consultation. Because an Addendum is not a publicly circulated document, compliance with AB 52 would not be required. However, if there is uncertainty regarding whether an Addendum will be the appropriate environmental document and a Mitigated Negative Declaration (MND) or subsequent EIR (SEIR) may be required, it may be prudent to notify tribes pursuant to AB 52.

Contractor can facilitate and attend the consultation(s) with any tribes requesting consultation; however, the City must be represented. Pursuant to SB 18, tribes identified by NAHC will receive a written letter notifying them of the proposed project and asking if they wish to consult; tribes who notified the City under AB 52 will also be notified of the project and asked if they desire to consult in accordance with AB 52 and Sections 21080.3.1 and 21080.3.2 of CEQA. Following the consultation meeting (or conference call), Contractor will provide the written outcome of the process and a record for the environmental documentation showing that AB 52 consultation has been completed. Completion of the AB 52 process is needed prior to circulation of the environmental document for public review. Completion of the SB 18 process is needed prior to acting on the project.

*Task 4.2 Deliverables:*

- Draft letter to NAHC; Draft letters to identified tribes; Facilitation, attendance, and documentation of requested consultations; and written results of consultation, including closure of AB 52 consultation.

## *Task 4.3 SB 18 and AB 52 Consultation*

If an Addendum is prepared for the proposed project, only SB 18 compliance is required. If an SEIR is prepared, compliance with both SB 18 and AB 52 will be required.

Contractor will complete the NAHC online form requesting a tribal contact list. Using the addresses on the list from NAHC, Contractor will draft letters (on City letterhead) to each of the tribes inquiring whether they want consultation. In addition to the NAHC list, letters will also be prepared for any tribes who have requested consultation pursuant to AB 52. As consultation for AB 52 and Section 21080.3.1 of CEQA is a government-to-government process, it must be initiated by the local government agency, and cities are usually represented at the consultation(s). Contractor can facilitate and attend the consultation(s); however, the City must be represented. Pursuant to SB 18, tribes identified by NAHC will receive a written letter notifying them of the proposed project and asking if they wish to consult; tribes who notified the City under AB 52 will also be notified of the project and asked if they desire to consult in accordance with AB 52 and Sections 21080.3.1 and 21080.3.2 of CEQA. Following

the consultation meeting (or conference call), Contractor will provide the written outcome of the process and a record for the environmental documentation showing that AB 52 consultation has been completed. Completion of the AB 52 process is needed prior to circulation of the environmental document for public review. Completion of the SB 18 process is needed prior to acting on the project.

*Task 4.3 Deliverables:*

- Draft letter to NAHC; draft letters to identified tribes; facilitation, attendance, and documentation of requested consultations; and written results of consultation, including closure of AB 52 consultation.

## TASK 5 HOUSING ELEMENT OUTREACH AND MEETINGS

### *Task 5.1 Stakeholder Consultation*

Contractor recommends conducting virtual/phone stakeholder consultations with organizations representing different socio-economic members of the community to identify housing needs. We have found these consultations to be a valuable way of getting targeted input. We will work with City staff to develop a list of 10 to 12 organizations, and we will conduct a phone or email survey to discuss the issues and housing-related needs of their clients.

*Task 5.1 Deliverable:*

- Summary of six to eight completed consultations to be included in the Housing Element.

### *Task 5.2 Community Meetings*

Contractor will work with City staff to develop and implement an approach to engaging with the community that will build on the targeted engagement that has already occurred as part of Task 1, Land Inventory, and during the stakeholder consultations in Task 5.1. We envision the community meetings occurring early in the process to introduce the Housing Element Update to the community and to gather input on housing issues and potential policy solutions. We propose two workshops covering the same content occurring during the same week if possible – one virtual and one in-person.

Traditional in-person meetings have been restricted due to COVID-19. Although restrictions have begun to lift, we learned over the course of the last year and a half that virtual engagement can often result in greater participation and the ability to reach people who cannot attend in-person meetings. Contractor proposes to host one virtual workshop and one in-person workshop and prepare materials, including the PowerPoint presentation. This presentation will be designed to inform and ask questions for residents and stakeholders to respond. In addition, during the virtual workshop we will use polling tools and other electronic methods of gauging public opinion.

*Task 5.2 Deliverables:*

- Attendance at one virtual workshop and one in-person workshop. Contractor is happy to have a Spanish-speaking staff person attend the workshops to translate if desired by the City.
- Promotional flyer and announcements (in English and Spanish)
- PowerPoint presentation (PowerPoint can be translated into Spanish for posting on the City's website if desired by the City)
- Live polling exercises during the virtual workshop
- Summary notes incorporated into the Housing Element

### *Task 5.3 Planning Commission and City Council Hearings*

We propose three public hearings. One hearing each with the Planning Commission to present the Draft Housing Element prior to submitting it to HCD, then one public hearing with the Planning Commission to recommend adoption, and one public hearing with the City Council for adoption of the Housing Element.

#### *Task 5.3 Deliverables:*

- Provide information for staff reports, draft and final PowerPoint presentations for each meeting, assuming in-person attendance at three public hearings.

## **OPTIONAL TASKS**

### *Optional Task 1 Fatal Flaw and Infrastructure Analysis for “Priority Areas” (used for future funding discussions)*

Contractor will prepare the following analysis for up to 8 individual Housing Priority Sites. The intent of these tasks is to provide the City with a fatal flaw analysis to determine if conditions on the site could hinder future development potential.

- Conduct a Phase 0 screening assessment, which includes review of databases, aerials, topographic maps, and Sanborn map. A Phase 0 could identify potential sites of concern that may need a full Phase I or to go straight to a Phase II, if the land use history identifies a former gas station, factory, dry cleaners, etc.
- Conduct a Phase I ESA in accordance with the American Society for Testing and Materials (ASTM) Standards on Environmental Site Assessments, ASTM E 1527-13 (ASTM 1527-13) and in accordance with the USEPA Standards and Practices for All Appropriate Inquiries (40 CFR 312), published November 2005. The goal of an ASTM Phase I is to evaluate site history, existing observable conditions, current site use, and current and former uses of surrounding properties to identify the potential presence of “Recognized Environmental Conditions (RECs)” associated with the site.
- Conduct desktop analysis including working with City departments for infrastructure, cultural resources, biological resources, and qualitative noise review

### *Optional Task 2 Additional Community Engagement*

The engagement process for the HAP could be expanded to include more public involvement. Contractor anticipates conducting 3 additional workshops in the 3 neighborhoods and up to 3 meetings on up to 10 priority sites. Meetings for priority sites will be grouped by neighborhood to include multiple sites with similar stakeholders, ownership, and issues at one meeting.

### *Optional Task 3 Case Studies and Best Practices Research*

The contractor will prepare white papers and analysis as requested by the City. It is anticipated one white paper will address the subject of the State Pro-Housing Designation and another on potential funding/financing tools. One additional white paper can be prepared as requested by the City.

The PlaceWorks Team  
City of Stockton Housing Element and Housing Action Plan  
COST PROPOSAL

Hourly Rate:		PLACEWORKS																	SUBCONSULTANTS			10% Subconsultant Markup Subconsultant Total Total Task Budget			
		Jennifer Gastelum	Amy Sinsheimer	Charlie Knox			Karla Martinez	Tammy Seale	Eli Krispi	Mark Teague	Patrick Hindmarsh	Denise Clendening	Miles Barker	Rob Mazur	Giselle Vandrick	GRAPHICS	TECH. EDITOR	WP/ CLERICAL							
		Principal in Charge \$225	Project Manager \$180	Senior Advisor \$240	Senior Associate \$165	Project Planner \$125	Project Planner, Outreach \$115	Principal, Sr. Advisor, SE \$230	Project Manager, SE \$175	Principal, CEQA \$230	Senior Associate, CEQA \$210	Associate Principal \$195	Associate, CEQA \$195	Project Planner, CEQA \$115	Senior Associate, GIS \$180				Project Planner, GIS Support \$115						
		PlaceWorks Hours	PlaceWorks Office Expenses	PlaceWorks 2% Total																					
TASK 0. Project Kick-off Meeting and Project Management																									
0.1	Project Kickoff	2	8	2	2	10		2	8	1	2		12					2	51	\$161	\$8,231	0	\$0	\$0	\$8,231
0.2	Project Management and Coordination	4	12		8	12	4	4	18		8		18	4					92	\$298	\$15,178	0	\$0	\$0	\$15,178
Task 0. Subtotal		6	20	2	10	22	4	6	26	1	10	0	30	4	0	0	0	2	143	\$459	\$23,409	0	\$0	\$0	\$23,409
TASK 1. Land Inventory																									
1.1	Draft RHNA Land Inventory	2	16		24									6	16				64	\$204	\$10,414	0	\$0	\$0	\$10,414
1.2	Stakeholder Outreach	2	12		12	8	4							2	4			2	46	\$142	\$7,242	0	\$0	\$0	\$7,242
1.3	Final RHNA Land Inventory	2	6		8	2	2							4	4				28	\$90	\$4,600	0	\$0	\$0	\$4,600
1.4	Housing Priority Site Analysis	1	8	2	4						2			4	4				25	\$88	\$4,493	0	\$0	\$0	\$4,493
1.5	Identify Partnerships		4	4	4														12	\$47	\$2,387	0	\$0	\$0	\$2,387
1.6	Final Housing Priority Sites		2	2										2	4				10	\$33	\$1,693	0	\$0	\$0	\$1,693
Task 1. Subtotal		7	48	8	52	10	6	0	0	0	2	0	0	18	32	0	0	2	185	\$604	\$30,829	0	\$0	\$0	\$30,829
TASK 2. Housing Action Plan																									
2.1	Existing Inventory & Assessment																		0	\$0	\$0	0	\$0	\$0	\$0
2.1.1	Review Plans, Reports, Studies, other Relevant Doc																		0	\$0	\$0	3,500	\$350	\$3,850	\$3,850
2.1.2	Review Gaps in Policy Recommendations																		0	\$0	\$0	1,500	\$150	\$1,650	\$1,650
2.1.3	Equity and Anti-Displacement																		0	\$0	\$0	10,000	\$1,000	\$11,000	\$11,000
2.1.4	Prepare Overview of Existing Plans																		0	\$0	\$0	5,000	\$500	\$5,500	\$5,500
2.1.5	Review and Prepare Overview of Barriers																		0	\$0	\$0	9,000	\$900	\$9,900	\$9,900
2.1.6	Inventory of Specialty Tools/Incentives																		0	\$0	\$0	6,000	\$600	\$6,600	\$6,600
2.1.7	Review and Prepare Overview of Existing Incent																		0	\$0	\$0	4,000	\$400	\$4,400	\$4,400
2.1.8	Conduct Interviews																		0	\$0	\$0	8,250	\$825	\$9,075	\$9,075
2.2	Draft Housing Action Plan																		0	\$0	\$0	0	\$0	\$0	\$0
2.2.1	Review and Provide Existing Content																		0	\$0	\$0	14,000	\$1,400	\$15,400	\$15,400
2.2.2	Include Various Types/Tiers of Housing																		0	\$0	\$0	4,500	\$450	\$4,950	\$4,950
2.2.3	Homelessness Resource Inventory																		0	\$0	\$0	7,500	\$750	\$8,250	\$8,250
2.2.4	Case Studies, Pro Formas, & Preplanning																		0	\$0	\$0	82,000	\$8,200	\$90,200	\$90,200
2.2.5	Define Housing "Priority Areas"																		0	\$0	\$0	8,000	\$800	\$8,800	\$8,800
2.3	Final Housing Action Plan																		0	\$0	\$0	0	\$0	\$0	\$0
2.3.1	Refinement of Draft Housing Action Plan																		0	\$0	\$0	4,000	\$400	\$4,400	\$4,400
2.3.2	Create Action Steps/Implementation Matrix																		0	\$0	\$0	5,000	\$500	\$5,500	\$5,500
2.3.3	Recommend Financing Mechanisms																		0	\$0	\$0	6,000	\$600	\$6,600	\$6,600
Task 2. Subtotal		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$0	\$0	178,250	\$17,825	\$196,075	\$196,075
TASK 3. 2023 - 2031 Housing and Safety Element Update																									
3.1	Project Schedule Development		2			2													4	\$12	\$622	0	\$0	\$0	\$622
3.2	Existing Conditions and Needs																		0	\$0	\$0	0	\$0	\$0	\$0
3.2.1	Document Review		1			4	4												9	\$23	\$1,163	0	\$0	\$0	\$1,163
3.2.2	Review of Previous Housing Element		2		8	16												4	30	\$83	\$4,223	0	\$0	\$0	\$4,223
3.3	RHNA Assessment	4	8	2		24								8	16				62	\$182	\$9,282	0	\$0	\$0	\$9,282
3.4	Assessment of Housing Needs																		0	\$0	\$0	0	\$0	\$0	\$0
3.4.1	Assessment of Housing Needs Document		4		8	16	26												54	\$141	\$7,171	0	\$0	\$0	\$7,171
3.4.2	Assessment of Fair Housing		2		4	26	8							4	6				50	\$132	\$6,732	0	\$0	\$0	\$6,732
3.4.3	Housing Constraints		4		8	16	26												54	\$141	\$7,171	0	\$0	\$0	\$7,171
3.4.4	Housing Goals, Policies, Programs and Quant Obj	2	12		20														34	\$118	\$6,028	0	\$0	\$0	\$6,028
3.5	Preparation of Draft Housing Element																		0	\$0	\$0	0	\$0	\$0	\$0
3.5.1	Administrative Draft	4	8	2	24	16										4	16	12	86	\$249	\$12,709	0	\$0	\$0	\$12,709
3.5.2	Public Review Draft		8		16	16											8	6	54	\$154	\$7,844	0	\$0	\$0	\$7,844
3.5.3	HCD Review	2	12		20	20	8									4	2		68	\$200	\$10,220	0	\$0	\$0	\$10,220
3.5.4	Adopted Final Housing Element		6		12	10											2	4	34	\$100	\$5,100	0	\$0	\$0	\$5,100
3.6	General Plan Amendment																		0	\$0	\$0	0	\$0	\$0	\$0
3.6.1	Land Use Element Amendments Memo		2		4	6											4	6	22	\$58	\$2,978	0	\$0	\$0	\$2,978
3.6.2	Safety Element Amendments																		0	\$0	\$0	0	\$0	\$0	\$0
3.6.2.a	Vulnerability Assessment							4	12				80		8		8	8	120	\$300	\$15,280	0	\$0	\$0	\$15,280
3.6.2.b	Safety Element Map Updates & Evacuation Analysis							4	12					16	80	2			114	\$307	\$15,637	0	\$0	\$0	\$15,637
3.6.2																									

COST PROPOSAL

Hourly Rate:		PLACEWORKS																		SUBCONSULTANTS		10% Subconsultant Markup			Subconsultant Total		Total Task Budget																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
		Jennifer Gastelum		Amy Sinsheimer		Charlie Knox		Karla Martinez		Tammy Seale		Eli Krispi		Mark Teague		Patrick Hindmarsh				Denise Clendening									Miles Barker		Rob Mazur		Giselle Vandrick																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
		Principal in Charge	Charge \$225	Project Manager	Manager \$180	Senior Advisor	Advisor \$240	Senior Associate	Associate \$165	Project Planner	Planner \$125	Project Planner, Outreach	Planner \$115	Principal, Sr. Advisor, SE	Sr. Advisor \$230	Project Manager, SE	Manager \$175	Principal, CEQA	Principal \$230	Senior Associate, CEQA	Associate \$210								Associate Principal	Principal \$195	Project Planner, CEQA	Planner \$115	Senior Associate, GIS	Associate \$180	Project Planner, GIS Support	Planner \$115	GRAPHICS	\$115	TECH. EDITOR	\$115	WP/ CLERICAL	\$115																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
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