

The logo consists of the letters "LWC" in white, sans-serif font, centered within a solid orange square.

LWC

CITY OF COACHELLA, CA

HOUSING ELEMENT UPDATE

**RESPONSE TO REQUEST FOR PROPOSAL (RFP) FOR 6TH CYCLE
HOUSING ELEMENT UPDATE**

SEPTEMBER 25, 2020

Prepared for:



City of Coachella
53-990 Enterprise Way
Coachella, CA 92236

Prepared by:



Lisa Wise Consulting, Inc.
706 South Hill Street, Suite 1100
Los Angeles, CA 90014
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A. Statement of Qualifications

Cover Letter

September 25, 2020

LWC

Juan Carrillo
City of Coachella
Development Services Department
53-990 Enterprise Way
Coachella, CA 92236
jcarrillo@Coachella.org

RE: Lisa Wise Consulting, Inc. (LWC) Proposal in response to City of Coachella Request for Proposals for 6th Cycle Housing Element Update

Dear Juan Carrillo,

LWC is very pleased to submit our proposal to update the City of Coachella's 6th Cycle Housing Element. Our firm is dedicated to understanding and applying California housing legislation and developing strategies that are sensitive to the unique opportunities and pressures of each community. We also bring an expertise in land development code and zoning ordinances, a critical part of the housing puzzle.

LWC's resume features over 20 Department of Housing and Community Development (HCD)-certified and adopted Housing Element Updates in the 4th and 5th Cycles. We are also leading 6th Cycle updates in Long Beach, Santa Maria, and Woodland. We will leverage this experience to deliver a smooth and efficient adoption, resolution, and HCD certification in Coachella. Our strong working knowledge also enables us to address difficult technical issues in Coachella, such as identifying appropriate infill sites for affordable units.

Our proposal includes all the tasks and outcomes prescribed by the HCD in this 6th cycle, to take the project from initiation to certification, including evaluation of 5th cycle policies and programs, sites and constraints analyses, responsive coordination with the HCD, community engagement, and adoption hearing support. We will also work closely with MSA Consulting, to understand the rezoning efforts needed to accommodate the remaining 5th Cycle RHNA.

We understand the City's intent for this project is to comply with State housing law, facilitate the acceleration of appropriately scaled and priced housing production, and preserve housing units across all income levels. LWC's knowledge and hands-on experience with California housing law also includes evaluating and developing fair housing ordinances, inclusionary housing programs, density bonus programs, financial feasibility testing of building types, and strategies for Accessory Dwelling Units (ADUs). We will work closely with City staff and the community to address the demand for housing with policies aimed at accommodating a diversity of housing that complements the city's evolution.

HOUSING SUPPLY AND DEMAND IN COACHELLA

THE CALIFORNIA DESERT
ASSOCIATION OF REALTORS
CITES CONTINUING HIGH
DEMAND AND PRICING FOR
HOUSING IN COACHELLA AS
MORE PEOPLE CHOOSE TO
RELOCATE TO THE DESERT

As LWC's President and CEO, I will be ultimately responsible for the quality and timeliness of all deliverables and our adherence to the budget and contract. I will work closely with David Bergman, who as Project Director brings over 25 years of experience in California housing and project management. David and I will support Kathryn Slama, our most experienced Senior Associate. Kathryn will serve as Project Manager, responsible for the day-to-day operations, work production and workflow, and communication with the City. Kathryn has dedicated her career to housing and zoning codes and led over a dozen Housing Element Updates. The LWC team also includes Karen Huynh, who has 10 years of public policy, social equity, and affordable housing experience.

We appreciate the opportunity to submit a proposal to work with City of Coachella to produce a comprehensive and compliant 6th Cycle Housing Element Update, which will garner support from the community, adoption from the City Council, and HCD certification. We look forward discussing the proposal with you and will be happy to make refinements at the City's discretion.

Sincerely,



Lisa Wise, AICP, CPA (inactive)
President, CEO
Lisa Wise Consulting, Inc.
lisa@lisawiseconsulting.com
805.595.1345

Project Understanding and Approach

PROJECT UNDERSTANDING

The City of Coachella (City) is a diverse and growing city nestled in easternmost Coachella Valley. The City is poised for continued growth while aiming to balance the need for high-quality jobs and a sufficient housing inventory.

Based on Southern California Council of Government (SCAG) estimates in the recent housing element update cycle, the City is required to accommodate 7,876 housing units, including over 2,000 very low- and low-income units. We understand the City is currently updating its zoning code to achieve 5th Cycle goals, but will still likely need to develop a separate sites inventory to meet its Regional Housing Needs Allocation (RHNA) for the 6th Cycle.

While cities cooperate to reach regional and State goals, they also compete for funding, residents, employers, and consumer spending. Cities also face pressures outside of their control: political, economic, social, and environmental. A comprehensive and actionable Housing Element Update that meets the City's RHNA goals will better position Coachella for funding and grant programs and to take advantage of opportunities in an uncertain future. The upcoming update will demonstrate accommodation of the new RHNA, promote and incentivize the adequate development of fair and equitable housing, and ensure consistency with the City's General Plan, zoning code, and other regulations.

PROJECT APPROACH

LWC's approach assimilates over 10 years of Housing Element Update experience in the 4th and 5th Cycles and three housing element updates in this 6th Cycle. We are prepared for the heightened demands, including higher RHNA's and new housing legislation, such as:

- Housing Crisis Act (SB330)
- Affirmatively Furthering Fair Housing (AB686)
- No Net Loss (SB 166)
- Adequate Housing Element Sites (AB 1397)

LWC's project management approach ensures our capacity to consistently deliver engagements on time and within budget. Our approach relies on close and regular communication with our client, regular internal performance audits, and systematic and hierarchical review of all work products. We also employ BigTime, an online time management platform that enables us to track project performance.

This approach will ensure a certifiable Housing Element that meets State and regional obligations while strengthening the City's position in the region and securing the community's vision for the future.

JOBS/HOUSING BALANCE REFERS TO THE "SPATIAL MISMATCH" BETWEEN A WORKER'S RESIDENCE AND WORKPLACE. WHEN JOBS ARE NOT IN BALANCE WITH THE LOCAL LABOR FORCE, THE RESULTS ARE INCREASING LEVELS OF LONG COMMUTES, HEAVY ROAD (AND TRANSIT) CONGESTION, AND INCREASED ISSUES RELATED TO HOUSING AFFORDABILITY.

THE AMERICAN COMMUNITY SURVEY



Project Team

LWC

FIRM PROFILE - LISA WISE CONSULTING, INC.

LWC is an urban planning and economics firm that specializes in promoting strong pedestrian and transit-oriented neighborhoods and 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, land use economics, zoning code updates, 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
- Zoning Ordinances, Development Codes, and Form-Based Codes
- Specific Plans, Master Plans, and Community Plans
- Market Analyses, Revitalization Strategies, and Financial Feasibility Studies
- Public Engagement, Visioning, and Community Consensus Modeling

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

ORGANIZATION CHART



Lisa Wise, AICP
President, CEO
Principal-In-Charge
Project Commitment: 27 hrs



David Bergman, AICP
Director
Project Commitment: 77 hrs



Kathryn Slama
Project Manager
Project Commitment: 167 hrs



Karen Huynh
Associate
Project Commitment: 300 hrs

Key Staff Descriptions

LISA WISE CONSULTING, INC.



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 Masters of City and Regional Planning degree from California Polytechnic State University, San Luis Obispo, a Masters in Accountancy from DePaul University in Chicago and a Bachelor of Science degree 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 (Director) and Kathryn Slama (Project Manager) to guide LWC's approach and review and approval of final deliverables.

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 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, contribute to technical analysis, review draft documents, and track project milestones and performance. David will develop the framework and method for research and reporting, sequencing of tasks, and outreach strategies.

KATHRYN SLAMA | SENIOR ASSOCIATE

Kathryn has over seven years of hands-on housing, zoning code, station area planning, and project management experience, and leads the team on housing policy, regulatory analysis, implementation strategies, and streamlined and compliant zoning codes. Kathryn has successfully led Housing Element Updates in Richmond, Livermore, Benicia, Arroyo Grande, Atascadero, Tehachapi, and Loomis. Kathryn also brings strong writing, public speaking and community engagement skills and has facilitated dozens of public workshops, steering committee meetings and hearings. She holds a Masters 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, and draft, review and edit the housing element. She will coordinate review and certification by the submittal to HCD. Kathryn will be responsible for ensuring deliverables are complete, accurate, and submitted on time and within budget to meet and exceed client expectations. She will 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. She works closely with each client to deliver tailored research and recommendations aimed at creating more livable, accessible, equitable, and resilient places. 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 source, review and summarize archival documents, conduct socio-economic research and policy assessment, evaluate existing programs, prepare materials for outreach events, and develop draft reports, memos, and informative and attractive graphics. Karen will also be responsible for project file management, report production and archiving.

Scope of Services

Task 1: Assessment

Task 1.A Evaluation of 2021 Housing Element

LWC will review the City's current Housing Element and its programs, as well as Annual Housing Element Progress Reports. This review will include:

- An assessment of the City's progress in meeting its existing Housing Element and RHNA goals
- A summary of the effectiveness of the programs and policies
- A comparison between projected goals with actual accomplishments
- A summary of how these results are important to the revision of the Housing Element
- An evaluation of the compliance of the existing Housing Element with current State housing law and applicable statutes

Task 1.B Type of Housing Allocation (RHNA Target Review)

Working with data generated from SCAG, LWC will prepare a summary memorandum for the City to provide to elected and appointed officials describing the SCAG RHNA methodology and providing information regarding Coachella's allocation.

Task 1.C Analysis of Designated Disadvantaged Communities

In accordance to SB 244, LWC will identify relevant Disadvantaged Unincorporated Communities (DUCs) within or contiguous to the City's sphere of influence and determine how Coachella is planning for infrastructure or public service needs deficiencies of the identified DUCs. Any deficiencies constraining housing production will be identified.

Task 1.D Document Review

LWC will review relevant documents to gain insight and understanding of local conditions and the City's housing progress and priorities. These documents include but are not limited to the 2013 Housing Element Update, 2013 Housing Conditions and Vacant Land Survey, HCD communications, General Plan, Zoning and Subdivision Ordinances, and all housing programs/policies.

Deliverables

- *Evaluation of 2021 Housing Element, to be incorporated into the draft Housing Element*
- *RHNA Review Memo (PDF, Word)*
- *Designated Disadvantaged Communities Analysis*

Task 2: Housing Element Preparation

Task 2.A Housing Needs Assessment

In accordance with Government Code 65583(a), LWC will utilize available U.S. Census data, CA Department of Finance, and City data to analyze and update key population, housing, and employment characteristics to identify the City's specific housing needs and evaluate its housing conditions using State-approved criteria. LWC will establish the nature and extent of housing needs for Coachella including existing and projected housing needs and the housing needs of special groups. This will include an identification of the City's share of RHNA targets by housing type.

Key data characteristics include:

- Demographics (e.g. age, race/ethnicity, employment projections)
- Household type/size, age and income (by race and ethnicity)
- Housing stock characteristics (e.g. type, vacancy, age/condition, and cost/affordability)
- Assessment of overcrowding and cost burden
- Special Needs (e.g. large households, persons with disabilities)

Task 2.B Housing Needs Assessment

In accordance with Government Code 65583.2, LWC will prepare an inventory of land suitable for residential development within the planning period, including vacant sites and sites having the potential for redevelopment. LWC will leverage previous work prepared by the City, such as the vacant land inventory sites from the existing Housing Element. LWC will work closely with staff to develop a parcel-level inventory of sites with near-term residential development potential at appropriate densities. The assessment will also include an analysis of the availability of infrastructure for sites included in the inventory. This task assumes the City has adequate parcel-level GIS data (including APN, existing use, zoning, lot size, and assessor's data) available.

Task 2.C Sites Inventory

In accordance with Government Code 65583(a), LWC will conduct a constraints analysis. This analysis will differentiate between governmental constraints (such as land use, zoning, height, setbacks, and impact fees), non-governmental constraints (such as mortgage lending availability), and environmental constraints to inform decision makers on the most effective and appropriate policies to reduce constraints and facilitate housing production.

Task 2.D Housing Constraints Assessment

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

Task 2.E Housing Resources Assessment

In accordance with Government Code 65583(b) and (c), LWC will build on the existing Housing Element, public consensus, and the technical analyses performed in Tasks 2.A. to 2.D. to produce an implementation plan that outlines policies and programs that will satisfy the housing goals of the City during the planning period. This plan provides appropriate and feasible steps the City is already taking or will undertake to accommodate its housing need.

Deliverables (to be incorporated into the draft Housing Element in Task 3.A):

- *Housing Needs Assessment*
- *Housing Resource Assessment*
- *Inventory of Suitable Residential Sites*
- *Implementation Plan (Housing Goals and Policies)*
- *Housing Constraints Assessment*

Task 3: Prepare and Finalize Housing Element

Task 3.A Administrative Draft Housing Element

LWC will prepare an Administrative Draft Housing Element in compliance with all applicable State and federal laws, including all supporting documents, by June 2021. LWC assumes City staff will submit a single set of non-conflicting comments for incorporation into the Public Review Draft Housing Element.

Task 3.B Public Review Draft Housing Element

LWC will revise the Administrative Draft Housing Element to incorporate comments from City staff and prepare a Public Review Draft for City staff distribution to HCD, the City Council, the Planning Commission, and the general public by October 2021. LWC assumes City staff will submit a single set of non-conflicting comments for incorporation into the Final Housing Element.

Task 3.C Prepare Final Documents

LWC will revise the Public Review Draft in response to feedback from HCD, the City Council, the Planning Commission, City staff, and the general public and will prepare a Final Housing Element to present to the Planning Commission and City Council for adoption by January 2022. LWC will make any revisions following adoption and submit the Housing Element to HCD for certification.

Task 3.D Coordination with HCD

LWC will assist the City in achieving State certification of the Housing Element after adoption by City Council. LWC will work closely with HCD and the City to ensure that the City meets State requirements and will recommend modifications to the adopted Housing Element, if required, to obtain certification. LWC will communicate with HCD throughout the project and during the review and approval period, ensuring thorough review and appropriate response to comments.

Deliverables:

- *Administrative Draft (One (1) reproducible copy, PDF, Word)*
- *Public Review Draft (One (1) reproducible copy, PDF, Word)*
- *Final Draft Housing Element (Thirty (30) reproducible copies, PDF, Word)*
- *Final Certified Housing Element (PDF, Word)*
- *Coordination and communication with HCD, including review meetings*

Task 4: Project Management and Coordination

Task 4.A Kick-Off Meeting

LWC will prepare for and attend one kick-off meeting with City staff. The meeting will be online via video or teleconference. Meeting objectives include establishing project goals and objectives, clarifying RHNA, SCAG, and HCD processes and requirements, refining the scope and clarifying the roles and responsibilities of all parties involved, identifying major milestones and dates for intermediate deliverables, and establishing communication expectations and coordinate procedures.

Task 4.B 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 that has not been previously compiled.

Task 4.C Project Management

LWC will maintain a close working relationship with the City, through open and frequent email, phone, and videoconference communication. LWC will schedule regular conference calls with City staff to provide progress updates, gather feedback, and assure the work is accomplished in an effective and timely manner.

Deliverables

- *List of data needs*
- *Meeting agendas and summary notes with follow-up items*
- *Refined project schedule documenting key milestones and deliverables for the project*

Task 5: Meetings

Task 5.A Community Presentations and Meetings

LWC will lead two (2) public workshops during the development and review of the Housing Element. These events will be held as webinars with presentation material prepared by LWC. City Staff is anticipated to prepare meeting notifications and participate in the meetings to help address community questions. Prior to the meetings, LWC will work with the City to develop an outreach strategy to clarify timing and objectives of the outreach efforts.

Task 5.B Meetings with Planning Commission and City Council

Prior to the adoption of the final Housing Element, LWC will participate in public hearings with both the Planning Commission and City Council to present findings and respond to questions and incorporate recommendations as appropriate. LWC will provide all materials and graphics for these hearings.

Meetings

- *One (1) study session with the Planning Commission and City Council*
- *One (1) public hearing with the Planning Commission*
- *One (1) public hearing with the City Council*

Deliverables

- *Meeting agendas, summaries, and presentations for community engagement meetings*
- *Meeting presentation materials for Planning Commission and City Council meetings*

HOUSING ELEMENT UPDATES & CYCLES

Arroyo Grande	4th & 5th
Atascadero	4th & 5th
Benicia	4th & 5th
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
Richmond	4th & 5th
Santa Maria	6th
Tehachapi	4th & 5th
Tulare	4th
Vallejo	5th

DENSITY BONUS PROGRAMS

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

Austin, TX, Land Development Code Update

Flagstaff, AZ, Zoning Ordinance Update

Livermore, CA, Development Code Update and Form-Based Code

Lompoc, CA, Zoning Ordinance Update

Mammoth Lakes, CA, Affordable Housing Conceptual Land Use Plan

Pismo Beach, CA, 360 Park Affordable Housing RFP Process Management

HOUSING ELEMENT IMPLEMENTATION

Atascadero, CA, Housing Element Implementation

Pismo Beach, CA, Housing Element Implementation

Richmond, CA, Assessment and Development of Fair Housing Ordinances, Implementation of Priorities in the General Plan

For over 14 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, if necessary, making additional sites available, and
- Attaining HCD approval of the Housing Element Update.

LWC has a thorough understanding of State housing law and has worked with over 15 jurisdictions on successful 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 for housing development, facilitating housing 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 with special interest groups, property and business owners, civic leaders, elected officials, City staff, and the housing community.

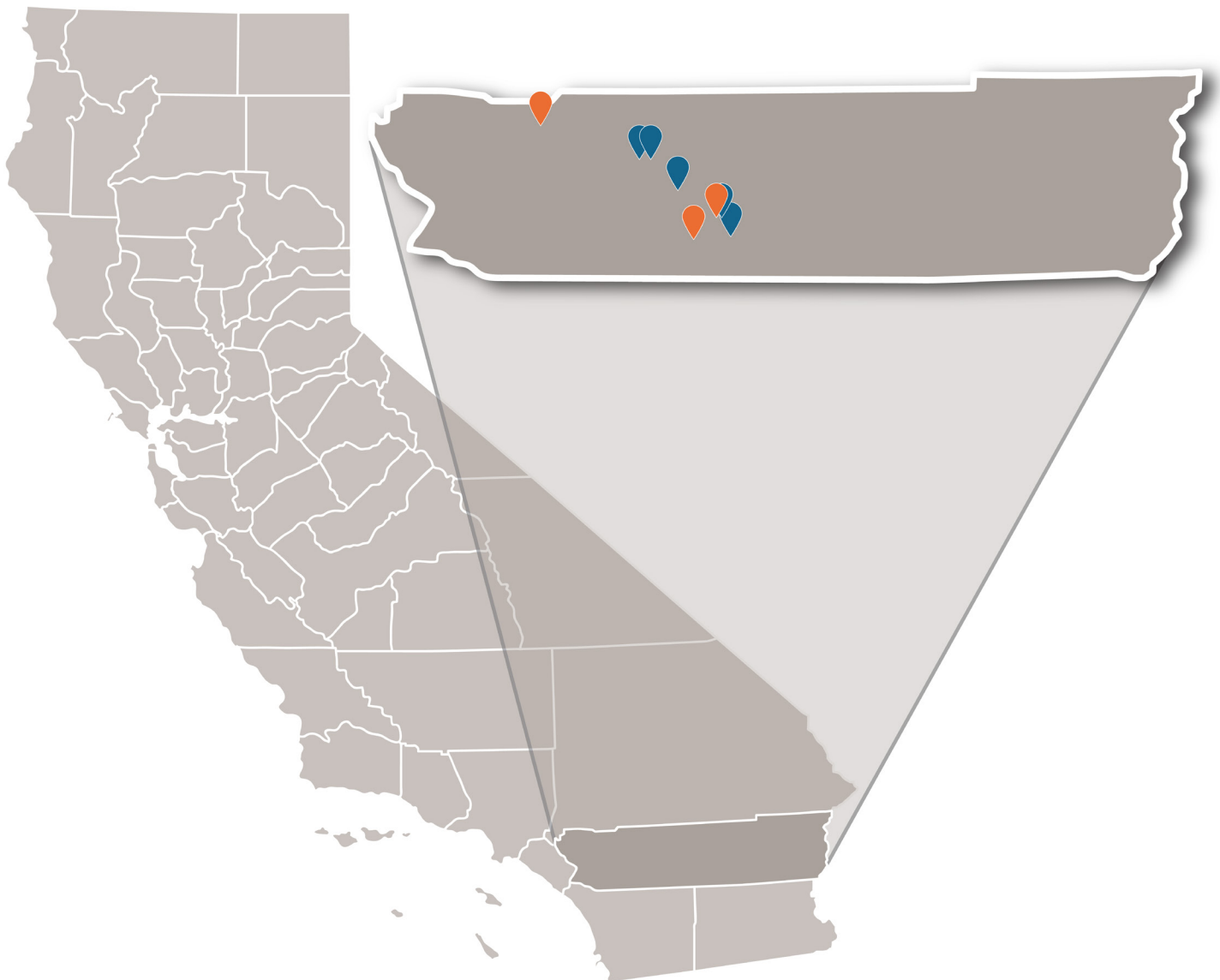
LWC's housing resume also includes the assessment and development of Fair Housing Ordinances, Short Sale Provision for a Moderate-Income Affordable Housing Program and advising cities on the evaluation and selection of a development team to build affordable housing on a City-owned property. LWC has also developed inclusionary housing programs in Austin, TX, Flagstaff, AZ, Livermore and Lompoc, CA as part of our city-wide zoning ordinance update work.



COACHELLA VALLEY EXPERIENCE

The following projects reflect our team's diverse experiences working in the Coachella Valley:

- City of Beaumont General Plan Update
- City of Palm Springs Hotel Market Analysis
- City of Cathedral City General Plan Update
- City of Palm Desert General Plan Update
- City of Indio Zoning Code Update
- City of Indio General Plan Update
- City of La Quinta Form-Based Code
- City of Coachella La Plaza East Study



The image depicts projects managed directly by LWC (orange pin 📍), and projects managed by David Bergman in his former capacity as Principal at MR+E (blue pin 📍), an urban planning economics consulting firm. David joined LWC in January of 2020.

STATUS:

4th Cycle Adopted by City Council, January 2011
Certified by HCD April 2011

5th Cycle Adopted by City Council, January 2015
Certified by HCD April 2015

TIMEFRAME:

4th Cycle - 2009 - 2011

5th Cycle - 2014 - 2015

BUDGET:

4th Cycle - \$53,130

5th Cycle - \$22,740

REFERENCE:

Warren Frace
(Former), Director,
Community Development
City of Atascadero
(Current) Community
Development Director
City of Paso Robles
Phone: 805-237-3970
Email: wfrace@prcity.com

LWC was hired by the City of Atascadero to prepare the 4th Cycle Housing Element for the 2007-2014 planning period and the 5th Cycle Housing Element for 2015-2023 period. Atascadero is a small, residential community with a growing downtown area located in Northern San Luis Obispo County.

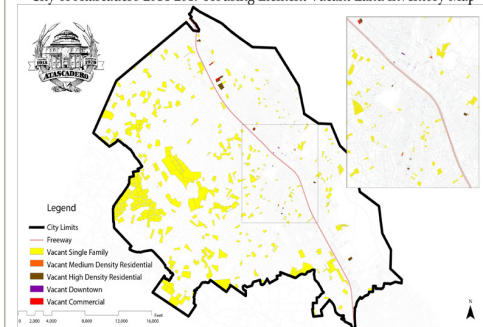
LWC worked closely with City Staff to identify opportunities and constraints given Atascadero's Regional Housing Needs Allocation (RHNA), approval by the Department of Housing and Community Development (HCD) and unanimous adoption by the City Council.

LWC achieved community engagement objectives by facilitating a Public Workshop, Planning Commission Workshop and contacting over 25 local and regional housing related organizations to gather input on access to housing in the City. Groups include Habitat for Humanity, People's Self-help Housing, and Central Coast Commission for Senior Citizens and Transitions Mental Health.

After assessing demographic and socio-economic conditions on rental and homeownership prices, LWC identified vacant, underutilized and redevelopable sites, and physical and environmental barriers to housing production. Based on these findings and the City's RHNA, LWC worked closely with the City and the community to create policies and programs aimed at meeting the housing needs of all income levels as well as special groups such as elderly, disabled, and single parents. LWC helped the city in developing clear policy and program language to demonstrate compliance with recently adopted legislation pertaining to the definition of family, needs for person with developmental disabilities, and persons experiencing homelessness.

LWC worked closely with City staff to submit draft documents to the Planning Commission and City Council and make revisions requested by HCD to ensure the 4th and 5th Cycle Housing Element Updates were certified by the State.

City of Atascadero 2014-2019 Housing Element Vacant Land Inventory Map



STATUS:

Ongoing

TIMEFRAME:

2020 - 2021

BUDGET:

\$927,000

REFERENCE:

Patricia Deifenderfer
Advanced Planning Officer
City of Long Beach
411 W. Ocean Blvd., 3rd Floor
Long Beach, CA 90802
562-570-6261
[patricia.diefenderfer@
longbeach.gov](mailto:patricia.diefenderfer@longbeach.gov)

LWC is currently leading the development of a Housing Element Update for the City of Long Beach. With a population of over 460,000, Long Beach is the 7th largest city in California and represents a diverse and complex set of community conditions and overlapping land use regulations.

The team has conducted four community-wide forums that introduced the project, provided an overview of local housing conditions, and solicited feedback on both the current housing element goals and potential policy solutions. In order to engage a broad representation of the community, 2 workshops were held in Spanish.

In the preparation of the Housing Element Update, key tasks have included a GIS-driven site identification process that examined over 86,000 eligible parcels. This work was supported by a detailed analysis of opportunities at key development sites. Ongoing work includes evaluating constraints to housing production in the city and the preparation of policies and plan documents that will conform to the State of California's requirements for Housing Elements. Because of Long Beach's size and diversity, critical issues that are being considered include the need to affirmatively further fair housing and to identify enough suitable site for below-market rate housing in an already developed city.



STATUS:

4th Cycle Certified June
2014
5th Cycle Certified
December 2015

TIMEFRAME:

4th Cycle- 2012 - 2014
5th Cycle- 2015 - 2015

BUDGET:

5th Cycle \$29,092
4th Cycle \$23,940

REFERENCE:

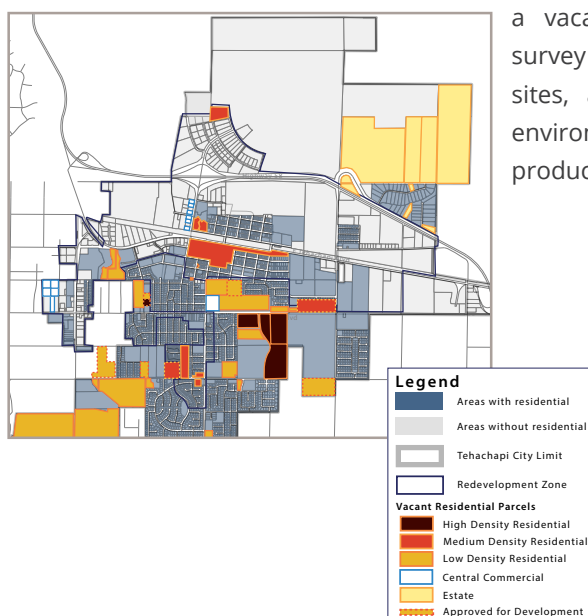
Jay Schlosser
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tehachapicityhall.com](mailto:jschlosser@tehachapicityhall.com)

LWC was retained by the City of Tehachapi to prepare the 4th and 5th Cycle Housing Elements. LWC worked closely with City Staff to craft a Housing Element that complies with State law and is tailored to Tehachapi's unique characteristics, opportunities, and constraints.

Tehachapi is a small mountain town in southern California, located 35 miles south of Bakersfield. The goal of the Housing Element is to maintain the small town character while also conserving existing affordable housing; providing adequate housing sites; assisting in the development of affordable housing; removing constraints to housing development; and promoting equal housing opportunities. LWC worked analyzed the latest data on rental and homeownership prices to assess cost burden, performed a vacant and underutilized land survey to identify opportunity sites, and assessed physical and environmental barriers to housing production.

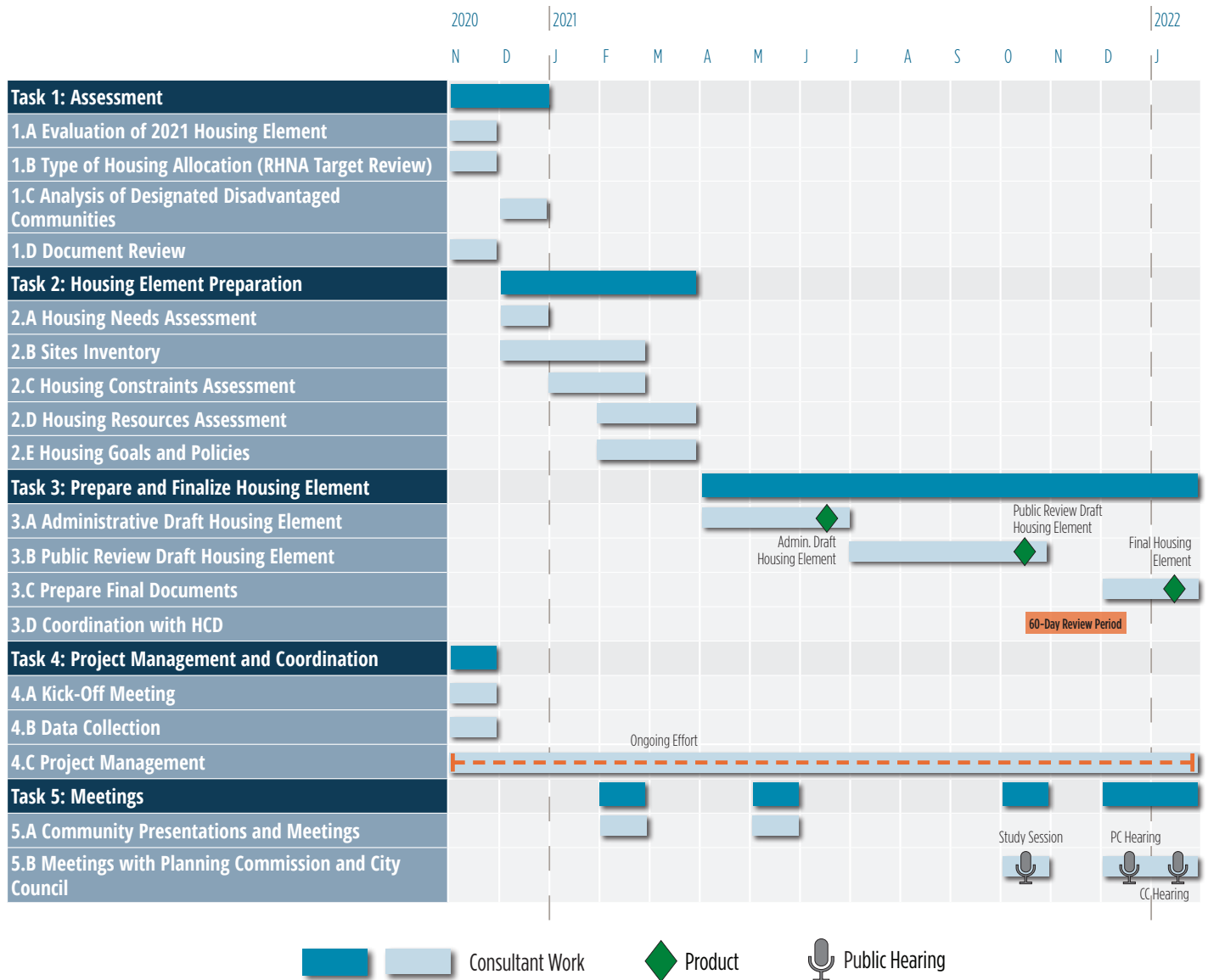
After the 4th Cycle, the City adopted a new form-based zoning code that regulated form without providing maximum residential densities. A key challenge during the 5th Cycle update was adequately demonstrating to the State department of Housing and Community Development (HCD) that the City had adequate opportunity sites at minimum densities to accommodate their Regional Housing Needs Allocation for low-, very low-, and extremely low-income households. LWC, who also led the Code update, was able to translate the City's transect-based zoning regulations into effective densities, based on lot size, building typology, building massing and form standards, and parking requirements.

LWC worked closely with City staff and HCD to submit draft documents and make revisions throughout the process to ensure adoption by City Council and certification by the State.



Implementation Plan

SCHEDULE



Financial Responsibility

At the City's request, LWC is prepared to provide financial statements or other evidence of the firm's financial capability to perform the required services.

LISA WISE, AICP

President, Owner

As a certified planner and public accountant, Lisa has over 30 years of professional experience in land use planning, 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, and has recently received the CNU Paul Crawford award for Excellence in Planning. 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
- Vallejo, CA, Housing Element Update 5th Cycle
- Tehachapi, CA, Housing Element Update 4th and 5th Cycle

LWC



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

DAVID BERGMAN

Director

LWC

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:

- 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 certification by the California Department of Housing and Community Development (HCD) and adoption by the cities. She has led several large-scale, complex development code 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
- 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, Housing Element Update
- Lompoc, CA, Zoning Code Update
- 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



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

KAREN HUYNH

Associate

LWC

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:

- 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
- Santa Maria, CA, General Plan Update, Market Analysis, Housing Element Update and Annexation Study
- Santa Monica, CA, Affordable Housing Production Program Update
- Urban Land Institute, Assessment of Health and Social Equity in Real Estate



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

B. Proposers Certification & Proposal Pricing

EXHIBIT C

PROPOSERS CERTIFICATION and PROPOSAL ITEM PRICING

Certification - I certify that I have read, understand and agree to the terms and conditions of this Request for Proposals. I have examined the Scope of Services (Exhibit A) and am familiar with the scope of work locations. I am familiar with all the existing conditions and limitation that may impact work requests. I understand and agree that I am responsible for reporting any errors, omissions or discrepancies to the City for clarification prior to the submission of my proposal.

Proposal Item Price - Pricing shall be based on a fixed-price basis for services described in Exhibit A. Fee must be inclusive of all costs, including but not limited to, direct and indirect costs for labor, overhead, incidental supplies, travel, mileage, and fuel. Any special materials will be purchased by the contractor only after discussed and authorized by the City Contact or designee in writing.

Please attach proposed cost and payment schedule, and hourly rates for assigned personnel.

Lisa Wise Consulting, Inc. Phone: 805.595.1345 Fax: 805.595.1978
LEGAL NAME OF COMPANY PHONE AND FAX NUMBERS

983 Osos Street, San Luis Obispo, CA 93401
BUSINESS ADDRESS

Henry Pontarelli Vice President, Secretary
PRINTED NAME OF AUTHORIZED AGENT TITLE

September 23, 2020 henry@lisawiseconsulting.com
SIGNATURE OF AUTHORIZED AGENT DATE E-MAIL ADDRESS

800155 045 n/a
FEDERAL ID NUMBER (IF APPLICABLE) CONTRACTOR LICENSE NUMBER (IF APPLICABLE)

THIS FORM MUST BE COMPLETED AND INCLUDED WITH THE PROPOSAL.
PROPOSALS THAT DO NOT CONTAIN THIS FORM WILL BE CONSIDERED
NONRESPONSIVE.

City of Coachella 6th Cycle Housing Element Update		LWC, Inc.									
		Principal		Director		Senior Associate		Associate		LWC TOTAL	
		\$275		\$205		\$180		\$145			
		Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost
Task 1 Assessment											
1.A	Evaluation of 2021 Housing Element		\$ -		\$ -	8	\$ 1,440	16	\$ 2,320	24	\$ 3,760
1.B	Type of Housing Allocation (RHNA Target Review)		\$ -		\$ -	4	\$ 720	8	\$ 1,160	12	\$ 1,880
1.C	Analysis of Designated Disadvantaged Communities		\$ -	4	\$ 820	8	\$ 1,440	32	\$ 4,640	44	\$ 6,900
1.D	Document Review	1	\$ 275	2	\$ 410	2	\$ 360	4	\$ 580	9	\$ 1,625
Task 2 Housing Element Preparation											
2.A	Housing Needs Assessment		\$ -		\$ -	8	\$ 1,440	24	\$ 3,480	32	\$ 4,920
2.B	Sites Inventory	2	\$ 550	6	\$ 1,230	16	\$ 2,880	16	\$ 2,320	40	\$ 6,980
2.C	Housing Constraints Assessment	2	\$ 550	4	\$ 820	8	\$ 1,440	24	\$ 3,480	38	\$ 6,290
2.D	Housing Resources Assessment		\$ -	2	\$ 410	4	\$ 720	16	\$ 2,320	22	\$ 3,450
2.E	Housing Goals and Policies	1	\$ 275	2	\$ 410	8	\$ 1,440	16	\$ 2,320	27	\$ 4,445
Task 3 Prepare and Finalize Housing Element											
3.A	Administrative Draft Housing Element	2	\$ 550	4	\$ 820	16	\$ 2,880	48	\$ 6,960	70	\$ 11,210
3.B	Public Review Draft Housing Element	1	\$ 275	2	\$ 410	8	\$ 1,440	16	\$ 2,320	27	\$ 4,445
3.C	Prepare Final Documents		\$ -	2	\$ 410	12	\$ 2,160	24	\$ 3,480	38	\$ 6,050
3.D	Coordination with HCD		\$ -	2	\$ 410	16	\$ 2,880		\$ -	18	\$ 3,290
Task 4 Project Management and Coordination											
4.A	Kick-Off Meeting		\$ -	2	\$ 410	4	\$ 720	6	\$ 870	12	\$ 2,000
4.B	Data Collection		\$ -		\$ -	1	\$ 180	2	\$ 290	3	\$ 470
4.C	Project Management	8	\$ 2,200	24	\$ 4,920	16	\$ 2,880		\$ -	48	\$ 10,000
Task 5 Meetings											
5.A	Community Presentations and Meetings	4	\$ 1,100	12	\$ 2,460	12	\$ 2,160	24	\$ 3,480	52	\$ 9,200
5.B	Meetings with Planning Commission and City Council	6	\$ 1,650	9	\$ 1,845	12	\$ 2,160	24	\$ 3,480	51	\$ 9,135
TOTAL FEE		27	\$ 7,425	77	\$15,785	163	\$29,340	300	\$43,500	567	\$ 96,050
Optional In-Person Meetings - Mileage and Travel: Senior Associate \$1,600 per meeting											

C. References

EXHIBIT D REFERENCES

List and describe fully the contracts performed by your firm which demonstrate your ability to provide the supplies, equipment or services included in the scope of the proposal specifications. Attach additional pages if required. The City reserves the right to contact each of the references listed for additional information regarding your firm's qualifications.

Reference

Customer Name: City of Long Beach Contact Individual: Patricia Deifenderfer
Address: 411 W Ocean Boulevard Phone Number: 562-570-6261
Long Beach, CA 90802 E-mail Address: patricia.diefenderfer@longbeach.gov
Contract Amount: \$927,000 Year: 2020

Description of services and deliverables provided:

6th Cycle Housing Element Update, English and Spanish language workshops, constraints analysis

Number of pages of the deliverable: Deliverable in-progress

Number of staff: 3 staff members

Reference

Customer Name: City of Atascadero Contact Individual: Warren Frace
Address: 6500 Palma Avenue Phone Number: 805-237-3970
Atascadero, CA 93422 E-mail Address: wfrace@prcity.com
Contract Amount: 5th Cycle-\$22,740, 4th Cycle-\$29,000 Year: 2009 and 2014

Description of services and deliverables provided:

4th and 5th Cycle Housing Element Updates, adoption, and HCD Certification

Number of pages of the deliverable: 5th Cycle - 110 pages; 4th cycle - 118 pages

Number of staff: 5th Cycle - 4 staff members; 4th Cycle: 3 staff members

Reference

Customer Name: City of Tehachapi Contact Individual: Jay Schlosser

Address: 115 S Robinson Street Phone Number: 661-822-2200 x 115

Tehachapi, CA 93561 E-mail Address: jschlosser@tehachapicityhall.com

Contract Amount: \$53,000 Year: 2015

Description of services and deliverables provided:

5th Cycle Housing Element Update, adoption and HCD Certification

Number of pages of the deliverable: 5th Cycle - 107 pages

Number of staff: 5th Cycle - 3 staff members

THIS FORM MUST BE COMPLETED AND INCLUDED WITH THE PROPOSAL.
PROPOSALS THAT DO NOT CONTAIN THIS FORM WILL BE CONSIDERED
NONRESPONSIVE.

D. Proposer's Statement

EXHIBIT E

PROPOSER'S STATEMENT

Proposer understands and agrees that this written RFP (or any part thereof specifically designated and accepted by the City of Coachella, hereinafter City) shall constitute the entire agreement between proposer and the City only after it has been accepted by the City Council, endorsed by the City Clerk with her signature and official seal noting hereon the action of approval of the Council, signed by the City Manager or his duly authorized agent, and signed by the City Attorney, denoting his approval of the form of this document, and its execution, and when it or an exact copy of it has been either delivered to proposer or deposited with the United States Postal Service properly addressed to the proposer with the correct postage affixed thereto.

Proposer further agrees that upon delivery (as defined above) of the accepted agreement he/she will furnish City all required bonds and certificate of liability insurance within ten (10) days (excluding Saturdays, Sundays and City's legal holidays), or the funds, check, draft, or proposer's bond substituted in lieu thereof accompanying this proposal shall become the property of the City and shall be considered as payment of damages due to the delay and other causes suffered by City because of the failure to furnish the necessary bonds and because it is distinctly agreed that the proof of damages actually suffered by City is difficult to ascertain; otherwise said funds, check drafts, or proposer's bond substituted in lieu thereof shall be returned to the undersigned.

Proposer understands that a proposal is required for the entire work, that the estimated quantities set forth in the RFP schedule are solely for the purpose of comparing proposals, and that final compensation under the contract will be based upon the actual quantities of work satisfactorily completed.

All terms contained in the specifications, the certification of nondiscrimination by contractors, and the required insurance certificates are to be incorporated by reference into this agreement and are made specifically as part of this RFP.

Firm Lisa Wise Consulting, Inc.

and Printed Name: Henry Pontarelli

Title Vice President, Secretary

Date September 23, 2020

THIS FORM MUST BE COMPLETED AND INCLUDED WITH THE PROPOSAL.
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E. Additional Insured Endorsement for Commercial General Liability Policy

LWC has reviewed and is able to comply with the tenets of the Insurance clause in Exhibit B (Sample Professional Services Agreement) and in Exhibit F (Sample Additional Insured Endorsement for Commercial General Liability Policy) and will provide Certificates of Insurance in accordance thereof at or prior to the execution of the contract.



SAN LUIS OBISPO



SAN FRANCISCO



LOS ANGELES

