

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made and entered into on February 26, 2025 by and between TOWN OF LOS GATOS, a California municipal corporation, ("Town") and Lisa Wise Consulting, Inc. ("Consultant"), whose address is 983 Osos Street, San Luis Obispo, CA 93401. This Agreement is made with reference to the following facts.

I. RECITALS

- 1.1 The Town desires to engage Consultant to provide Objective Design Standards services.
- 1.2 The Consultant represents and affirms that it is willing to perform the desired work pursuant to this Agreement.
- 1.3 Consultant warrants it possesses the distinct professional skills, qualifications, experience, and resources necessary to timely perform the services described in this Agreement. Consultant acknowledges Town has relied upon these warranties to retain Consultant.

II. AGREEMENTS

- 2.1 **Scope of Services.** Consultant shall provide services as described in that certain Objective Design Standards Consultant Services Proposal sent to the Town on October 26, 2024, which is hereby incorporated by reference and attached as Attachment 1.
- 2.2 **Term and Time of Performance.** This contract will remain in effect from Upon Execution to June 30, 2026. Consultant shall perform the services described in this Agreement as follows: Objective Design Standards Consultant Services.
- 2.3 **Compliance with Laws.** The Consultant shall comply with all applicable laws, codes, ordinances, and regulations. Consultant represents and warrants to Town that it has all licenses, permits, qualifications, and approvals of whatsoever nature which are legally required for Consultant to practice its profession. Consultant shall maintain a Town of Los Gatos business license pursuant to Chapter 14 of the Code of the Town of Los Gatos.
- 2.4 **Sole Responsibility.** Consultant shall be responsible for employing or engaging all persons necessary to perform the services under this Agreement.
- 2.5 **Information/Report Handling.** All documents furnished to Consultant by the Town and all reports and supportive data prepared by the Consultant under this Agreement are the Town's property and shall be delivered to the Town upon the completion of Consultant's services or at the Town's written request. All reports, information, data, and exhibits prepared or assembled by Consultant in connection with the performance of its services pursuant to this Agreement are confidential until released by the Town to the public, and the Consultant shall not make any of the these documents or information available to any individual or organization not employed by the Consultant or the Town without the written consent of the Town before such release. The Town acknowledges that the reports

to be prepared by the Consultant pursuant to this Agreement are for the purpose of evaluating a defined project, and Town's use of the information contained in the reports prepared by the Consultant in connection with other projects shall be solely at Town's risk, unless Consultant expressly consents to such use in writing. Town further agrees that it will not appropriate any methodology or technique of Consultant which is and has been confirmed in writing by Consultant to be a trade secret of Consultant.

2.6 Compensation. Compensation for Consultant's professional services shall not exceed \$189,646 at the rates set forth on page 39 in Attachment 1, Objective Design Standards Consultant Services Proposal, inclusive of all costs. Payment shall be based upon Town approval of each task.

2.7 Billing. Billing shall be monthly by invoice within thirty (30) days of the rendering of the service and shall be accompanied by a detailed explanation of the work performed by whom, at what rate, and on what date. Also, plans, specifications, documents, or other pertinent materials shall be submitted for Town review, even if only in partial or draft form.

Payment shall be net thirty (30) days. All invoices and statements to the Town shall be addressed as follows:

Invoices:

Town of Los Gatos
Attn: Accounts Payable
P.O. Box 655
Los Gatos, CA 95031-0655

2.8 Availability of Records. Consultant shall maintain the records supporting this billing for not less than three years following completion of the work under this Agreement. Consultant shall make these records available to authorized personnel of the Town at the Consultant's offices during business hours upon written request of the Town.

2.9 Assignability and Subcontracting. The services to be performed under this Agreement are unique and personal to the Consultant. No portion of these services shall be assigned or subcontracted without the written consent of the Town.

2.10 Independent Contractor. It is understood that the Consultant, in the performance of the work and services agreed to be performed, shall act as and be an independent contractor and not an agent or employee of the Town. As an independent contractor he/she shall not obtain any rights to retirement benefits or other benefits which accrue to Town employee(s). With prior written consent, the Consultant may perform some obligations under this Agreement by subcontracting, but may not delegate ultimate responsibility for performance or assign or transfer interests under this Agreement. Consultant agrees to testify in any litigation brought regarding the subject of the work to be performed under this Agreement. Consultant shall be compensated for its costs and expenses in preparing for, traveling to, and testifying in such matters at its then current hourly rates of

compensation, unless such litigation is brought by Consultant or is based on allegations of Consultant's negligent performance or wrongdoing.

2.11 **Conflict of Interest.** Consultant understands that its professional responsibilities are solely to the Town. The Consultant has and shall not obtain any holding or interest within the Town of Los Gatos. Consultant has no business holdings or agreements with any individual member of the Staff or management of the Town or its representatives nor shall it enter into any such holdings or agreements. In addition, Consultant warrants that it does not presently and shall not acquire any direct or indirect interest adverse to those of the Town in the subject of this Agreement, and it shall immediately disassociate itself from such an interest, should it discover it has done so and shall, at the Town's sole discretion, divest itself of such interest. Consultant shall not knowingly and shall take reasonable steps to ensure that it does not employ a person having such an interest in this performance of this Agreement. If after employment of a person, Consultant discovers it has employed a person with a direct or indirect interest that would conflict with its performance of this Agreement, Consultant shall promptly notify Town of this employment relationship, and shall, at the Town's sole discretion, sever any such employment relationship.

2.12 **Equal Employment Opportunity.** Consultant warrants that it is an equal opportunity employer and shall comply with applicable regulations governing equal employment opportunity. Neither Consultant nor its subcontractors do and neither shall discriminate against persons employed or seeking employment with them on the basis of age, sex, color, race, marital status, sexual orientation, ancestry, physical or mental disability, national origin, religion, or medical condition, unless based upon a bona fide occupational qualification pursuant to the California Fair Employment & Housing Act.

III. INSURANCE AND INDEMNIFICATION

3.1 Minimum Scope of Insurance:

- i. Consultant agrees to have and maintain, for the duration of the contract, General Liability insurance policies insuring him/her and his/her firm to an amount not less than: two million dollars (\$2,000,000) combined single limit per occurrence for bodily injury, personal injury, and property damage.
- ii. Consultant agrees to have and maintain for the duration of the contract, an Automobile Liability insurance policy ensuring him/her and his/her staff to an amount not less than one million dollars (\$1,000,000) combined single limit per accident for bodily injury and property damage.
- iii. Consultant shall provide to the Town all certificates of insurance, with original endorsements effecting coverage. Consultant agrees that all certificates and endorsements are to be received and approved by the Town before work commences.

- iv. Consultant agrees to have and maintain, for the duration of the contract, professional liability insurance in amounts not less than one million dollars (\$1,000,000) which is sufficient to insure Consultant for professional errors or omissions in the performance of the particular scope of work under this agreement.

General Liability:

- i. The Town, its officers, officials, employees, and volunteers are to be covered as insured as respects: liability arising out of activities performed by or on behalf of the Consultant; products and completed operations of Consultant; and premises owned or used by the Consultant. This requirement does not apply to the professional liability insurance required for professional errors and omissions.
- ii. The Consultant's insurance coverage shall be primary insurance as respects the Town, its officers, officials, employees, and volunteers. Any insurance or self-insurances maintained by the Town, its officers, officials, employees, or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.
- iii. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the Town, its officers, officials, employees, or volunteers.
- iv. The Consultant's insurance shall apply separately to each insured against whom a claim is made or suit is brought, except with respect to the limits of the insurer's liability.

3.2 All Coverages. Each insurance policy required in this item shall be endorsed to state that coverage shall not be suspended, voided, cancelled, or reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the Town. Current certification of such insurance shall be kept on file at all times during the term of this Agreement with the Town Clerk.

3.3 Workers' Compensation. In addition to these policies, Consultant shall have and maintain Workers' Compensation insurance as required by California law and shall provide evidence of such policy to the Town before beginning services under this Agreement. Further, Consultant shall ensure that all subcontractors employed by Consultant provide the required Workers' Compensation insurance for their respective employees.

3.4 Indemnification. The Consultant shall save, keep, hold harmless and indemnify, and defend the Town its officers, agent, employees, and volunteers from all damages, liabilities, penalties, costs, or expenses in law or equity that may at any time arise or be set up

because of damages to property or personal injury received by reason of, or in the course of performing work which may be occasioned by a willful or negligent act or omissions of the Consultant, or any of the Consultant's officers, employees, or agents or any subconsultant.

IV. GENERAL TERMS

- 4.1 **Waiver.** No failure on the part of either party to exercise any right or remedy hereunder shall operate as a waiver of any other right or remedy that party may have hereunder, nor does waiver of a breach or default under this Agreement constitute a continuing waiver of a subsequent breach of the same or any other provision of this Agreement.
- 4.2 **Governing Law.** This Agreement, regardless of where executed, shall be governed by and construed to the laws of the State of California. Venue for any action regarding this Agreement shall be in the Superior Court of the County of Santa Clara.
- 4.3 **Termination of Agreement.** The Town and the Consultant shall have the right to terminate this agreement with or without cause by giving not less than fifteen days (15) written notice of termination. In the event of termination, the Consultant shall deliver to the Town all plans, files, documents, and reports, performed to date by the Consultant. In the event of such termination, Town shall pay Consultant an amount that bears the same ratio to the maximum contract price as the work delivered to the Town bears to completed services contemplated under this Agreement, unless such termination is made for cause, in which event, compensation, if any, shall be adjusted in light of the particular facts and circumstances involved in such termination.
- 4.4 **Amendment.** No modification, waiver, mutual termination, or amendment of this Agreement is effective unless made in writing and signed by the Town and the Consultant.
- 4.5 **Disputes.** In any dispute over any aspect of this Agreement, the prevailing party shall be entitled to reasonable attorney's fees, including costs of appeal.
- 4.6 **Notices.** Any notice required to be given shall be deemed to be duly and properly given if mailed postage prepaid, and addressed to:

Town of Los Gatos
Attn: Town Clerk
110 E. Main Street
Los Gatos, CA 95030

Lisa Wise Consulting, Inc.
Attn: Lisa Wise
983 Osos Street
San Luis Obispo, CA 93401

or personally delivered to Consultant to such address or such other address as Consultant designates in writing to Town.

4.7 **Order of Precedence.** In the event of any conflict, contradiction, or ambiguity between the terms and conditions of this Agreement in respect of the Products or Services and any attachments to this Agreement, then the terms and conditions of this Agreement shall prevail over attachments or other writings.

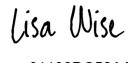
4.8 **Entire Agreement.** This Agreement, including all Exhibits, constitutes the complete and exclusive statement of the Agreement between the Town and Consultant. No terms, conditions, understandings or agreements purporting to modify or vary this Agreement, unless hereafter made in writing and signed by the party to be bound, shall be binding on either party.

IN WITNESS WHEREOF, the Town and Consultant have executed this Agreement.

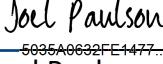
Town of Los Gatos by:

Signed by:
 3/4/2025
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Chris Constantin, Town Manager Date

Consultant, by:

DocuSigned by:
 2/26/2025
611138DC52AAE4AD...
Lisa Wise, AICP, President, CEO Date
Lisa Wise Consulting, Inc.

Recommended by:

Signed by:
 2/27/2025
5035A0632FE1477...
Joel Paulson, Date
Community Development Director

Approved as to Form:

Signed by:
 3/4/2025
EF0750A55534428...
Gabrielle Whelan, Town Attorney Date

Attest:

Signed by:
 3/4/2025
20A720CAAE6A1D9...
Wendy Wood, CMC, Town Clerk Date

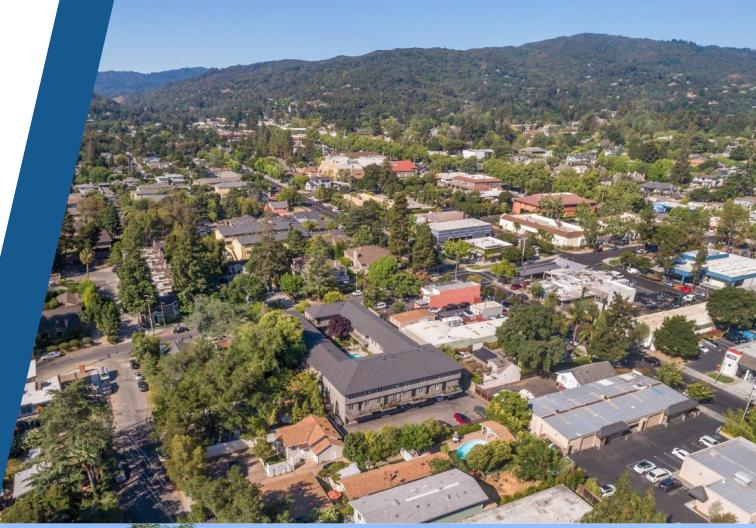
LWC

TOWN OF LOS GATOS

**Updated/Additional Objective
Design Standards for Qualifying
Multi-Family and Mixed-Use
Residential Developments**

Response to Request for Proposals

October 26, 2024



ATTACHMENT 1

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TABLE OF CONTENTS

COVER LETTER	3
CERTIFICATION FORMS	5
REVIEW OF SCOPE OF SERVICES	8
EXPERIENCE AND EXPERTISE	12
Lisa Wise Consulting, Inc.	12
Urban Planning Partners, Inc.	19
QUALIFICATIONS OF KEY PERSONNEL	23
TIMELINE	32
SAMPLES	33
DISCLOSURE OF LITIGATION/DISCIPLINE	33
REFERENCES	34
INSURANCE COVERAGE	36
PRELIMINARY FEE SCHEDULE	37

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COVER LETTER

October 26, 2024

LWC

Sean Mullin, Planning Manager
Alexa Nolder, Administrative Technician
Town of Los Gatos
Community Development Department
110 E. Main Street
Los Gatos, CA 95030
(408) 354-6864
Planning@losgatosca.gov

Re: Lisa Wise Consulting, Inc. Proposal for Objective Design Standards Consultant Services

Dear Sean and Alexa,

On behalf of our qualified and motivated team, we are pleased to submit this proposal to provide the Town of Los Gatos with professional services for the development of complete Objective Design Standards that reflect the Town's unique scale and character and meet the community's high standards for building design. As a firm that is dedicated to working with California communities to ensure compliance with state housing legislation and to ensure that the community's priorities and preferences are reflected in design standards, this is a target project for us.

Lisa Wise Consulting, Inc. (LWC) is uniquely qualified to lead this engagement given our expertise in California housing law, experience completing Objective Design Standards in similar communities, and deep resume of rezoning, zoning code updates, and community design. LWC's resume includes creating feasible and SB330-compliant Objective Design Standards in communities such as Portola Valley, Saratoga, Piedmont, Los Altos, South San Francisco, Woodland, Seal Beach, Millbrae, Marin County, and Beaumont, as well as leading 16 successful Housing Element Updates in the 6th Cycle. In our ODS engagements, we bring not only a deep knowledge of codes and buildings, but also expertise in custom visualizations using a combination of SketchUp and Illustrator (see Task 3B), as well as related analysis to ensure that proposed standards result in economically feasible projects (see Optional Task C).

Our Team also includes Oakland-based Urban Planning Partners (UPP), experts in planning policy, development services, and community engagement. UPP will work closely with LWC and the Town to implement an inclusive and substantive community engagement effort and to support the Team in key document review and context assessment. LWC and UPP have a proven partnership in the successful delivery of objective design standards in Saratoga and Portola Valley.

Our Team is further uniquely qualified for this project given the skills and experience of the project team members. As the President and CEO of LWC with over 30 years of leading complex planning

engagements, I will be the Principal in Charge and responsible for compliance with the tenets of the contract, accurate invoicing, adherence with the timeline and assurance that deliverables are of the highest quality. David Bergman, LWC Director, brings over 25 years of experience. David led successful 6th Cycle Housing Elements and Rezoning projects in Novato, Piedmont, Alameda County and Long Beach. David will serve as Director in Charge and set strategies for research and deliverables, assure milestones are met and deliverables are complete, accurate, and exceed the Town's expectations. Monica Szydlik brings over 18 years of architecture and urban planning expertise. Monica led successful Objective Design Standard projects in Los Altos, Piedmont, South San Francisco, Saratoga, Woodland, and Millbrae, and residential guidelines in Redwood City. Monica will serve as Project Manager and oversee all research, development of draft and final documents, and close communication with the Town and internal team. Monica and I work out of LWC's San Francisco office.

From UPP, Curtis Banks brings over 30 years in planning and community development, having managed a wide variety of residential and non-residential projects. Curtis has spent his entire career working for communities in Santa Clara and San Mateo counties (including as consultant to Los Gatos) and is currently overseeing projects in Saratoga and Newark. Carla Violet brings over 10 years of urban planning, community design experience. Carla has managed several community outreach and engagement efforts customized to address specific project objectives, anticipated challenges and opportunities, and community concerns. Carla will oversee the UPP team's close collaboration with LWC and execution of technical design elements that prioritize the highly valued aesthetics of neighborhood and community character in Los Gatos.

As our qualifications indicate, LWC and UPP are leaders in creating development regulations and design standards that facilitate the production of diverse housing opportunities and compliant, prosperous and equitable communities.

The LWC/UPP Team appreciates the opportunity to provide this proposal, and the Town's contract template is acceptable to our Team. We look forward to your positive response and remain available to provide additional input or respond to questions or comments.

Sincerely,



Lisa Wise, AICP, President, CEO
870 Market Street, Suite 977
San Francisco, CA 94102
lisa@lisawiseconsulting.com
(805) 595-1345

CERTIFICATION FORMS

ATTACHMENT 1 - CONFLICT OF INTEREST STATEMENT

THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

OBJECTIVE DESIGN STANDARDS CONSULTANT SERVICES

The undersigned declares:

I/We Lisa Wise Consulting, Inc. (Insert Name) have the following financial, business, or other relationship with Town of Los Gatos that may have an impact upon the outcome of the contract. If none, please specify that no other relationships may have an impact on this contract or Project.

Neither LWC owners or staff have had, nor do we have relationships with the Town of Los Gatos the will have any impact on this project.

I/We Lisa Wise Consulting, Inc. (Insert Name) have the following current clients who may have a financial interest in the outcome of this contract. If none, please specify that no other clients may have a financial interest with an impact on this contract or Project.

Neither LWC owners or staff have had, nor do we have other clients who may have financial interest in the outcome of this project.

Pursuant to Government Code section 1090 and any other laws, rules and regulations that may apply, the Proposer covenants that neither it, its subcontractors nor employees presently have an interest, and shall not acquire any interest, direct or indirect, financial or otherwise that would conflict in any manner or degree with contract awarded from this RFP. Proposer certifies that to the best of its knowledge, no one who has or will have any financial interest in the contract awarded from this RFP is an officer or employee of the Town. Through its submittal of a proposal, Proposer acknowledges that it is familiar with Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California and will immediately notify the Town if it becomes aware of any facts concerning the contract to be awarded that constitute a violation of said provisions.

Furthermore, if there is reason to believe that collusion exists among the Proposers, the Town may refuse to consider proposals from participants in such collusion. No person, firm, or corporation under the same or different name, shall make, file, or be interested in more than one proposal for the same

work unless alternate proposals are called for. A person, firm, or corporation who has submitted a sub-proposal to a Proposer, or who has quoted prices on materials to a Proposer, is not thereby disqualified from submitting a sub-proposal or quoting prices to other Proposers. Reasonable ground for believing that any Proposer is interested in more than one proposal for the same work will cause the rejection of all proposals for the work in which a Proposer is interested. If there is reason to believe that collusion exists among the Proposers, the Town may refuse to consider proposals from participants in such collusion. Proposers shall submit as part of their proposals documents the completed Non-Collusion Declaration provided herein.

I, on behalf of the Proposer, declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on October 18, 2024
 [date], at San Francisco [city], California [state].

Lisa Wise Consulting, Inc.

Vice President, Secretary

Proposer Name

(Person, Firm, Corp.)

Title of Authorized Representative

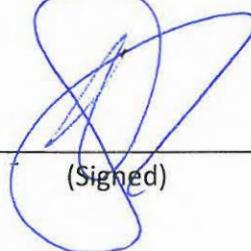
983 Osos Street

Henry Pontarelli

Address

Name of Authorized Representative

San Luis Obispo, CA 93401



City, State, Zip

(Signed)

October 18, 2024

(Date)

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of SAN FRANCISCO

On 10/18/2024 before me, FRANCISCO NAKASONE-TAMASHIRO, NOTARY PUBLIC

(Date)

(Here Insert Name and Title of the Officer)

personally appeared HENRY PONTARELLI

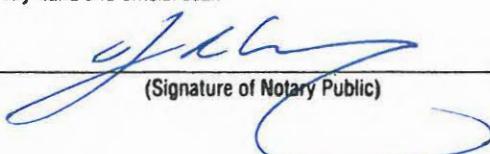
(Name(s) of Signer(s))

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

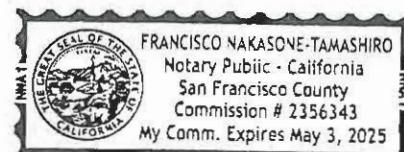
I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature



(Seal)



**ATTACHMENT 3 - STATEMENT REGARDING INSURANCE COVERAGE AND WORKER'S COMPENSATION
INSURANCE ACKNOWLEDGMENT CERTIFICATE**

THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

OBJECTIVE DESIGN STANDARDS CONSULTANT SERVICES

PROPOSER HEREBY CERTIFIES that the Proposer has reviewed and understands the insurance coverage requirements specified in the RFP. Should the Proposer be awarded a contract for Services, Proposer further certifies that the Proposer can meet the specified requirements for insurance, including insurance coverage of any subcontractors, and agrees to name the Town as additional insured for the Services specified.

By certifying this form, the Proposer also understands the Worker's Compensation insurance requirement per the California Labor Code, Sections 1860 and 1861:

I am aware of the provisions of Section 3700 of the Labor Code, which require every employer to be insured against liability for worker's compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Lisa Wise Consulting, Inc.

Name of Proposer (Person, Firm, or Corporation)

Signature of Proposer's Authorized Representative

Henry Pontarelli, Vice President, Secretary

Name & Title of Authorized Representative

October 18, 2024

Date of Signing

REVIEW OF SCOPE OF SERVICES

Task 1: Project Initiation and Analysis

A. Project Initiation Meeting and Site Tour. The consulting team will meet in-person with Town staff to discuss the goals and priorities for the Updated/Additional Objective Design Standards; finalize the work program, timeline, and milestones; discuss the outreach program; and clarify roles and responsibilities. Following the meeting, Town staff will lead the team on a tour of the Town to understand existing character, visit key housing opportunity sites, and document the intensity, forms, and character of Los Gatos neighborhoods. A key part of the tour will be a discussion about the Town staff's experience with community expectations and what is important from a design perspective to achieve desired development outcome.

B. Technical Analysis, Site Analysis, and Evaluation. LWC will prepare a Technical Analysis, Site Analysis and Evaluation that addresses the following:

- Applicable ordinances, plans, and policy documents including General Plan 2040, Residential Design Guidelines, Commercial Design Guidelines, and Chapter 29 of the Town Code (Zoning Regulations).
- The adopted Objective Design Standards and Checklist (yes/no and B.4.3 points system).
- Evaluation of existing typical development projects that demonstrate local context and character.
- Documentation of recent, pipeline, and proposed development projects.
- Council direction related to high-quality building design, architectural style, and height transitions.**
- Design and feasibility considerations for small multi-family housing types including townhomes, triplexes and fourplexes, "house-scale" small multi-unit buildings, and other small-scale configurations.**

Prior to preparation of the Analyses and Evaluation, the consulting team will prepare and submit to the Town a data request for material related to the Project. This may include but is not limited to unpublished GP and Zoning amendments, a list of Staff's zoning interpretations, minutes of hearing design review discussions, GIS data, original files from the adopted Objective Design Standards, and other material relevant to the Project.

C. Updated/Additional Objective Design Standards

Recommendations Memo. Based on the Technical Analyses and Town staff comments, the consulting team will prepare a Recommendations Memo. The Memo will outline recommendations for:

- Revised content.** Changes to existing standards and recommended new standards, with a focus on building massing, height transitions, building design and articulation, and architectural style, and Town character and scale. This includes recommendations for revisions to existing graphics/illustrations and preparation of new graphics/illustrations.
- Organization and implementation.** How the material may be added to or integrated within the existing Town's regulatory framework to facilitate streamlined ministerial review. This includes recommendations for how the standards may be administered and reviewed (yes/no, point system, allowed modifications, etc.).

Task 2: Community Engagement

A. Community Engagement Program. LWC will prepare a Community Engagement Program outlining a public process that enables the community to review and comment on the Updated/Additional Objective Design Standards as they are being formulated. The Program will refine Task 2 of the Scope of Work as needed to ensure that approaches and formats used will be most effective for the Los Gatos community; that the community has ample opportunity to express its values and priorities for residential design; and, that, ultimately, the community has ownership of the process.

B. Focus Group Meetings (2). The consulting team will hold two virtual small-group (up to four individuals per group) meetings with key stakeholders. Stakeholders, to be identified and contacted by Town staff, are anticipated to include local designers/architects, developers, neighborhoods representatives, residents of mixed-use or multi-family areas of Los Gatos, real estate professionals, or other interested code users. The goals of the meetings are to identify important issues and constraints to residential design; hear the group members' design preferences and priorities;

and understand the group members' views on the feasibility and marketability of various design features and standards.

The consulting team will prepare an introductory presentation, identify discussion topics, and lead the discussion. Following the meetings, the consulting team will summarize the feedback collected and identify ways to incorporate feedback into the standards.

C. Community Workshop. The consulting team will design and facilitate an in-person interactive community workshop prior to drafting of the Administrative Draft Standards. The workshop will:

- **Introduce the project to the community.** The workshop will begin with a presentation on the project background, recent State housing legislation, and Town policy goals and standards. The presentation will describe the advantages of ODS for small towns like Los Gatos and underscore the role of community members in developing them. The community will also gain the vocabulary needed to provide impactful feedback once the draft standards are ready for public review.
- **Solicit input from the community.** Following the presentation, the workshop will provide activities for community members to offer ideas and priorities and shape the emerging standards. Activities may include but are not limited to live visual preference surveys, interactive stations with presentation boards, and small-group facilitated discussions with tabletop materials. While the format will be developed in coordination with Town staff, the interactive portion of the workshop will be designed to prompt community members to:
 - *Identify and discuss* key elements that contribute to Los Gatos' neighborhood character.
 - *Visualize and articulate* priorities for a range of building and site design elements with a focus on architectural style, building height transitions between different residential densities and districts, and details of building design.
 - *Ask questions about and lend input* into the emerging standards to ensure that the Project is truly a community-led effort.

After the workshop, the consulting team will summarize the feedback collected from all participants and identify ideas to be incorporated into the Updated/Additional Objective Design Standards.

Task 3: Administrative Draft Updated/Additional Objective Design Standards

A. Working Meetings with Town Staff (2). The consulting team will participate in two one-hour working meetings with Town staff during the development of the Administrative Draft. LWC will provide a summary memo for each meeting.

B. Administrative Draft Updated/Additional Objective Design Standards. The consulting team will prepare the Administrative Draft Updated/Additional Objective Design Standards to satisfy the State's requirements in accordance with SB330 as well as the community's design priorities. While the scope and nature of the amendments will be determined through Tasks 1 and 2, the consulting team anticipates the Standards will include the following:

- **Site Standards.** Edits and additions to existing standards to support high-quality site design of small-scale multi-family development types, including common and private open space, bicycle parking, vehicular parking, landscaping.
- **Building Standards.** Edits and additions to existing standards to require high-quality building design that demonstrates the Los Gatos character. This includes edits and additions to existing standards for massing and scale; parking structure design; roof design; façade design and articulation, and other design elements. In developing this material, the consultant team will focus on:
 - *High-quality building design* – Building design (form, massing, materials, and details) that is high in quality and that reflects the Town's character, detailed in an objective manner.
 - *Architectural style* – Styles that are typical of the Town, both within and outside of the historic Downtown, and the hallmarks of each style, described as objective features.
 - *Height transitions* – Strategies for appropriate massing transitions between different zones and residential densities, and how such transitions may impact solar access.
- **Anticipating Density Bonus.** Edits and additions to the standards to ensure that key community priorities are preserved when concessions are granted to density bonus projects.

- **Updated and new graphics/illustrations.** Updated and new figures and illustrations that accurately reflect the scale and character of Los Gatos and that represent the range of forms and scales of residential and residential mixed-use development in the Town and that can be used to clearly illustrate the standards. The graphics will be developed using a combination of SketchUp and Adobe Illustrator.
- **Implementation.** Edits and additions to existing checklist review process to ensure application of the standards is predictable, clear, and easy to follow. The consulting team will also identify places elsewhere in the Town's regulatory framework that may need to be updated for consistency with the Updated/Additional Objective Design Standards and to ensure predictable and streamlined ministerial review.

Task 4: Public Review Updated/Additional Objective Design Standards

A. Working Meetings with Town Staff (2). The consulting team will participate in two one-hour working meetings with Town staff during the development of the Public Review Draft. LWC will provide a summary memo for each meeting.

B. Public Review Draft Objective Design Standards. The consulting team will prepare a Public Review Draft based on a single set of consolidated, non-conflicting comments from the Town staff review of the Administrative Draft.

Task 5: Review and Adoption

A. Planning Commission Public Hearing. LWC will prepare materials/presentations for, and present at one in-person Planning Commission public hearing to support adoption of the Updated/Additional Objective Design Standards.

B. Town Council Public Hearing. LWC will prepare materials/presentations for, and present at one in-person Town Council public hearing to support adoption of the Updated/Additional Objective Design Standards.

C. Final Objective Design Standards. Based on the Town Council's final adoption and final text changes provided by Town staff, LWC will prepare, and provide in Word and PDF, the final Objective Design Standards.

Optional Tasks

A. Additional Focus Group Meetings. The consulting team will hold additional focus group meetings similar in format to those described in Task 2B, to be held at any point in the process. Discussion topics will be developed in coordination with Town Staff.

B. Educational Story Map/Survey. Using ArcGIS Online, the UPP team will develop a Story Map that provides an overview of objective design standards, showcases existing and proposed multi-family and mixed-use residential development in the Town, and collects feedback from users. UPP will analyze this feedback and work with LWC to incorporate it into the draft objective design standards.

C. Test Site Feasibility Analysis/Proforma. LWC will prepare a financial feasibility analysis for selected sites or building prototypes identified in the ODS drafting process. The goal is to ensure that development standards result in economically feasible conditions that will allow for projects to be developed. This analysis will also establish that the ODS do not serve as a constraint on housing production. LWC will develop a financial model (static developer-side pro forma) based on the proposed standards. The definition of potential building envelopes and development standards can be prepared concurrently to establish the economic feasibility of the proposed standards as they are being formulated.

D. Community Open House on the Public Review Draft. The consulting team will hold an in-person Open House to present the Public Review Draft Updated/Additional Objective Design Standards to the community and gather the community's feedback and input. The input gathered from the Open House will be reflected in the subsequent draft of the design standards.

E. Planning Commission/Town Council Study Session. LWC will prepare materials/presentations for, and present at a Planning Commission or Town Council study session on the Public Review Draft updated/Additional Objective Design Standards.

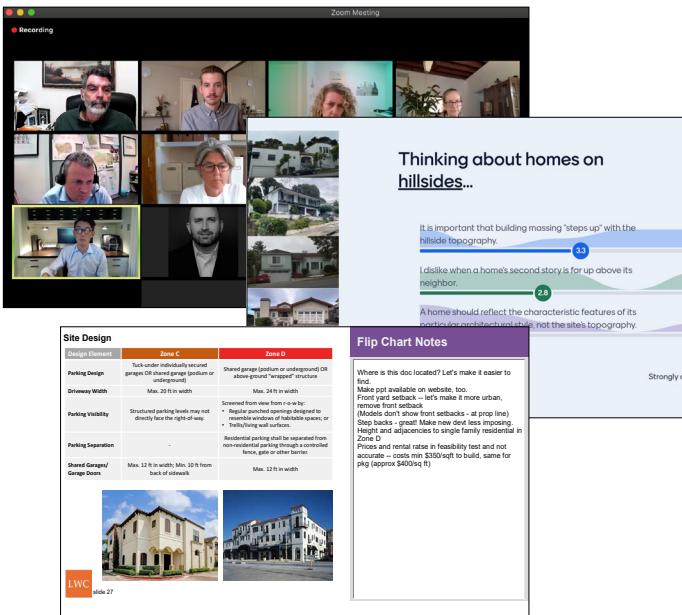
F. Additional Planning Commission/Town Council Hearing. LWC will prepare materials/presentations for, and present at a Planning Commission and Town Council Hearing study session on the Public Review Draft Updated/Additional Objective Design Standards.



LWC prepares for a community workshop on the Hayward Downtown Specific Plan.



LWC staff leads a visual preference exercise at a Livermore General Plan Amendments community event.



LWC staff leads virtual workshops using a range of interactive tools such as break-out discussion rooms, and live polling, and virtual white boards.

Assumptions

This proposal is based on the following assumptions:

1. *All meetings and calls will be conducted using an online video conferencing platform unless specified as in-person.*
2. *All deliverables, except for presentation materials required for the public workshop and open house, will be provided in electronic format.*
3. *Town staff will be responsible for the preparation and publishing of all required public hearing notices, property owner notification, newspaper notices, agendas and staff reports for public hearings, and translations or interpretation services.*
4. *Town staff will provide comments on draft materials as a single set of non-conflicting and actionable comments. The Town's comments will include those from the Town Attorney as appropriate as determined by Town staff. Town Attorney comments will be compiled with Town staff comments when provided.*
5. *Town staff will prepare staff reports, resolutions, and notices for the Planning Commission and Town Council meetings and hearings.*
6. *The Project involves no CEQA review, documentation, or noticing.*

The proposal acknowledges laws and statutes enacted at the time of its writing. The parties will agree on amendments to the scope of services that become necessary if any changes occur to applicable rulings and obligations that were unexpected at the time of the execution of this proposal.

EXPERIENCE AND EXPERTISE

LWC

Lisa Wise Consulting, Inc.

LWC was founded in 2006 and has grown to a staff of 21 urban planning professionals and support staff with offices in Los Angeles, San Francisco, and San Luis Obispo. LWC specializes in assessing, updating, and modernizing zoning codes aimed at promoting pedestrian and transit-oriented communities, and facilitating sustainable, vibrant places to live, work, and play. The LWC team addresses each engagement with a deep understanding of zoning principles and best practices, strong project management, writing, and graphics production.

Core Services. Since 2006, LWC has been dedicated to working with California cities to assure compliance with State Housing Law and consistency and clarity of zoning codes. This is a target project for LWC. Our core services include:

- Zoning Ordinances, Development Codes, Form-Based Codes, and Design Standards and Guidelines
- Long-Range Planning, Specific Plans, TOD Plans, and Corridor Plans
- Housing Elements and Affordable Housing Policy
- Financial Feasibility, Market Analyses, and Revitalization Strategies

Close Communication and Data-Driven Management.

Our approach relies on close collaboration with clients through regularly scheduled calls and meetings, regular progress reports, and fast



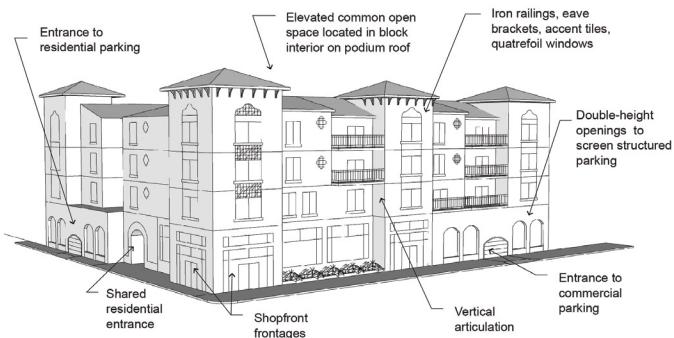
and thorough turnaround on all document review and communication. Our operations are supported by BigTime, a performance management software LWC employs to track project progress by task and team

member in real time. This enables the LWC team to anticipate and adjust for issues before they occur and keep the project on schedule and on budget.

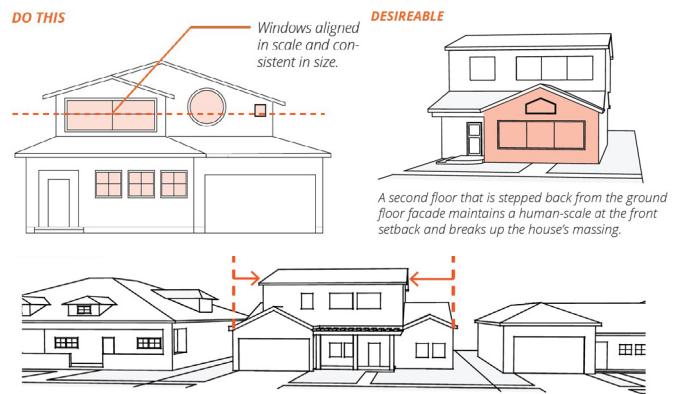
Targeted Experience. LWC has led over 100 zoning code engagements and 15 successful Housing Element Updates in this 6th Cycle. LWC has developed produced Objective Design Standards and prepared related Zoning Amendments for the following jurisdictions:

- City of Beaumont (Riverside County)
- City of Long Beach (Los Angeles County)
- City of Los Altos (Santa Clara County)
- Marin County
- City of Millbrae (San Mateo County)
- City of Piedmont (Alameda County)
- Town of Portola Valley (San Mateo County)
- City of Rancho Cucamonga (San Bernardino County)
- City of Saratoga (Santa Clara County)
- City of Seal Beach (Orange County)
- City of South San Francisco (San Mateo County)
- City of Woodland (Yolo County)

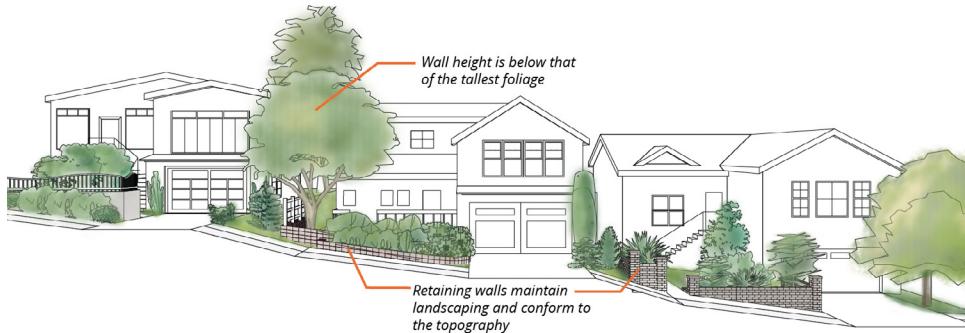




LWC tested out the objective design standards on a key Housing Element opportunity site in Piedmont, CA.



The Redwood City Residential Design Guide provides guidance on a range of architectural elements.



Landscaping is an integral part of the neighborhood streetscape.

As a firm, we are dedicated to the following principles on all of our engagements:



Equity. Ensures that the benefits and burdens of the new code are shared across the community, expand opportunities for affordable housing and affordable commercial space, and support a diversity of businesses.



Viability. Fosters development that supports housing, employment growth, vibrant commercial centers and business districts while considering market forces, economic feasibility and fiscal performance.



Quality. Assures standard of excellence that retains value, is long lasting, and responds to context and character of neighborhoods, corridors, and districts.



Context. Responds and enhances to the unique character of neighborhoods, corridors, centers, and districts.



Predictability. Offers a high degree of control and assures alignment with expectations of development outcomes for the City, property owners, businesses, and the development community.



Flexibility. Able to accommodate reasonable adjustments to assure positive outcomes and community compatibility over time.



Clarity. Be easy to understand for community members, developers, and City officials and staff, and enable consistent interpretation at the planning counter.

LWC

CITY OF LOS ALTOS

Objective Design Standards for Multi-family and Residential Mixed Use Development

STATUS:

Adopted September 2021

TIMEFRAME:

May 2020 – September 2021

BUDGET:

\$341,750

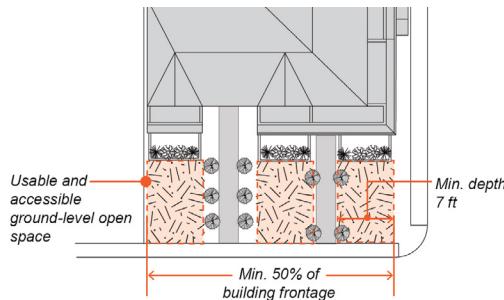
REFERENCE:

Guido F. Persicone, MUP, AICP
 Planning Services Director
 City of Los Altos (**Former**)
 Community Development Director
(Current)
 City of Marina
 211 Hillcrest Ave.
 Marina, CA 93933
 (831) 884-1281
gpersicone@cityofmarina.org

PARTNERS:

Opticos Design, Inc.
 W-Trans

LWC also updated the Los Altos 6th Cycle Housing Element, which was adopted by City Council on January 24, 2023 and certified by the HCD in September 2023.



LWC was hired by the City of Los Altos to develop design standards for the City's Zoning Code to be compliant and consistent with State laws SB2, SB35, SB330, and AB1485, and facilitate the production of safe, attractive and diverse housing.

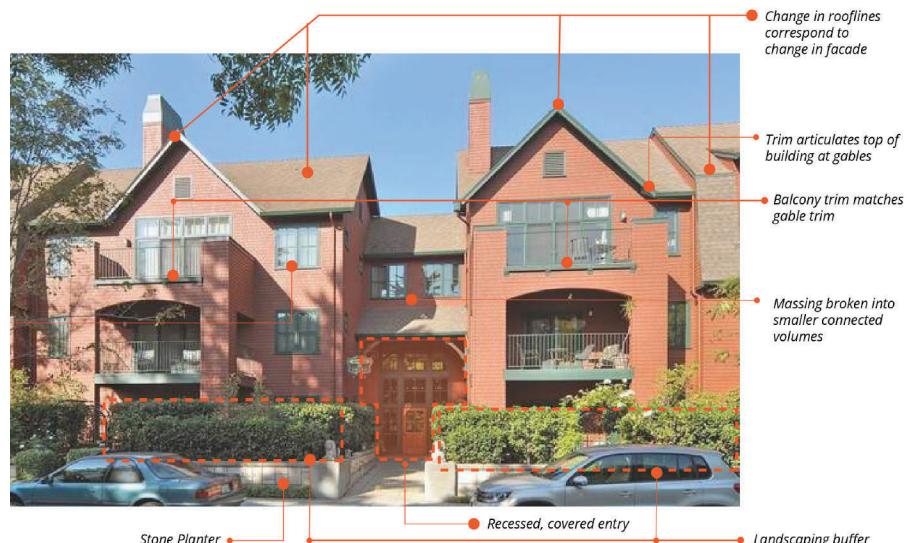
LWC implemented the project with an outreach campaign grounded in interviews with City staff, City Council members, Planning Commissioners, developers, architects, and property and business owners. Outreach also included a series of Joint Planning Commission/City Council Study Sessions.

Armed with feedback from the community, LWC conducted a thorough review and evaluation of existing standards, criteria,

and guidelines for multifamily and residential mixed-use development, focusing on existing subjective design standards. LWC also conducted a micro-scale analysis of built form in the key areas as well as lot testing on sample sites.

Based on the findings of the analysis and input from City leadership, LWC drafted and illustrated a set of objective design standards for all 11 zoning districts that support multi-family or residential mixed-use development. The standards ensure that criteria for approval are clear, objective, and lead to predictable high-quality results that reflect the City's unique character.

The City Council adopted the Objective Design Standards in September of 2021.



Micro-scale analysis of a downtown residential district

LWC

CITY OF MILLBRAE

Citywide Objective Design Standards and Zoning Code Amendments

STATUS

Anticipated adoption
November 2025

TIMEFRAME

December 2023 –
November 2025

BUDGET

\$513,202

REFERENCE:

Roscoe Mata
Planning Manager
City of Millbrae
621 Magnolia Avenue
Millbrae, CA 94030
(650) 259-2416
Rmata@ci.millbrae.ca.us

LWC was hired by the City of Millbrae to develop objective residential design standards that ensure consistency and compliance with State laws including SB 330, SB 6, AB 2011, and laws related to Accessory Dwelling Units (ADUs). The project's goals are to establish standards for the design of single-family residential development, duplexes, triplexes, ADUs, multi-family, and mixed-use developments; and to introduce a new residential design review process aimed at facilitating residential permitting.

To ensure the community's voice is evident in the updated Zoning Code, LWC has worked closely with City staff to facilitate study sessions with the City Council, Planning Commission, and Community Enhancement Advisory Committee; a Community Workshop;

a Community Open House; an online Community Survey; and social media posts to gather community input on design preferences and priorities. LWC has also designed and hosts a project website (www.millbraeresidentialdesign.org).

Based on a thorough review and analysis of existing residential design, a review of existing policies and standards, and input from the community and decision-making bodies, LWC is drafting design standards that are clear, visually engaging, user-friendly, and will lead to predictable high-quality and context-sensitive design.

Anticipated adoption of the Citywide Objective Design Standards and Zoning Code Amendments is November 2025.

Figure 4-1: Characteristic Design Elements of Millbrae Single-family, Duplex and Triplex Development



LWC

CITY OF PIEDMONT

Multifamily and Mixed Use Objective Design Standards, Proformas, and Prototype Plans and Incentives for Accessory Dwelling Units

STATUS:

Adopted September 2023

TIMEFRAME:
September 2020 –
September 2023
BUDGET:

\$159,930

REFERENCE:

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

PARTNERS:

Open Scope Studio
Plan to Place

LWC also updated the Piedmont 6th Cycle Housing Element. The Housing Element was adopted by City Council on March 20, 2023 and was certified by the HCD in October 2023.

In 2020, the City of Piedmont hired LWC to create Objective Design Standards for mixed-use and multi-family development, conduct site and feasibility testing, develop strategies to aid the City in affirmatively furthering fair housing consistent with AB 686, and provide incentives for ADUs. The project aimed at accelerating housing production by streamlining the development review process while assuring the community's support for the design, quality, and placement of new units.

Piedmont values its beautiful neighborhoods, generous park space, and small-town charm. The community is also aware of its unique constraints: almost 70 percent of Piedmont is designated for single-family residential and only 0.3 percent for multi-family residential. Vacant land accounts for less than two percent of the land area.

A critical feature of the project is outreach, education, and community participation. As such, LWC led a

robust community engagement effort which featured stakeholder interviews, community workshop, two workshops with the Housing Advisory Committee, and a community-wide Fair Housing Survey that garnered over 800 responses.

LWC worked closely with City staff and the community to assess the City's existing subjective guidelines, analyze housing opportunity sites, test the existing development standards on two development sites, and ensure the community's design preferences are reflected in the new development standards.

LWC also conducted a financial feasibility analysis for the two development sites using 3D models and proforma analysis. LWC assured the ODS would be financially feasible and would lead to outcomes supported by the community.

The standards were adopted by City Council in September 2023.

Piedmont is Home

Part 4: Thinking About Design

Residential Mixed-Use

Residential Mixed-Use Example 3 (89 du/ac)

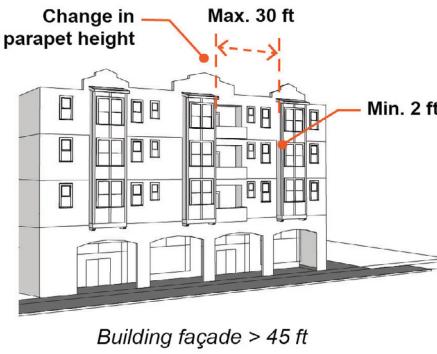
Image Credit: Kirk E. Peterson & Associates Architects

Image Credit: Kirk E. Peterson & Associates Architects

* 36. How appealing do you consider the design of the development shown in the image? 5 – Very appealing 4 – Somewhat appealing 3 – Neither appealing nor unappealing 2 – Somewhat unappealing 1 – Very unappealing

* 37. What characteristics make the design of the development appealing to you? (Mark all that apply.)

Building setback (distance between the building and the roadway)
 Location and configuration of parking
 Building access (location and orientation of driveways and front entry)
 Building height
 Variation of wall surfaces, recessed windows/ doors, balconies, etc.
 Landscaping and plantings
 Area between the building and sidewalk (how inviting or comfortable is it)
 Relationship of the building with neighboring structures
 None (I don't find it appealing)
 Other (please specify)





CITY OF REDWOOD CITY

Citywide Residential Design Guide

STATUS:

Approved July 2021

TIMEFRAME:

June 2019 - July 2021

BUDGET:

\$183,580

REFERENCE:

William Chui
Associate Planner
City of Redwood City
1017 Middlefield Road
Redwood City, CA 94063
(650) 780-5916
wchui@redwoodcity.org

LWC was hired by Redwood City to create the City's first Residential Design Guide. The Citywide Residential Design Guide was initiated in 2019 to address concerns regarding design, massing, scale, and proportions of single-family homes in relation to neighborhood context.

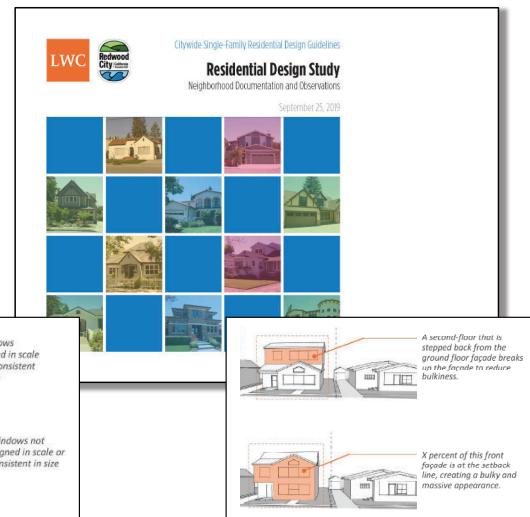
The Guide applies to all residential design in the city with particular emphasis on single-family homes. The Guide also provides criteria for the evaluation of projects that require either staff-level or hearing-level review. These include second-story additions, modifications to a second story, new single-family two-story structures; single-family projects that exceed 3,000 square feet or an FAR of 0.45; and additions to homes on lots with an average slope of 15 percent or more.

LWC worked closely with City staff on an extensive outreach program to determine the community's

preferences, priorities, and concerns about single-family residential design. The community outreach process included a project website, FAQ sheet, project postcards, initial information gathering sessions with key stakeholders, a Pinterest page, interactive Walk-shops specific to each Redwood City neighborhood, two online surveys, an Open House, two Community Workshops, and a table at a community Farmers' Market.

In addition to the Design Guides, LWC recommended Zoning Code amendments, including modifications to single-family development standards, Zoning Administrator Permit findings, and procedural changes for project noticing and approval.

The passage of SB330 during the project led the City to approve the Design Guide for a 1-year pilot program, after which time the City would determine how to update them as objective standards.



LWC

CITY OF SARATOGA

Objective Design Standards

STATUS:

Adopted

TIMEFRAME:September 2022 –
October 2023**BUDGET:**

\$159,511

REFERENCE:

Christopher Riordan
Senior Planner
City of Saratoga
13777 Fruitvale Avenue
Saratoga, CA 95070
(408) 868-1235
criordan@saratoga.ca.us

The City of Saratoga hired LWC to implement their 6th Cycle Housing Element, develop Objective Design Standards, and achieve the City's goals of compliance with state law while maintaining small-town character and a high quality of life for its residents.

LWC initiated the project with a review of recent development projects, evaluation of context and design characteristics of the proposed housing opportunity areas as well as policy direction from the General Plan, guidance and policy direction from Specific Plans and Design Guidelines.

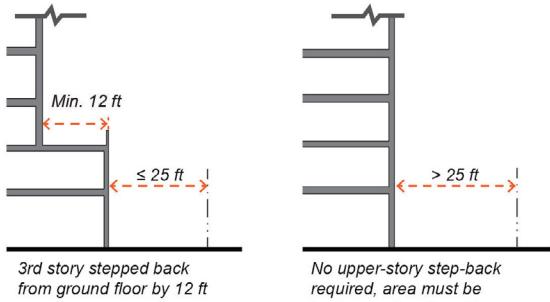
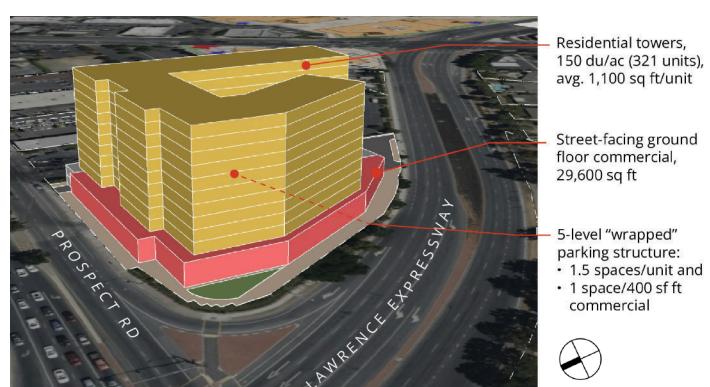
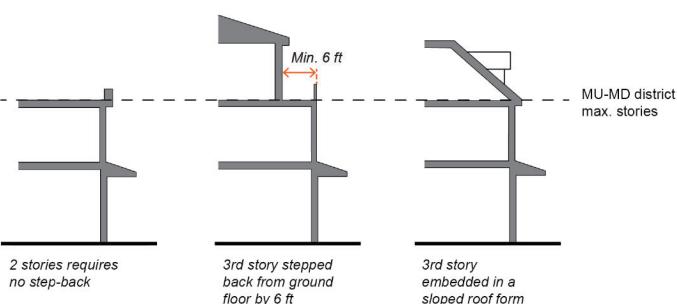
Using 3D modeling software, LWC tested the proposed standards for the new residential mixed-use zones on specific housing opportunity sites to confirm that

the standards would be feasible and meet City goals.

Based on the findings of the analysis and input from meetings with City staff, LWC drafted and illustrated new Objective Design Standards for the opportunity sites to be re-zoned to support multi-family or residential mixed-use development.

The new standards satisfy the State's requirements for Objective Design Standards in accordance with SB330. LWC also provided direction on corresponding updates to the Zoning Code.

The Objective Design Standards were adopted by the City Council in October 2023.

Upper Story Front Step-Back, MU-VHD District:**Upper Story Step-Back, MU-MD District:**

URBAN
PLANNING
PARTNERS
INC.

Urban Planning Partners, Inc.

Urban Planning Partners (UPP) is a land use planning firm that was established in 2009. We are a small firm located in Downtown Oakland and 100-percent woman-owned.

The firm is led by Lynette Dias, UPP's Founder and President. Lynette has over 30 years of urban and environmental planning experience. She began her career in the public sector in northern and southern California cities, and later transitioned into consulting, where she spent the majority of her career working for public agencies and private developers throughout California.

Our Mission and Values

Our mission is to help create better places in partnership with our clients and the communities in which we work. Our core values are:

- **We care.** We have called the Bay Area home since our founding and love playing a part in shaping some of our favorite places. We take on projects that stir something in us, and it shows.
- **We collaborate.** Projects are stronger when the development process is collaborative. Whether it's working with one another, our subconsultants, or our clients, we believe in joining forces.
- **We reach.** The potential for what we can do, not relying on what we've always done, is what motivates us. Reaching up and preaching out keeps our work innovative, our team engaged, and our approach inclusive.
- **We are real.** We pride ourselves on telling it like it is. Our clients can count on us for honest, practical guidance.

Our key services include planning policy, development services, community engagement, environmental review, contract planning, and grant writing. Trust, objectivity, and insight are the foundations of our work. Our dedication, strong communication skills, and diverse range of experience enable successful partnerships with our clients. We collaborate with our clients and

the communities in which we work to achieve approval and implementation of policies and projects that better urban environments.

Community Engagement

At UPP, we believe that objective design standards function best when they are developed in collaboration with community members who know their community best and key stakeholders who have a detailed understanding of the development process.

UPP has lead outreach and engagement efforts related to objective design standards in several communities including Santa Cruz, Foster City, and San Jose. Our experience working on these projects has taught us the importance of getting to know the communities we serve, taking part in active listening, being transparent, and providing ample opportunities for the community to learn about the project and provide input.

In Santa Cruz, the UPP team led a robust outreach campaign to develop standards that represented the community. UPP collected feedback from a diverse group of community members and stakeholders via an online survey, tabling events, community workshops, focus group meetings, and a planning commission study session. UPP used this feedback to draft objective design standards that balance a variety of needs and perspectives. Because the UPP team worked with the community to develop objective design standards, the standards earned broad support and were unanimously adopted by the City Council.

In Foster City, UPP used a different approach to encourage community ownership of objective development standards. Here, UPP designed a "Data Walk" activity that guided community members through the design of ten housing projects in Foster City and asked them to provide feedback on their experience of those projects. UPP worked to identify common themes among the feedback collected, including which features and characteristics were most positively/negatively perceived. Based on our findings, our team drafted objective design standards that were most likely to be positively perceived while still remaining feasible, satisfying legal requirements, and aligning with housing development targets.



RELATED PROJECT EXAMPLES AND REFERENCES

SANTA CRUZ MULTI-FAMILY DEVELOPMENT OBJECTIVE DEVELOPMENT STANDARDS AND COMMUNITY ENGAGEMENT

CITY OF SANTA CRUZ

Designing a Santa Cruz for All:
The Past and Future of Housing Policy

Cómo diseñar un Santa Cruz para todos:
El pasado y futuro de las políticas de vivienda

WITH GUEST SPEAKERS | CON PONENTES INVITADAS

Gretchen Regenhardt, California Rural Legal Assistance | Asistencia legal rural de California
Diana Alfaro, MidPen Housing Corporation | Corporación de Vivienda MidPen
Nane Alejandro, Barrios Unidos (Spanish event only) | Barrios Unidos (Sólo en el evento en español)

The City of Santa Cruz invites you to learn about the history of housing policy, and the upcoming steps we are taking to fill in the gaps left by those policies. This discussion will prepare you to provide input on the Multi-Family Development Standards Update Project. Attend for a chance to win prizes worth up to \$100!

La Ciudad de Santa Cruz te invita a informarte sobre la historia de las políticas de vivienda y las próximas pasos que estamos dando para llenar los brechas que esas políticas dejaron. Esta conversación lo preparará para dar su opinión sobre el Proyecto de Actualización de Estándares de Desarrollo Multifamiliar (Multi-Family Development Standards Update Project). ¡Asistir para tener la oportunidad de ganar premios por valor de hasta \$ 100!

English Language | March 11, 2021 | 7:00 to 8:00 PM
Idioma español | 24 de marzo de 2021 | De 7:00 p. m. a 8:00 p. m.

Find the meeting link at | Para más información, vaya a: <https://www.cityofsantacruz.com/Home/Components/Topic/Topic/11282/3916>

Event recordings will be made available on the project website | Las grabaciones de los eventos estarán disponibles en el sitio web del proyecto.

UPP worked with the City of Santa Cruz to develop objective development standards for multi-family development per State laws SB 35 and the Housing Accountability Act. Given previous misinformation and community resistance to multi-family development, the UPP team (in partnership with InterEthnica) developed and carried out an equity-focused engagement approach to reach communities not typically involved with the planning process including the Latinx community, low- and moderate-income households, and university students. Through targeted engagement and candid discussions with stakeholders, the team facilitated meaningful dialogue that shaped development standards that are economically feasible for developers and representative of community priorities and values.

The team presented the community engagement strategy to the Planning Commission, where they heard

unanimous support. In addition to community engagement, the objective standards are informed by robust analysis. UPP led a team of technical subconsultants with economic, transportation, and urban design expertise to ensure the development standards are feasible. UPP, with help from Kristen Hall City Design and Strategic Economics, completed test fits and proforma analyses to identify barriers to development that could be addressed with the objective development standards. The standards were approved by the Santa Cruz City Council on November 15, 2022. Following adoption of the Objective Development Standards, UPP assisted the City in developing an Objective Development Checklist for both applicant and internal use to implement the standards.

Client Contact

Sarah Neuse, Senior Planner – Advanced Planning
City of Santa Cruz
831.420.5092
sneuse@cityofsantacruz.com



FOSTER CITY OBJECTIVE MULTI-FAMILY AND MIXED-USE DESIGN STANDARDS

CITY OF FOSTER CITY

Objective design standards often require the use of industry best practices and technical terms to translate personal experiences of a place (e.g., “community character”) into quantifiable measures. As a result, these standards can be challenging for community members and decisions-makers to envision – or for planning professionals to articulate.

UPP and Van Meter Williams Pollack teamed up to work with Foster City to develop objective design standards for multi-family and mixed-use developments. The standards address site development, buildings, and landscape and Foster City’s unique waterfront setting.

To help frame this conversation, UPP designed a “Data Walk” activity that guided community members through the design of ten housing projects in Foster City and asked them to provide feedback on their experience of those projects. Stakeholders could participate physically (by scanning QR codes at each location) or digitally (by interactive map), at their own pace. Each stop included a short video explaining key design features and prompting participants with open-ended questions. Participants could then send texts, take a survey, or fill out a physical handout to respond to the questions. The project included preparing objective design standards in a new chapter of the City’s zoning regulations, related zoning regulation amendments in numerous other chapters, checklist for developers, and a users’ guide with additional photos and graphics to explain the standards.

Client Contact

Sofia Mangalam, Community Development Director
 City of Foster City
 650.286.3239
 smangalam@fostercity.org





IRVINGTON BART STATION SITE PLAN, STATION AREA PLAN, AND ENVIRONMENTAL REVIEW BART AND THE CITY OF FREMONT

UPP led a team of consultants on the development of a Station Site Plan and Station Area Plan for the new Irvington BART Station. Working with a large team and two different clients on a controversial project required a proactive project management approach and robust community outreach.

Leading the development of the Station Area Plan, UPP worked with Urban Field Studio to guide future development in the area surrounding Irvington Station and stitch the new station into the existing community. We prioritized crafting a Station Area Plan that is useful and easily readable for planners and developers and that includes objective development standards.



The outreach strategy for Irvington BART Project included message development, targeted stakeholder engagement, and public outreach. Targeted stakeholder outreach included focus groups with the Irvington Business Association, Washington Township Historical Society, and property owners and developers with property interests near the station. Involving these groups early in the planning process in a transparent and collaborative manner allowed the project team to gain a diverse group of supportive stakeholders. UPP also organized and led classroom presentations to approximately 150 students at Irvington High School, spoke to over 100 people while tabling at the Irvington Farmer's Market, developed multiple online surveys, and led large community workshops that attracted over 100 participants.

UPP also led the streamlined environmental review process to clear the Irvington Station which consisted of an addendum to the 1991 Warm Springs BART Extension EIR and 2003 Warm Springs Extension Supplemental EIR. Completion of this project has achieved the City of Fremont's longstanding vision of a transit-oriented, active area, strategically integrated with the future Irvington BART Station; consistent with the City's 2011 General Plan and Irvington Community Plan goals.

Client Contact

Kristie Wheeler, Interim Assistant Community Development Director (former Fremont Planning Manager)
City of Dublin
925.833.6610
kristie.wheeler@dublin.ca.gov

QUALIFICATIONS OF KEY PERSONNEL

Lisa Wise Consulting, Inc.

LWC's approach for the Objective Design Standards Project will rely on our team's expertise in California Housing Law, best practices for Zoning Code audits and updates, and our experience on similar projects. The LWC Team assigned to this Project brings decades of relevant practice and understanding:

Lisa Wise, AICP (Principal) has over 30 years of professional Project Management experience leading housing element updates in the 4th, 5th and 6th cycles as well as zoning code audits and updates throughout California and the U.S. as well as large-scale code engagements in the Middle East.

David Bergman (Director) brings over 25 years of experience in California Housing law and zoning regulation. David was the LWC Project Manager for 6th Cycle Housing Element Updates, Inclusionary Housing Ordinances and Density Bonus programs in Long Beach, Alameda County and Novato and has served as the Director of Planning and Building in the City of South Pasadena.

Monica Szydlik, AICP (Project Manager) brings over 18 years of project management, zoning code and community design experience. Monica holds a Master's degree in architecture and has led objective design standards and design guidelines projects in Piedmont, Los Altos, Woodland, South San Francisco, Saratoga, Portola Valley, Redwood City, and Seal Beach.

Stefano Richichi (Senior Associate) has over nine years of zoning code and community development experience. He supports the LWC team in comprehensive code review, assessment, and strategies to ensure more user-friendly, streamlined, modern development regulations that implement the community's vision.

Caroline Chen (Associate) brings nearly four years of graphics, design and long-range planning experience and will support the team with comprehensive research and developing drafts and editing deliverables.

Urban Planning Partners, Inc.

The UPP team bring extensive expertise in community development, and land use and policy planning. The UPP Team assigned to this Project brings the following qualifications and experience:

Curtis Banks, AICP (Principal-in-Charge) has over 30 years of experience in planning and community development, including affordable housing, building, and code enforcement. Curtis has managed a wide variety of residential and non-residential projects, coordinating all facets of the project from the beginning of the planning and environmental review process through construction. Curtis has spent his entire career working for communities in Santa Clara and San Mateo counties (including as consultant to Los Gatos). Curtis is currently overseeing projects in Saratoga and Newark.

Carla Violet (Project Manager) has over 10 years of experience managing land use and policy planning, environmental review, and community engagement projects customized to address specific project objectives, anticipated challenges and opportunities, and community concerns. She is skilled at effectively evolving community engagement strategies to ensure responsiveness to project issues that arise during the planning process and to ensure an appropriately representative cross-section of the community and/or stakeholders are engaged. Carla serves as the East Bay Community Relationship Manager for the Link 21 Program which aims to expand BART and other rail systems by adding another transbay crossing between Oakland and San Francisco.

Grant Sles (Project Planner) has nearly five years of experience in urban planning and has worked in both the public and private sector. His main areas of expertise are housing policy, community engagement, climate resilience, and environmental justice. He has played a key role in developing general plan elements and specific plans throughout the West Coast and implemented affordable housing programs at the County of Ventura.

LISA WISE, AICP

President, CEO

LWC

As a certified planner and public accountant, Lisa has over 30 years of professional experience in housing policy, land use regulation, real estate finance, and the management of complex projects. 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 aimed at accelerating housing production and complying with State housing law. These include 35 housing elements in the 4th, 5th, and 6th Cycles as well as Fair Housing Assessments, Inclusionary Housing Ordinances, Objective Design Standards, and Density Bonus Programs. She has also overseen over 23 master and specific plans, 80 zoning code audits and updates and 35 economic and financial feasibility engagements.

SELECT RELEVANT PROJECT EXPERIENCE:

- Arroyo Grande, CA | Housing Element Update, 4th and 5th Cycle
- Austin, TX | Citywide Code Update
- 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
- Columbus, OH, Code Assessment and Code and Zoning Map Update
- Flagstaff, AZ | Zoning Ordinance Update
- Grover Beach, CA | Zoning Code Update, West Grand Avenue Masterplan, and 4th Cycle Housing Element Update
- Hayward, CA | Downtown Specific Plan and Code Update
- King City, CA | Housing Element, 4th Cycle
- Livermore, CA | Development Code Update and 5th Cycle Housing Element Update
- Long Beach, CA | 6th Cycle Housing Element Update
- Long Beach, CA | SB9 Ordinance and ADU Ordinance
- Loomis, CA | Housing Element Update 3rd, 4th and 5th Cycle
- Malibu, CA | Zoning Code and Local Implementation Plan Update
- Merced, CA | Bellevue Corridor Plan
- Mesa, AZ | Form-Based Code and Regulating Plan
- Petaluma, CA | SMART Rail Station Areas: TOD Master Plan
- Pismo Beach, CA | Housing Element, 4th Cycle
- Richmond, CA | Livable Corridors Plan, South Shore Specific Plan, and 4th and 5th Cycle Housing Element Update, Fair Housing Ordinance Evaluation and Update
- Saratoga, CA | Mixed Use Multifamily Objective Design Standards
- Tehachapi, CA | Housing Element Update 4th and 5th Cycle
- Vallejo, CA | Housing Element Update 5th Cycle
- Woodland, CA, 6th Cycle Housing Element Update
- Woodland, CA | Comprehensive Code Update



PAST WORK EXPERIENCE

- California Polytechnic State University
Adjunct Faculty | San Luis Obispo, CA | 2002 - Present
- Crawford, Multari & Clark Associates
Professional Consultant | San Luis Obispo, CA
2001 – 2006
- Governor's Office of Planning & Research (OPR)
Intern | Sacramento, CA | 1999 – 2000
- PricewaterhouseCoopers, LLP
Financial Services Manager | New York, NY
1990 – 1999

EDUCATION

- California Polytechnic State University
Master of City & Regional Planning | San Luis Obispo, CA
- DePaul University
M.S., Accountancy | Chicago, IL
- University of Cincinnati
B.S., Business Administration in Marketing & Finance

CERTIFICATIONS & MEMBERSHIPS

- American Planning Association (APA)
American Institute of Certified Planners (AICP)
- California Planning Foundation
Treasurer, 2019 – Present
- Dean's Leadership Council
California Polytechnic State University, College of
Architecture & Environmental Design, 2018 – Present
- Congress for the New Urbanism (CNU)
Paul Crawford Award for Excellence in Planning, 2017
- Form-Based Code Institute (FBCI)
Chair, 2015 – 2018 | Treasurer, 2014 – 2015
- Certified Public Accountant, 1991 – 1999

DAVID BERGMAN

Director

LWC

With over 25 years of experience, David has focused on housing regulation, financial feasibility analysis, and urban planning projects, with an emphasis on the formation and implementation of local and regional development strategies. He 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 successfully led 6th Cycle Housing Element Updates in Long Beach, Novato, and Alameda County among others.

RELEVANT PROJECT EXPERIENCE:

- Alameda County, CA | 6th Cycle Housing Element Update
- Artesia, CA | Mixed-Use Overlay Zone Analysis and Recommendations
- Beverly Hills, CA | Economic Sustainability Plan Update
- Citrus Heights, CA | Housing Prototype Testing
- Cypress, CA | Inclusionary Housing Feasibility Study
- Folsom, CA | Financial Feasibility Analysis for Residential and Mixed Use
- Long Beach, CA | 6th Cycle Housing Element Update
- Long Beach, CA | SB9 and ADU Ordinance
- Lompoc, CA | Housing Market Analysis
- Modesto, CA | Financial Feasibility Analysis for Residential and Mixed Use
- Novato, CA | 6th Cycle Housing Element Update, Rezoning Program, and Inclusionary Housing Ordinance
- Portola Valley, CA | Conceptual Site Plans, Zoning Code Amendments, and Objective Design Standards
- Rancho Cucamonga, CA | Economic Development Strategic Plan
- San Diego, CA | Barrio Logan Affordable Housing Strategy
- San Fernando, CA | Workforce Housing Analysis
- San Gabriel, CA | Inclusionary Housing Ordinance
- Santa Maria, CA | 6th Cycle Housing Element Update and Market Analysis
- Santa Rosa, CA | Jobs Housing Balance Study
- Seal Beach, CA | 6th Cycle Housing Element Update
- St. Helena, CA | Inclusionary Housing Ordinance
- Sun Cal, Anaheim, CA | Inclusionary Housing Strategy, Palatium Triangle
- Tehachapi, CA | 6th Cycle Housing Element Update
- Woodland, CA | Financial Feasibility Analysis for Residential and Mixed Use



PAST WORK EXPERIENCE

Metropolitan Research and Economics
Principal, Director, and Owner | Santa Monica, CA
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
Principal | Los Angeles, CA
1996 - 2009

EDUCATION

University of California
M. of Planning Geography | Los Angeles, CA

University of Wisconsin
B.A., Geography and Classical History | Madison, WI

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

MONICA SZYDLIK, AICP

Senior Associate

LWC

Monica brings over 18 years' experience in planning and urban design to LWC. She has focused her career on leading specific plans, transit-oriented development plans, streetscape design, design guidelines, form-based development regulations, and zoning code updates. Her skills include managing multi-disciplinary teams, meticulous attention to detail, deep understanding of land use regulations, facilitating community outreach, and delivering projects on time and within budget. Monica is an expert in integrating 3-D modeling, diagramming, and photo simulations for more attractive, publishing-quality reports and presentations. Monica brings a comprehensive approach that combines technical urban planning knowledge, an emphasis on architecture and design, and a focus on feasibility of implementation.

Monica holds a Master of Architecture from the University of Michigan and a Bachelor of Arts in History from the University of California, Berkeley.

RELEVANT PROJECT EXPERIENCE:

- Avondale, AZ | Avondale City Center Specific Area Plan
- Belmont, CA | Belmont Village Specific Plan
- Burbank, CA | Single-Family Neighborhood Compatibility and Design
- Honolulu, HI | Downtown and Kalihi Neighborhood TOD Plans
- Livermore, CA | Isabel Neighborhood Plan and EIR
- Long Beach, CA | ADU and SB 9 Local Ordinances
- Los Altos, CA | Objective Design Standards
- Piedmont, CA | Mixed-Use and Multi-Family Objective Design Standards, Prototype Plans and Incentives for Accessory Dwelling Units
- Portola Valley, CA | Conceptual Site Plans, Zoning Code Amendments, and Objective Design Standards
- Rancho Cucamonga, CA | Form-Based Code
- Redwood City, CA | Hillside Regulations
- Redwood City, CA | Citywide Single-Family Residential Design Guidelines
- Saratoga, CA | Objective Design Standards
- San Bruno, CA | Bayhill Specific Plan
- San Diego, CA | Mission Valley Community Plan - Urban Design
- San Jose, CA | Santana Row/Valley Fair and Winchester Boulevard Urban Village Master Plans
- San Pablo, CA | San Pablo Avenue Specific Plan
- Santa Cruz County, CA | Accessory Dwelling Unit Guidebooks
- Seal Beach, CA | Housing Element Implementation, Objective Design Standards
- South Lake Tahoe | CA, Tahoe Valley Development and Design Standards
- South San Francisco, CA | El Camino Real/Chestnut Avenue Area Plan
- South San Francisco, CA | Zoning Code Update & Form-Based Code
- Woodland, CA | Comprehensive Zoning Code Update



PAST WORK EXPERIENCE

Dyett & Bhatia Urban and Regional Planners
Senior Associate | Oakland, CA
2006 – 2018

Kirk Miller Affiliates
Architectural Designer | San Francisco, CA
2005 – 2006

EDUCATION

University of Michigan, Ann Arbor
Master of Architecture
University of California, Berkeley
B.A. History

CERTIFICATIONS, MEMBERSHIPS, AND AWARDS

American Institute of Certified Planners (AICP)
2017 – Present

American Planning Association

- California Chapter Award of Excellence, 2018, Belmont Village Specific Plan
- Hawaii Chapter Honor Award for Urban Design, 2016, Downtown and Kalihi Neighborhood TOD Plans
- California Northern Section Award of Honor for Neighborhood Planning, 2012, El Camino Real/Chestnut Avenue Area Plan
- Arizona Chapter Award, Master Plan Category, 2009, Avondale City Center Specific Area Plan

STEFANO RICHICHI

Senior Associate

LWC

Stefano has eight years of experience focused on housing regulation and programs for establishing objective design standards, density bonus programs, inclusionary housing ordinances, and ADU ordinances. He has a practiced understanding of California housing regulation and effective strategies for legal compliance while honoring a community's vision for preserving the character of established neighborhoods and enabling attractive, affordable housing choices. Stefano supports the team in conducting site inventories and rezone candidate sites analysis, legal consistency review, workshop facilitation, and project management support.

Stefano's increasing responsibilities include serving as Deputy Project Manager for 6th Cycle Housing Element Updates in Alameda County, CA and Richmond CA, where he developed housing sites inventories, assessed existing housing policies and programs, and prepared and implemented community outreach aimed at historically disadvantaged and marginalized communities. He also created detailed demographic profiles and analyses of governmental and non-governmental constraints to housing, and works closely with City staff and the California Department of Housing and Community Development (HCD) in the Housing Element Update review, approval, and certification processes.

Stefano has a Bachelor of Arts in Economics and Philosophy from Azusa Pacific University in Azusa, California.

Relevant Project Experience:

- Alameda County, CA, 6th Cycle Housing Element Update
- Beaumont, CA, 6th Cycle Housing Element Update, Objective Design Standards and ADU Ordinance
- Coachella, CA, 6th Cycle Housing Element Update
- Costa Mesa, CA, Short-Term Rental Analysis
- Kingdom of Saudi Arabia, Development Authority Saudi Commission, Comprehensive Zoning Code
- Las Vegas, NV, Downtown Form-Based Code
- Lassen County, CA, 6th Cycle Housing Element Update and ADU Ordinance
- Lassen County, CA, Comprehensive Economic Development Strategy
- Lassen County, CA, Noise Element Update and Ordinance
- Los Altos, CA, 6th Cycle Housing Element Update
- Milpitas, CA, Comprehensive Zoning Code Update
- Novato, CA 6th Cycle Housing Element Update
- Palmdale, CA, Zoning Code Update
- Piedmont, CA, 6th Cycle Housing Element Update
- Pleasanton, CA, 6th Cycle Housing Element Update
- Richmond, CA, 6th Cycle Housing Element Update
- Riyadh, Kingdom of Saudi Arabia, Riyadh Urban Code
- San Gabriel, CA, 6th Cycle Housing Element Update
- Santa Maria, CA, 6th Cycle Housing Element Update
- Temple City, CA, 6th Cycle Housing Element Update



PAST WORK EXPERIENCE

County of Lassen, CA

Senior Planner

January 2020-August 2021

Associate Planner

April 2017-January 2020

Assistant Planner

May 2015-April 2017

City of Monterey Park, CA

Economic Development Intern

November 2014-April 2015

EDUCATION

Azusa Pacific University

Azusa, CA

Bachelor of Arts, Economics

Concentration: Business

Bachelor of Arts, Philosophy

CERTIFICATIONS & MEMBERSHIPS

American Planning Association (APA)

2021 - Present

CAROLINE CHEN

Associate

LWC

Caroline brings four years of expertise in communicating how two-dimensional regulations influence the three-dimensional environment of residential neighborhoods, commercial corridors, and mixed-use zones. She is an expert in using the Adobe Creative Suite, SketchUp, AutoCAD, and other design programs to produce infographics, maps, and 3D models that enhance LWC's Housing Element updates, housing implementation programs, development codes, and long-range plans. Caroline has taken on increasing responsibility, supporting the LWC Team on housing-related engagements in Beaumont, Alameda County, Novato, Piedmont, Saratoga, and Seal Beach.

Caroline's professional background includes knowledge of the permit application and approval process through her work with San Francisco-based Geddes Ulinskas Architects. She holds a Bachelor of Science in City & Regional Planning and a minor in Landscape Architecture from California Polytechnic University, San Luis Obispo.

RELEVANT PROJECT EXPERIENCE:

- Alameda County, CA | Implementation of the Castro Valley General Plan, 6th Cycle Housing Element Update
- Beaumont, CA | 6th Cycle Housing Element Update, Objective Design Standards, and ADU Ordinance
- Columbus, OH | Zoning Code Update
- La Quinta, CA | Highway 111 Form-Based Code
- Las Vegas, NV | Downtown Form-Based Code
- Millbrae, CA | Citywide Objective Design Standards and Implementation of Related Zoning Code Amendments for Residential Developments
- Milpitas, CA | Zoning Code Update
- Norco, CA | Industrial Standards Update
- Novato, CA | 6th Cycle Housing Element Update
- Piedmont, CA | 6th Cycle Housing Element Update
- Portola Valley, CA | Conceptual Site Plans
- Portola Valley, CA | Zoning Code Amendments
- Rancho Cucamonga, CA | Form-Based Code Revisions
- Riyadh, Saudi Arabia | Riyadh Urban Code
- Saratoga, CA | Objective Design Standards
- Seal Beach, CA | Zoning Code Update
- South San Francisco, CA | Zoning Code Update
- St. Helena, CA | Zoning Code Update
- Vacaville, CA | Development Code Update
- Woodland, CA | Comprehensive Zoning Code Update



PAST WORK EXPERIENCE

Geddes Ulinskas Architects
Project Designer | San Francisco, CA
September 2019 – January 2021

Urban Planning Concepts
Planning Intern | Santa Maria, CA
June 2018 – August 2018

EDUCATION

California Polytechnic State University
B.S., City & Regional Planning | San Luis Obispo, CA
Minor in Landscape Architecture

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INC.

CARLA VIOLET

ASSOCIATE PRINCIPAL AND PLANNING MANAGER

EXPERIENCE

Carla has ten years of experience in land use planning and environmental review services. She has managed several large projects with community outreach and engagement efforts customized to address specific project objectives, anticipated challenges and opportunities, and community concerns. She is skilled at effectively evolving community engagement strategies, as needed, to ensure responsiveness to project issues that arise during the planning process and to ensure an appropriately representative cross-section of the community and/or stakeholders are engaged. Carla has been a key player in Urban Planning Partners' success in gaining an informed and more aligned citizenry that supports change once the change is better understood.

Carla previously managed the entitlements assistance and community engagement process for the El Cerrito Plaza TOD project. This includes strategizing with the developer team, the City of El Cerrito, and BART on an entitlements process for securing project entitlements under Assembly Bill 2923 and the San Pablo Avenue Specific Plan as well as facilitating focused stakeholder meetings and both virtual and pop-up community meetings. She co-led the community engagement efforts for the Irvington BART Station Site Plan and Area Plan, collaborating closely with the City of Fremont and BART, ultimately evolving significant community opposition to valuable input and support. She also played a key part in supporting Urban Planning Partners role in leading all the City of Richmond's community outreach and engagement efforts related to its review and ultimate approval of the Chevron Refinery Modernization project, which involved a series of educational sessions and many stakeholder and community workshops, including a final series related to prioritizing community benefits.

PROJECT EXPERIENCE HIGHLIGHTS

- Link21 BART East Bay Relationship Manager
- Portola Valley Housing and Safety Elements Update and Community Engagement
- MTC/ABAG, Alameda County Housing Collaborative Technical Assistance, CA – Project Manager
- El Cerrito Plaza BART TOD Entitlements and Community Engagement, El Cerrito and BART
- Downtown and Brentwood Boulevard Specific Plan Updates
- Irvington BART Station Site Plan and Area Plan Community Engagement, City of Fremont and BART
- Chevron Refinery Modernization Project Outreach, Richmond, CA
- Eastline Project at 2100 Telegraph Avenue Entitlements and EIR, Oakland, CA
- Alameda Point Main Street Neighborhood Specific Plan

CAREER

Houseal Lavigne Associates

Associate Intern

Texas Low Income Housing Information Services

Policy Analyst Intern

Energy Solutions

Contracts Manager

CERTIFICATION

IAP2 Foundations in Public Participation

EDUCATION

Master of Science, Community and Regional Planning, University of Texas at Austin

Bachelor of Arts, Sociology, University of California, Davis

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CURTIS BANKS, AICP
ASSOCIATE PRINCIPAL

EXPERIENCE

Curtis has over 30 years of experience with expertise in planning and community development, including planning, building, affordable housing, and code enforcement. He has served as a Community Development Director and has worked in a variety of capacities. Curtis has experience interacting closely with elected officials, senior management, commissioners, city departments, state and local agencies, and members of the public. He is skilled at leading staff, preparing budgets, and managing complex planning projects. He has managed comprehensive General Plan updates, Downtown Development Plan updates, Neighborhood Plans, and the preparation of ordinances. Curtis has worked on a wide variety of residential and nonresidential projects, included mixed-use projects, and has overseen the management of affordable housing programs. Curtis was the project manager for the redevelopment of a 20-acre industrial site for the City of Redwood City. Curtis was also the Project Director for the Saratoga Housing Element Update and EIR, the Portola Valley Housing and Safety Element Updates IS/MND, and the Antioch Housing and Safety Element Updates and EIR.

PROJECT EXPERIENCE HIGHLIGHTS

- Harbor View Redevelopment Project, Contract Planning, Redwood City, CA
- 505 East Bayshore Townhouse Project, Contract Planning Redwood City, CA
- Roselli Park Expansion IS/MND, Contract Planning, Redwood City, CA
- 6781 Thorton Avenue Mixed Use Project, Contract Planning, Newark, CA
- Affordable Housing Program Management, Foster City, CA
- Land Use/Circulation, Housing, and Recreation Elements of the General Plan, Foster City, CA
- Foster Square Mixed Use Senior Development, Foster City, CA
- Pilgrim Triton Master Plan, Foster City, CA
- Levee Protection Planning and Improvements Project, Foster City, CA
- Gilead Sciences Master Plan, Foster City, CA
- Lincoln Centre Life Sciences Research Campus Project, Foster City, CA

CAREER

City of Foster City	Community Development Director/Planning Manager/Senior Planner
City of Los Gatos	Planning Consultant
City of Los Altos	Senior Planner
City of Mountain View	Senior Planner
City of Morgan Hill	Senior Planner
City of Menlo Park	Associate Planner
City of Campbell	Planner II/I/Intern

EDUCATION

Master of Urban & Regional Planning, San Jose State University
 Bachelor of Arts, Public Administration/Political Science, Hayward State University

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GRANT SLES ASSOCIATE PLANNER

EXPERIENCE

Grant's background in long-range planning, policy development, and program implementation allows him to support Urban Planning Partners with long-range planning efforts, entitlements assistance, and development application review. In his previous work with Dudek, Grant provided support with existing conditions analyses, public workshops and outreach events, and policy writing. He has experience working in a variety of communities on issues related to land use, transportation, climate resilience, and environmental justice. Moreover, he has helped manage both large and small long-range planning projects.

Drawing upon his strong technical experience, Grant effectively analyzes data and create maps and graphics to convey research findings, design and facilitate community outreach activities, and develop actionable policies to address issues and achieve project goals. He is currently assisting to develop tools to advance affordable housing development in jurisdictions throughout Alameda County via the Alameda County Housing Collaborative.

PROJECT EXPERIENCE HIGHLIGHTS

- MTC/ABAG, Alameda County Housing Collaborative Technical Assistance, CA
- Newport Beach Comprehensive General Plan Update, Newport Beach, CA*
- Fresno Climate Adaptation Plan and Environmental Justice Element, Fresno, CA*
- Concord Housing Element Update, Concord, CA*
- Rialto General Plan Update, Rialto, CA*
- Eureka Waterfront Specific Plan, Eureka, CA*
- Clark County Aging Readiness Plan, Clark County, WA*
- Ventura County ADU Ordinance Update, Ventura County, CA*

CAREER

Dudek
County of Ventura
Institute of Transportation Studies

Planner II
CivicSpark Fellow
Advanced Research Aid

EDUCATION

Bachelor of Science, Environmental Policy Analysis and Planning, University of California, Davis

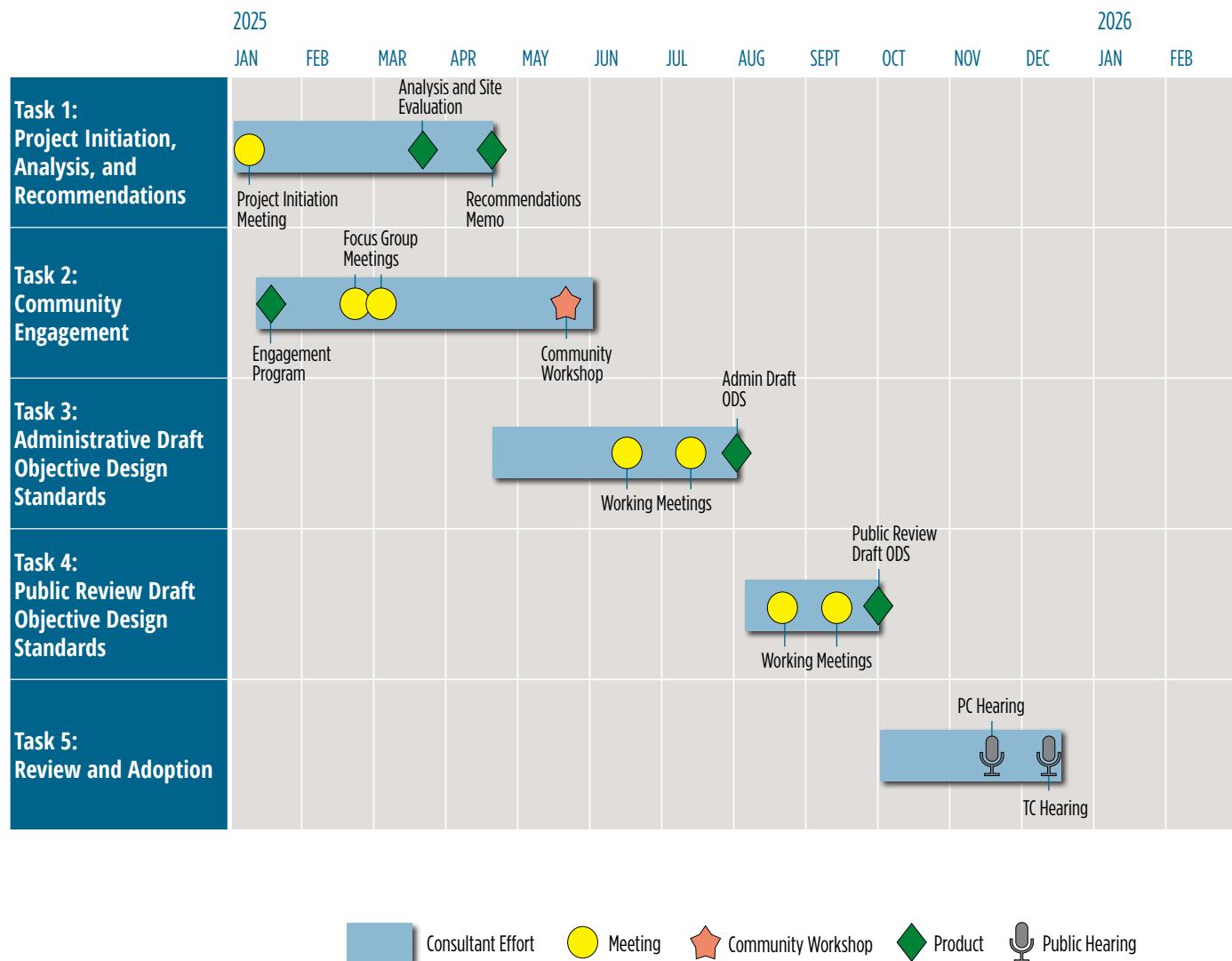
* Work with previous employer

TIMELINE

Town of Los Gatos

Updated/Additional Objective Design Standards

Project Schedule | October 26, 2024



SAMPLES

City Name	Project (Link to)
City of Piedmont	Multi-Family and Mixed-Use Design Standards
City of Saratoga	Article 15-58 - Mixed-Use and Multi-Family Design and Development Standards
City of Redwood City	Residential Design Guide

DISCLOSURE OF LITIGATION/DISCIPLINE

As the President and CEO of Lisa Wise Consulting, Inc., I attest that the firm has not been disciplined or censured by a regulatory body within the last 5 years nor has the firm been involved in litigation or other legal proceedings relating to the provision of services.



Lisa Wise, AICP
 President, CEO
lisa@lisawiseconsulting.com
 (805) 595-1345

REFERENCES

ATTACHMENT 2 - REFERENCES

THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

OBJECTIVE DESIGN STANDARDS CONSULTANT SERVICES

List three (3) references for work of a similar nature to the Services performed within the last five (5) years. Use additional sheets as necessary.

1.	City of Los Altos (former), City of Marina (current)	211 Hillcrest Ave, Marina, CA 93933 (current)
Name of Agency	Agency Address	
Guido F. Persicone, MUP, AICP	Community Development Director (current)	
Contact Name	Contact Title	
(831) 884-1281	gpersicone@cityofmarina.org	
Contact Telephone	Contact Email Address	
May 2020 – September 2021	\$341,750	
Contract Period	Contract Amount	

Objective design standards for zoning districts supporting multi-family and mixed-use development, including review

of existing standards, stakeholder interviews and study sessions, and micro-scale analysis of built form in key areas.

Description of services performed including costs.

2.	City of Piedmont	120 Vista Ave, Piedmont, CA 94611
Name of Agency	Agency Address	
Kevin Jackson, AICP	Planning & Building Director	
Contact Name	Contact Title	
(510) 420-3039	kjackson@piedmont.ca.gov	
Contact Telephone	Contact Email Address	
September 2020 – September 2023	\$159,930	
Contract Period	Contract Amount	

Objective design standards for mixed-use and multi-family development, including assessment of existing guidelines;

stakeholder interviews, workshops, and survey; and financial feasibility analysis of development sites.

Description of services performed including costs.

3.	City of Saratoga	13777 Fruitvale Ave, Saratoga, CA 95070
Name of Agency	Agency Address	
Christopher Riordan	Senior Planner	
Contact Name	Contact Title	
(408) 868-1235	criordan@saratoga.ca.us	
Contact Telephone	Contact Email Address	
September 2022 – October 2023	\$159,511	
Contract Period	Contract Amount	

Objective design standards for multi-family and residential mixed-use opportunity sites, including evaluation of proposed

housing opportunity areas, review of recent projects, and site testing for opportunity sites with proposed standards.

Description of services performed including costs.

I hereby certify that the Proposer performed the work listed above.

Signature of Proposer



Henry Pontarelli

Name

October 18, 2024

Date

INSURANCE COVERAGE



LISAWIS-01

BOTCERTS

DATE (MM/DD/YYYY)

CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERs NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 0305584 Morris & Garritano Insurance Agency, Inc. PO Drawer 1189 San Luis Obispo, CA 93406	CONTACT NAME: Megan Chew PHONE (A/C, No, Ext): (805) 543-6887 341 FAX (A/C, No): (805) 543-3064 E-MAIL ADDRESS: mchew@morrisgarritano.com
	INSURER(S) AFFORDING COVERAGE INSURER A : Sentinel Insurance Company NAIC # 11000 INSURER B : Ohio Security Insurance Company NAIC # 24082 INSURER C : Oak River Insurance Company NAIC # 34630 INSURER D : Twin City Fire Insurance Company NAIC # 29459 INSURER E : INSURER F :
INSURED Lisa Wise Consulting, Inc. 983 Osos Street San Luis Obispo, CA 93401	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED, NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE			ADDL INSD	SUBR WWD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS							
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY					51SBABA5314	4/1/2024	4/1/2025	EACH OCCURRENCE	\$	2,000,000					
	<input type="checkbox"/> CLAIMS-MADE	<input checked="" type="checkbox"/> OCCUR							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$	1,000,000					
									MED EXP (Any one person)	\$	10,000					
									PERSONAL & ADV INJURY	\$	2,000,000					
									GENERAL AGGREGATE	\$	4,000,000					
									PRODUCTS - COMP/OP AGG	\$	4,000,000					
										\$						
GEN'L AGGREGATE LIMIT APPLIES PER:									COMBINED SINGLE LIMIT (Ea accident)	\$	1,000,000					
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY					BAS56524792	4/1/2024	4/1/2025	BODILY INJURY (Per person)	\$						
	<input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY	<input type="checkbox"/> SCHEDULED AUTOS							BODILY INJURY (Per accident)	\$						
	<input checked="" type="checkbox"/> HIRED AUTOS ONLY	<input type="checkbox"/> NON-OWNED AUTOS ONLY							PROPERTY DAMAGE (Per accident)	\$						
										\$						
										\$						
UMBRELLA LIAB			OCCUR						EACH OCCURRENCE	\$						
EXCESS LIAB			CLAIMS-MADE						AGGREGATE	\$						
DED RETENTION \$										\$						
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			Y / N ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N / A	LIWC524575	4/1/2024	4/1/2025	<input checked="" type="checkbox"/> PER STATUTE		OTHE- R					
	If yes, describe under DESCRIPTION OF OPERATIONS below								E.L. EACH ACCIDENT	\$	1,000,000					
									E.L. DISEASE - EA EMPLOYEE	\$	1,000,000					
									E.L. DISEASE - POLICY LIMIT	\$	1,000,000					
D	Professional Liab.					51PG028245723	4/1/2024	4/1/2025	Per Claim & Agg.							
D	Professional Liab.								Deductible							

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Re: Proof of Insurance.

CERTIFICATE HOLDER

CANCELLATION

Proof of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

John M. Jr. Brown

PRELIMINARY FEE SCHEDULE

Town of Los Gatos

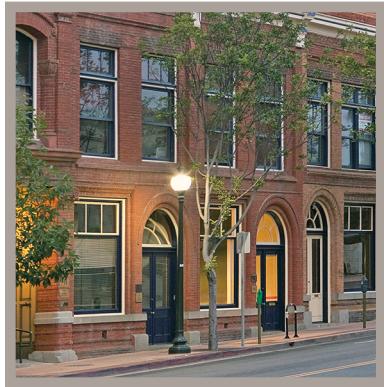
Updated/Additional Objective Design Standards

Budget Worksheet | October 26, 2024

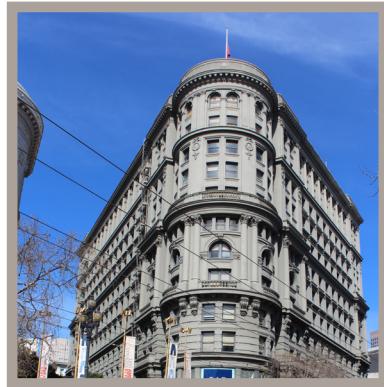
	LWC								UPP						TOTAL		
	Principal		Director		Senior		Associate		LWC Total	Principal		Project Manager		Project Planner		UPP Total	
	\$297		\$250		\$195		\$160			\$250		\$230		\$155			
	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	
TASK 1 PROJECT INITIATION AND ANALYSIS																	
1A	Project Initiation Meeting and Site Tour	2	\$ 594	4	\$ 1,000	8	\$ 1,560	8	\$ 1,280	22	\$ 4,434	6	\$ 1,500	6	\$ 1,380	6	\$ 930
1B	Analyses and Evaluation	-	\$ -	4	\$ 1,000	20	\$ 3,900	20	\$ 3,200	44	\$ 8,100	2	\$ 500	4	\$ 920	6	\$ 930
1C	Recommendations Memo	2	\$ 594	4	\$ 1,000	20	\$ 3,900	20	\$ 3,200	46	\$ 8,694	-	\$ -	-	\$ -	-	\$ -
Task 1 Subtotal		4	\$ 1,188	12	\$ 3,000	48	\$ 9,360	48	\$ 7,680	112	\$ 21,228	8	\$ 2,000	10	\$ 2,300	12	\$ 1,860
TASK 2 COMMUNITY ENGAGEMENT																	
2A	Community Engagement Program		\$ -	2	\$ 500	6	\$ 1,170	6	\$ 960	14	\$ 2,630	-	\$ -	-	\$ -	-	\$ -
2B	Focus Group Meetings (2)	-	\$ -	4	\$ 1,000	12	\$ 2,340	12	\$ 1,920	28	\$ 5,260	8	\$ 2,000	12	\$ 2,760	16	\$ 2,480
2C	Community Workshop	-	\$ -	8	\$ 2,000	32	\$ 6,240	32	\$ 5,120	72	\$ 13,360	8	\$ 2,000	24	\$ 5,520	40	\$ 6,200
Task 2 Subtotal		-	\$ -	14	\$ 3,500	50	\$ 9,750	50	\$ 8,000	114	\$ 21,250	16	\$ 4,000	36	\$ 8,280	56	\$ 8,680
TASK 3 ADMINISTRATIVE DRAFT																	
3A	Working Meetings with Town Staff (2)	-	\$ -	2	\$ 500	8	\$ 1,560	8	\$ 1,280	18	\$ 3,340	6	\$ 1,500	8	\$ 1,840	8	\$ 1,240
3B	Administrative Draft ODS	-	\$ -	4	\$ 1,000	36	\$ 7,020	36	\$ 5,760	76	\$ 13,780	2	\$ 500	6	\$ 1,380	8	\$ 1,240
Task 3 Subtotal		-	\$ -	6	\$ 1,500	44	\$ 8,580	44	\$ 7,040	94	\$ 17,120	8	\$ 2,000	14	\$ 3,220	16	\$ 2,480
TASK 4 PUBLIC REVIEW DRAFT																	
4A	Working Meetings with Town Staff (2)	-	\$ -	2	\$ 500	6	\$ 1,170	6	\$ 960	14	\$ 2,630	6	\$ 1,500	8	\$ 1,840	8	\$ 1,240
4B	Public Review Draft ODS	2	\$ 594	4	\$ 1,000	16	\$ 3,120	16	\$ 2,560	38	\$ 7,274	2	\$ 500	6	\$ 1,380	8	\$ 1,240
Task 4 Subtotal		2	\$ 594	6	\$ 1,500	22	\$ 4,290	22	\$ 3,520	52	\$ 9,904	8	\$ 2,000	14	\$ 3,220	16	\$ 2,480
TASK 5 REVIEW AND ADOPTION																	
5A	Planning Commission Hearing (1)		\$ -	4	\$ 1,000	12	\$ 2,340	12	\$ 1,920	28	\$ 5,260	-	\$ -	-	\$ -	-	\$ -
5B	Town Council Hearing (1)	-	\$ -	4	\$ 1,000	10	\$ 1,950	10	\$ 1,600	24	\$ 4,550	-	\$ -	-	\$ -	-	\$ -
Task 5 Subtotal		-	\$ -	8	\$ 2,000	22	\$ 4,290	22	\$ 3,520	52	\$ 9,810	-	\$ -	-	\$ -	-	\$ -
Direct Costs (Not to Exceed)											1,500		\$ -	\$ -	\$ -	\$ -	\$ 1,500
Project Total		6	\$ 1,782	46	\$ 11,500	186	\$ 36,270	186	\$ 29,760	424	\$ 80,812	40	\$ 10,000	74	\$ 17,020	100	\$ 15,500
OPTIONAL TASKS																	
6A	Additional Focus Groups (per meeting)	-	\$ -	4	\$ 1,000	8	\$ 1,560	8	\$ 1,280	20	\$ 3,840	4	\$ 1,000	6	\$ 1,380	8	\$ 1,240
6B	Educational Story Map and Survey	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	6	\$ 1,500	8	\$ 1,840	24	\$ 3,720
6C	Test Site Feasibility Analysis/Proforma	8	\$ 2,376	24	\$ 6,000	24	\$ 4,680	16	\$ 2,560	72	\$ 15,616	-	\$ -	-	\$ -	-	\$ -
6D	Community Open House on PRD	-	\$ -	8	\$ 2,000	24	\$ 4,680	24	\$ 3,840	56	\$ 10,520	8	\$ 2,000	24	\$ 5,520	24	\$ 3,720
6E	PC/TC Study Session (per meeting)	2	\$ 594	6	\$ 1,500	16	\$ 3,120	16	\$ 2,560	40	\$ 7,774	-	\$ -	-	\$ -	-	\$ -
6F	PC/TC Hearing (per hearing)	2	\$ 594	4	\$ 1,000	10	\$ 1,950	10	\$ 1,600	26	\$ 5,144	-	\$ -	-	\$ -	-	\$ -

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