



December 13, 2012

Vikrant Sood
Regional Prosperity Plan Program Manager
Metropolitan Transportation Commission
101 Eighth Street, Oakland, California 94607

Dear Mr. Sood:

Reconnecting America is pleased to submit this proposal in response to the Housing the Workforce Sub-Grants Call for Projects, under the Deed Restricted Affordable Housing Policy activity. Reconnecting America and its subconsultant, the California Housing Partnership Corporation (CHPC), are together uniquely qualified to complete the proposed project: Preserving Affordable Housing near Transit. Our team brings national experience in TOD planning, affordable TOD policy, and market analysis, affordable housing risk-assessment and development of affordable housing preservation strategies. Additionally, our experience includes strong local familiarity and experience with the affordable housing preservation needs and challenges of Bay Area jurisdictions.

The preservation of affordable housing near transit is a critical component to addressing the affordable housing crisis in the Bay Area today. Not only is preservation a cost effective measure (typically, preserving a unit of affordable housing is half the cost of building a new unit), more than 6,500 of the area's affordable rental homes are at risk of converting to market rate in the next five years.ⁱ Affordable housing units located near transit offer particular benefits to the low-income families who live there, including access to jobs and regional opportunities and reduced transportation costs. However, there is growing demand for housing near transit in the Bay Area, creating the risk of displacement in many transit-rich neighborhoods.

In the proposed project, Preserving Affordable Housing near Transit, Reconnecting America and CHPC will conduct spatial analysis on the location of concentrations of at-risk affordable properties near transit and work with local government to implement policy solutions for preserving those properties. We will begin with a region-wide analysis, identifying where at-risk affordable housing units are located in relation to existing and proposed transit and Priority Development Areas. We will then focus on three jurisdictions, including the cities of San Jose and Fremont, as well as a third local partner that will be identified through the regional analysis, to provide more specific study and recommendations. This local analysis will identify the type and scale of affordable housing preservation need, how enhanced transit connections may impact the supply of affordable housing, and work to align or supplement existing policies in order to preserve affordable units. The project will also include a Preservation Toolkit including suggestions for how other jurisdictions can approach their own affordable housing preservation needs.

The project will result in both local and regional policy and systems change. Locally, the project will provide tools and technical expertise and will build the capacity of community stakeholders, affordable housing advocates and jurisdiction staff across the region to empower them to understand local preservation needs and identify the tools and strategies that best suit those needs. Reconnecting America and CHPC have already identified San Jose and Fremont as local partners for this study. The BART to San Jose corridor will dramatically increase the access to jobs and regional opportunities in these communities, and may change the housing market as a result, making these areas a priority for affordable housing preservation. The Preserving Affordable Housing near Transit project

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will leverage work CHPC is currently undertaking for the City of San Jose to identify and preserve affordable housing and has the support of both the Cities of Fremont and San Jose (see attached letters).

Regionally, this project will, for the first time, identify where at-risk affordable housing is located in relation to high quality transit, PDAs, and Communities of Concern. ABAG and MTC's regional policymaking can benefit from this analysis and use it to inform regional programs. This work could guide future decision-making around regional and local affordable housing funding and financing mechanisms, and be a resource for local jurisdictions and advocates

Together, Reconnecting America and CHPC bring a wealth of expertise on affordable housing and transit. Reconnecting America recently completed the report "Preservation in Transit-Oriented Districts: A Study on the Need, Priorities, and Tools in Protecting Assisted and Unassisted Housing in the City of Los Angeles." RA worked in close collaboration with the City of Los Angeles Housing Policy and Planning Division to identify transit-oriented districts that are priorities for affordable housing preservation based on an empirical approach. Elizabeth Wampler, Program Associate at Reconnecting America, will be managing the work. Ms. Wampler has led technical assistance efforts with collaboratives and jurisdictions across the country on integrating equity and affordable housing considerations into TOD plans and has conducted research assessing neighborhood change.

Leading the team for CHPC are President & CEO Matt Schwartz and Housing Preservation Manager Nadia Shihab. CHPC was created by the state of California to provide leadership on affordable housing preservation policy and is nationally recognized for its work preserving at risk housing in California. CHPC has worked closely with the cities of Los Angeles and San Francisco in developing their nationally recognized affordable housing preservation programs. CHPC manages a database of all federally subsidized affordable properties in the state with regularly updated information from HUD and state agencies on the financing, ownership, and physical condition of these properties. CHPC uses this database to provide risk-assessment for local governments as well as non-profit developers committed to preservation.

If you have any questions or require further information please contact Elizabeth Wampler in Reconnecting America's Oakland office at ewampler@reconnectingamerica.org or (510) 268-8602 ext. 202. For further information on CHPC you may also contact Nadia Shihab at nshihab@chpc.net or (415) 433-6804 ext. 316. We look forward to hearing from you.

Sincerely,



Allison Brooks
Chief of Staff
Reconnecting America

ⁱ CHPC Preservation Clearinghouse



Bay Area Regional Prosperity Plan
HOUSING THE WORKFORCE SUB-GRANTS 2012-2013

APPLICATION FORM

Please review the 2012-2013 Call for Projects document for additional information

Submitting Applications

Applications for the Housing the Workforce Sub-Grants should be submitted in **electronic format only** to Vikrant Sood, Regional Prosperity Plan Program Manager, at vsood@mtc.ca.gov by **4:00 pm, Thursday, December 13, 2012**. Applications received after this date and time will not be considered for funding. Applications that are not complete will not be considered for funding. Applicants are advised to submit their application as ONE file in Adobe PDF format.

Project Summary

Lead Applicant (organization)	Reconnecting America
Lead Applicant Type of Organization (delete that do not apply)	<ul style="list-style-type: none"> ▪ Other (describe): national non-profit
Lead Applicant Tax Exempt Status (delete that do not apply)	<ul style="list-style-type: none"> ▪ Yes
Lead Applicant Signatory to Consortium Agreement (delete that do not apply)	<ul style="list-style-type: none"> ▪ Yes: Reconnecting America is one of the signatories on MTC's original application to HUD.
Lead Applicant Contact Information (project manager for lead applicant, mailing address, email and phone number)	Elizabeth Wampler 436 14 th Street, Suite 1005 Oakland, CA 94612 ewampler@reconnectingamerica.org 510-268-8602 x 202
Partner Applicant(s) (list all, if applicable)	California Housing Partnership Corporation
Category of Eligible Activity (delete that do not apply)	<ul style="list-style-type: none"> ▪ Deed Restricted Affordable Housing Policy
Project Name	Preserving Affordable Housing near Transit
Brief Description (50 to 100 words maximum)	<i>The Preserving Affordable Housing near Transit project will identify the location of concentrations of at-risk affordable properties near transit and work with local governments to implement policy solutions for preserving those properties. It will begin with a regional spatial analysis, and then focus on three jurisdictions, including the cities of San Jose and Fremont, as well as an additional jurisdiction that will be identified through the regional analysis, to provide more specific study and recommendations. The project will also include a Preservation Toolkit including suggestions for how other</i>

	<i>jurisdictions can approach their own affordable housing preservation needs.</i>
Geographic Area of Proposed Project (city, county, sub-region in the Bay Area)	9-County Bay Area Region, BART to San Jose corridor (including Fremont, San Jose), 1 additional jurisdiction TBD
Amount Request from Housing the Workforce Sub-Grant 2012-2013 (no more than one-third of the total available funding for this round)	\$67,194

Proposed Project

A. Describe the Project (1,000 words maximum)

At a minimum, describe the need for this project, key components and outcomes, target population and/or community, geographic location and coverage, key work elements and deliverables, partners, and outreach and engagement approach.

Project Need:

The Bay Area is one of the most unaffordable places for working families in the US. “Only 15 percent of the existing for-sale housing stock in the Bay Area is affordable to workforce households...earning median income” and “in the last [RHNA] cycle, Bay Area jurisdictions met only 44% of the target for very low-income units.”¹ In the five central Bay Area counties there is a shortfall of nearly 100,000² rental units affordable to extremely low income (ELI) renters earning less than 30% of the area median income. Consequently, ELI families on average pay 60% (East Bay) to 74% (SF/Peninsula/Marin) of their income for housing. At the same time, more than 6,500 of the area’s affordable rental homes are at risk of converting to market rate in the next five years.³ Preserving affordable housing is one crucial component to addressing this challenge, meeting low-income families’ housing needs, while also preventing displacement in gentrifying neighborhoods.

The Preserving Affordable Housing near Transit project will create tools and policies to preserve affordable housing in communities with high quality transit access. Low-income families with access to high quality transit can benefit from increased access to jobs and save significantly on transportation costs. However, as demand for living near transit grows, housing could be less affordable to low-income families in these communities. Preservation of affordable housing, typically half the cost of building new housing, provides a cost-effective means of ensuring that low-income families have equitable access to transit rich neighborhoods. To date, only one of five central Bay Area counties has implemented a comprehensive affordable housing preservation policy, meaning that the risk of displacement around current and future transit corridors is likely to escalate over time unless local governments intentionally deploy policies to address these issues.

Key Components: See Key Work Elements.

Key Outcomes:

- Identify high concentrations of at-risk units in the region’s transit rich areas, PDAs, and Communities of Concern.

¹ MTC Application to Department of Housing & Urban Development Regional Planning Grant Program, October 2011.

² CHAS 2005-09

³ CHPC Preservation Clearinghouse

- Improve understanding of how changing market pressures and transit investments impact affordable housing stock locally.
- Align or augment preservation policies and strategies in three jurisdictions.
- Create Preservation Toolkit to support local government efforts to preserve affordable housing near transit.

Target Population: (See section D.)

Geographic Location / Coverage:

Regional and local. Local coverage will focus on Fremont and San Jose, who have already committed to participating in the project, and one other to be selected through regional scan. Each jurisdiction represents different sizes, internal capacities, transit profiles, and preservation challenges.

Key Work Elements and Deliverables:

Task 1. Advisory Committee Working Sessions and Regular Meetings with Regional Prosperity Plan Working Groups

Reconnecting America (RA) and the California Housing Partnership Corporation (CHPC), hereafter, the Team, will convene an Advisory Committee (see section G) of stakeholders in key communities and from the Regional Prosperity Plan working groups. The Advisory Committee will advise the Team on technical and policy questions. The Team will continue attending Housing the Workforce meetings and provide regular updates and presentations to all three Regional Prosperity Plan working groups as appropriate.

Deliverable:

- Share detailed work approach and updates with Advisory Committee and Regional Prosperity Plan working groups.

Task 2. Regional Scan

Task 2a. Regional mapping and analysis

CHPC will conduct an initial data and risk assessment using its comprehensive database of at-risk federally subsidized housing. RA will map these properties and overlay existing and proposed transit service, ABAG’s Priority Development Areas, and MTC’s Communities of Concern. Transit and job proximity and PDAs will help identify where market pressures are highest, while the Communities of Concern information will inform the vulnerability of neighborhoods to displacement.

Task 2b. Identify third local partner

RA and CHPC have already identified San Jose and Fremont as local partners for this study, and have the support of housing officials in both cities. The increased access to job centers and other destinations from the planned BART extension to San Jose makes these areas a regional priority for affordable housing preservation. To ensure that this project covers a variety of communities, the Team will identify one additional community to work with in Task 3. This community will be chosen based on preservation needs, transit-richness, interest of staff and leaders in the local jurisdiction, the need for capacity building and support, and input from the Advisory Committee.

Deliverables:

- Regional maps and explanatory memo.
- Identification of third local partner.

Task 3. Local Technical Assistance and Implementation

The Team will work with San Jose, Fremont, and one other local partner city to engage jurisdiction staff and community stakeholders on four key questions:

1. What is the preservation need? What is the risk of losing existing affordable housing through expiring subsidy contracts, affordability agreements and mortgages, the ratio of restricted rents to market rents, the properties' physical condition, and the owners' sophistication and capacity?
2. What is the vulnerability of market rate (non-price restricted) housing that currently serves low-income residents? Where applicable, this may include properties covered by local rent control ordinances.
3. Are there particular neighborhoods where preservation efforts should be focused (due to transit richness, market pressures, etc.)?
4. How can each jurisdiction augment or align current tools and strategies to address their specific preservation needs?

Because each community will have different characteristics (city size, capacity of local city staff, preservation need and type of vulnerable housing stock), answering these questions may lead to tailored approaches. The Team will support local jurisdictions with technical assistance, mapping, policy analysis and CHPC's database to explore these questions and solutions.

Deliverables:

- Jurisdiction-tailored approach.
- Maps illustrating the spatial relationship of at-risk affordable housing and transit.
- Memos outlining preservation need in each community and how current tools can be coordinated or augmented.

Task 4. Preservation Toolkit

This document will build off of work with San Jose, Fremont, and one other community in Task 3 and will be designed as a guide for jurisdictions with varying capacity and preservation needs. Preservation tools will be framed to offer jurisdictions a way to approach their particular preservation challenges.

Deliverables:

- Preservation Toolkit.

Partners and Outreach / Engagement Approach:

(See sections F, G.)

B. Sub-Grant Objectives Addressed by Proposed Project (delete that do not apply)

1. Meet the housing needs of low- and very low-income households in the region while also reducing their transportation costs and improving access to jobs and economic opportunities;
2. Support the production of new affordable housing units near transit, preserve existing affordable housing units, and/or minimize the impacts of gentrification on low- and very low-income households;
3. Explore new approaches remove barriers to the development and preservation of affordable housing units as well as neighborhood stabilizations;
4. Engage under-represented communities as well as non-profit partners, community leaders, local jurisdictions, regional agencies, and philanthropic entities in the planning, implementation and decision-making process;
5. Catalyze policy and systems change at the local, sub-regional and regional level to promote access to affordable housing; and
6. Build institutional and organizational capacity among partners and stakeholders at the local, sub-regional and regional level to sustain the work beyond the term of this grant program.

C. How will the proposed project impact broad policy and systems change at the local, sub-regional and/or regional level? (200 words maximum)

The Preserving Affordable Housing near Transit project will result in both local and regional policy and systems change. Locally, the project will facilitate better coordination of existing tools or implementation of new tools that will preserve affordable housing near transit in three key communities in the Bay Area, including San Jose, Fremont, and one other. In addition to changing the systems in these jurisdictions, these policies will serve as models for other jurisdictions in the Bay Area.

Regionally, this project will, for the first time, identify where at-risk affordable housing is located in relation to high quality transit, PDAs, and Communities of Concern. The preservation toolkit will enable other jurisdictions across the region to pick up this deliverable and use it in their own work, with guidance on how local conditions inform appropriate strategies. ABAG and MTC's regional policymaking can benefit from this analysis and use it to inform regional programs including One Bay Area implementation. This work could guide future decision-making around regional and local affordable housing funding and financing mechanisms, and be a resource for local jurisdictions and advocates.

D. Who is most likely to benefit from the proposed project? What is the target population or community? Outline characteristics of the community? (500 words maximum)

The Preserving Affordable Housing near Transit project is focused on addressing the housing needs of low-income families (including specifically extremely low income, very low, and low-income households). The project will result in improved access to affordable housing in neighborhoods with reduced transportation costs by preserving existing affordable housing near transit in three key communities and serving as a model for how other communities can do the same. Communities experiencing (or at-risk of experiencing) gentrification will also benefit by better understanding the link between transit investments, existing affordable housing and changing market pressures.

Communities in San Jose and Fremont will have increased access to jobs and regional opportunities

when the BART to San Jose transit project is complete. These communities both have significant populations of low-income families that can benefit from this transit investment if there is sufficient housing in these neighborhoods affordable to them. However, this increased access to regional destinations will increase market pressures in these neighborhoods, putting them at higher risk for gentrification and displacement. Working with city staff, leaders and community advocates to identify the preservation priorities in these communities will help stabilize these neighborhoods while offering a path for other jurisdictions facing similar challenges. A comprehensive preservation strategy could ultimately ensure the lasting affordability of more than 1,250 homes in San Jose and Fremont (in addition to homes in the third partner jurisdiction) which otherwise could be removed from the Cities' affordable stock in the next several years.

The scope of work includes a deeper evaluation of the Communities of Concern in particular, both at the regional and local scale. Though some of these are not near rail stations, they nonetheless have a higher propensity for transit dependence and may rely heavily on the local transit network. This study will provide further detail on the vulnerable affordable housing stock in each Community of Concern across the region, and will potentially offer deeper preservation strategies in the Communities of Concern in the three partner jurisdictions. At a minimum, these will include one in central Fremont and forty-nine in San Jose, including areas of East San Jose.

E. Can the proposed project serve as a model and/or best practice for other communities in the region? Describe how and why? Which other communities? (200 words maximum)

Yes, the Preserving Affordable Housing near Transit project is envisioned to serve as both a starting point and a model for other communities in the region. Many cities have affordable housing stock that is at-risk or may be at-risk in the near future (because of expiring subsidy contracts, affordability agreements and mortgages, changing market conditions, new transit and TOD-related investments, the physical condition of the properties and the sophistication and capacity of owners). These communities need solutions to help identify what their preservation challenges are and how existing tools may be coordinated or augmented to preserve affordable housing near transit. The regional scan will help identify particular communities in the region with significant number of units that are at risk in transit-rich places, PDAs, and Communities of Concern. The Preservation Toolkit will offer data from the regional scan and capture the lessons learned from working with local governments and the ways in which preservation strategies can be tailored to specific local conditions to help inform other communities seeking to preserve their existing stock.

F. Who are the potential partners on this project? How will they be engaged? (200 words maximum)

Reconnecting America and the California Housing Partnership Corporation are the primary Team on this project, and together will engage with a broad range of stakeholders and community representatives. These stakeholders will be engaged primarily through the Advisory Committee that the Team will form and through regular work in each of the three local partner jurisdictions (see section G for more detail). The Team will solicit regular feedback from the project's Advisory Committee (which will meet bimonthly) and will give regular presentations and gather feedback from the three Regional Prosperity Plan workgroups.

The Team will leverage existing partnerships (including the Region 9 Working Group of DOT, HUD, EPA, CalTrans, CA HCD, MTC, and ABAG; and Great Communities Collaborative, who are both working on the

BART to San Jose corridor on issues related to affordable housing and transit-oriented development) and forge new partnerships, where appropriate. Some of the primary partnerships that will be formed through this project will be with city staff and stakeholders in San Jose, Fremont, and one other local jurisdiction, and community leaders and activists in those cities. (More below in section G.)

G. How will the project engage the community and stakeholders, partners, and working groups? Highlight process for engaging under-represented communities. (500 words maximum)

The Team will convene an Advisory Committee of stakeholders involved directly with communities in the targeted areas. These stakeholders will represent organizations and local agencies that are already addressing equity in housing and economic development planning through advocacy, community engagement, and community organizing. This may include but is not limited to:

Potential Committee Member	Reason for Engagement/ Expertise
Karina Muñiz, Urban Habitat	GCC member, actively working in San Jose, Fremont to build capacity and organize around equitable TOD
Parisa Fatehi-Weeks, Public Advocates	Leader of the Six Wins effort; engaged with strong array of low-income stakeholder groups
Kevin Zwick, Housing Trust of Santa Clara County	Significant investments in preserving affordable housing; detailed knowledge of local issues and local resources
Chris Lepe, Transform	GCC member, working actively in Silicon Valley to build equitable TOD
Amie Fishman, East Bay Housing Organizations	Strong connections to stakeholders in San Jose, Fremont; experience convening groups around need for affordable housing preservation
Alliance of Californians for Community Empowerment (ACCE)	Key partner to Public Advocates; very effective in organizing low-income resident voices
Karen Chapple, UC Berkeley	Leading academic expert on gentrification pressures on affordable housing in the Bay Area
Linda Wheaton, Housing and Community Development, State of California	Expert on State level policies, funding and financing mechanisms
Brian Prater, Low Income Investment Fund	TOAH Fund Manager, funding and financing expertise
Heather Hood, Enterprise Community Partners	Affordable housing planning and financing expertise, especially transit connection

The Team will also engage staff from the City of San Jose Housing Department and the City of Fremont in the Advisory Committee, as well as the third TBD jurisdiction.

CHPC is currently working for the City of San Jose to analyze the conversion risk of the City's affordable rental housing stock and develop strategies for preservation. Due to funding limitations, CHPC has not

focused on the impact of transit on at-risk properties. CHPC has discussed with San Jose housing officials the potential to combine their existing scope with the Preserving Affordable Housing near Transit project, and San Jose has indicated that it is very supportive of leveraging additional resources to achieve a broader set of outcomes. (See letter of support.)

The work already being conducted in San Jose will feed directly into the initial analysis under Task 3. Beginning Task 3 with San Jose will ensure that CHPC's work with San Jose will not be delayed and that the proposed project will have a head start on identifying best practices, strategies and tools for preservation in San Jose. This approach will effectively leverage as much as \$70,000 in additional funding, which San Jose has committed, and will allow the proposed project to undertake a deeper, more complex preservation analysis than would otherwise be possible.

Initial conversations with City of Fremont housing officials also indicate strong support for the Preserving Affordable Housing near Transit project. (See letter of support). Fremont has an impressive record of supporting affordable housing development and preservation, but lacks internal capacity for the kind of analysis outlined in this proposal.

H. How will the project be managed and implemented? What is the role of each partner on the project? What is their expertise and experience? (500 words maximum)

Reconnecting America will be the project manager. RA will manage the budget and schedule, coordinate meetings, and will lead mapping and preservation need analysis. RA's team will be managed by Program Associate Elizabeth Wampler with CTOD Director Abby Thorne-Lyman. Chief-of-Staff Allison Brooks will play an advisory role. CHPC will partner closely with RA on data collection, housing policy analysis, preservation strategies and interventions, and the creation of the Preservation Toolkit. CHPC's team will be led by President & CEO Matt Schwartz and Housing Preservation Manager Nadia Shihab who will coordinate the work of CHPC staff as needed.

Reconnecting America is a national nonprofit working to integrate transportation systems and the communities they serve to provide connectivity and livability for all Americans. RA's goal is to generate lasting public and private returns, improve economic and environmental efficiency, and give consumers more transportation and housing choices. RA works with cities and regional agencies across the country, supporting equitable decision-making and investment in transit-rich neighborhoods through technical assistance.

RA recently completed the report "Preservation in Transit-Oriented Districts: A Study on the Need, Priorities, and Tools in Protecting Assisted and Unassisted Housing in the City of Los Angeles." RA worked in close collaboration with the City of Los Angeles Housing Policy and Planning Division to identify transit-oriented districts that are priorities for affordable housing preservation based on an empirical approach. Abby Thorne-Lyman was the project lead on this report.

Staff at RA are national experts in equitable TOD. Elizabeth Wampler provides technical assistance to jurisdictions across the country on integrating equity and affordable housing considerations into TOD plans. Prior to joining RA, Ms. Wampler conducted research assessing neighborhood change. Allison Brooks was one of the founders of the Great Communities Collaborative and a key player in the creation of the Transit-Oriented Affordable Housing Fund in the Bay Area.

Since its creation in 1988, CHPC has worked with more than 200 nonprofit and government organizations to create, green, and preserve more than 16,000 rental homes affordable to low income households in California. CHPC manages a database of all subsidized affordable properties in the state with regularly updated information from HUD and state agencies on the financing, ownership, and physical condition of these properties. CHPC uses this database to provide risk-assessment for local governments as well as non-profit developers committed to preservation. CHPC is recognized by HUD and state HCD as a national leader in affordable housing finance and preservation and conducts trainings for HUD and CA HCD stakeholders on these topics.

Each member of CHPC staff brings a deep commitment to the organization's mission and an average of fifteen years of experience in the development, financing, and advocacy in support of the preservation, and expansion of affordable homes for lower income Californians. CHPC President & CEO Matt Schwartz is an active member of the National Affordable Housing Preservation Working Group and consults regularly with top officials at HUD on affordable housing preservation policy and funding. Nadia Shihab has managed work with CHPC's partners since 2009.

I. How will the proposed project build capacity at the local, sub-regional and/or regional level? (200 words maximum)

The regional spatial analysis of the location of at-risk properties in relation to transit, PDAs, and Communities of Concern and the Preservation Toolkit will serve as a reference for local and regional agencies and governments throughout the Bay Area to guide housing preservation policy and planning.

Specifically, the analysis will support San Jose, Fremont, and one other jurisdiction in aligning and augmenting tools for the preservation of affordable housing, identifying specific locations at risk for displacement and loss of affordability, and evaluating the vulnerability of communities due to planned infrastructure investments.

The recommendations to local governments and Toolkit will support jurisdictions throughout the region that face similar challenges in preserving affordable housing around transit while aiding the local housing staff of the cities included in the report in identifying key areas of concern, specific at-risk properties, and new policy interventions.

The study will help foster the vision of shared goals for affordable housing preservation among the various cities, counties, and regional agencies involved in land use planning and housing policy along the BART to San Jose corridor. The third selected community may augment this vision for the same corridor, or a different existing or planned transit corridor in the region.

Preserving Affordable Housing near Transit: Scope of Work and Budget

December 13, 2012

Task	Description and Timeframe	Deliverable	Budget*
Task 1. Advisory Committee Working Sessions and Regular Meetings with Regional Prosperity Plan Working Groups	Convene advisory committee. <i>Within first month.</i>	Share and revise (if necessary) work approach with Advisory Committee and three working groups for the Regional Prosperity Plan.	\$ 4,183
Task 2. Regional Scan	<i>Months 1-3</i>		\$ 11,947
	Task 2a. Regional mapping and analysis. <i>Months 1-2</i>	Regional maps and explanatory memo.	\$ 7,842
	Task 2b. Identify third pilot community <i>Month 3</i>	Identify third local partner to work with under Task 3.	\$ 4,105
Task 3. Local Technical Assistance and Implementation	The team will work in partnership with three cities to support them in preserving affordable housing. The team will engage local jurisdiction staff, stakeholders, and leaders four key questions, and conduct mapping, policy analysis, and work to implement recommendations.		\$ 33,193
	<i>Month 4</i>	San Jose Approach	\$ 2,593
	<i>Month 4-6</i>	San Jose Memo and Maps	\$ 8,471
	<i>Month 6</i>	Fremont Approach	\$ 2,593
	<i>Month 6-8</i>	Fremont Memo and Maps	\$ 8,471
	<i>Month 8</i>	Local Partner 3 Approach	\$ 2,593
	<i>Month 8-10</i>	Local Partner 3 Memo and Maps	\$ 8,471
Task 4. Preservation Toolkit	<i>Month 10-12</i>	Preservation Toolkit	\$ 8,781
Task 5: Project Management and Coordination	<i>Quarterly, invoices with deliverables.</i>	Invoices, quarterly progress reports	\$ 4,591
Direct Costs	1. Printing meeting materials, 20 copies each for 12 meetings @ \$0.10 per copy	Meeting materials for 6 Advisory Committee Meetings and 6 in-depth meetings with City staff	\$ 360
	2. Travel Costs	Estimated for travel to/from meetings with city staff	\$ 240
	3. Food for 15 people per meeting for 6 meetings @ \$10 per person	Food for 6 Advisory Committee Meetings	\$ 900
	4. Stipend for City staff and Advisory Committee member participation, as necessary	\$1000/jurisdiction for time to participate in meetings	\$ 4,000
TOTAL			\$ 68,194

Preserving Affordable Housing near Transit: Scope of Work and Budget

December 13, 2012

<i>Staff Name / Role</i>	<i>Billing Rate*</i>	<i>Total Hours on Proposed Project</i>
Allison Brooks, Project Advisor	\$ 110.83	36
Matt Schwartz, Project Advisor	\$ 195.00	18
Elizabeth Wampler, Project Management and Spatial Analysis	\$ 45.20	354
Abby Thorne-Lyman, Policy and Spatial Analysis	\$ 78.74	212
Nadia Shihab, Policy Analysis and Preservation Toolkit	\$ 165.00	100
CHPC Policy Associate, Policy Analysis and Preservation Toolkit	\$ 125.00	48

*Billing rate should include indirect and overhead costs.

December 12, 2012

Alison Brooks, Chief of Staff
Reconnecting America
436 14th St., Suite 1005
Oakland, CA 94612

RE: Support for Application for MTC Housing the Workforce Sub-Grant to
Preserve Deed Restricted Affordable Housing in the BART to San Jose Corridor

Dear Ms. Brooks.

I am writing at the request of the California Housing Partnership Corporation (CHPC) to support your joint application for a sub-grant from the MTC Bay Area Regional Prosperity Plan "Housing the Workforce Sub-Grant" in order to work with the cities of San Jose and Fremont to preserve existing deed restricted housing in the BART to San Jose transit corridor.

Since the City Council took action to create a Department of Housing in 1987, the City of San Jose has been a leader in the affordable housing field, creating more than 18,000 new housing opportunities for San José residents. In recent years, CHPC has provided the City and its partners with information and technical assistance related to preserving at-risk federally assisted multifamily housing.

The City of San Jose Housing Department selected CHPC this year in response to a Request for Proposals specifically to assist us to preserve our at-risk subsidized housing portfolio, which is especially critical during this period of scarce funding for affordable housing. After an initial review of the scope of work you are proposing under the Workforce Sub-Grant, we believe that the scope of our preservation work with CHPC and your preservation work with CHPC focused in the BART to San Jose corridor will be complimentary and will enable us to collectively leverage greater resources by working together.

The City is confident that CHPC, in partnership with Reconnecting America, is uniquely qualified to undertake the preservation risk assessment, regional analysis and other related tasks that are included in the scope of services for this RFP.

Sincerely,



Leslye Corseglia
Director of Housing

cc: Matt Schwartz, California Housing Partnership Corporation



*Community Development Department
Planning*

39550 Liberty Street, P.O. Box 5006, Fremont, CA 94537-5006
510 494-4440 *ph* | www.fremont.gov

December 12, 2012

Alison Brooks, Chief of Staff
Reconnecting America
436 14th St., Suite 1005
Oakland, CA 94612

**RE: Support for Application for MTC Housing the Workforce Sub-Grant to
Preserve Deed Restricted Affordable Housing in the BART to San Jose Corridor**

Dear Ms. Brooks:

I am writing at the request of the California Housing Partnership Corporation (CHPC) to support your joint application for a sub-grant from the MTC Bay Area Regional Prosperity Plan "Housing the Workforce Sub-Grant" in order to work with the cities of San Jose and Fremont to preserve existing deed restricted housing in the BART to San Jose transit corridor.

The City of Fremont has been a leader in the affordable housing field, creating more than two thousand new housing opportunities for our residents. After an initial review of the scope of work you are proposing under the Workforce Sub-Grant, we believe that the scope of your preservation work with CHPC focused in the BART to San Jose corridor will be complementary to our own work and will enable us to collectively leverage greater resources by working together. The work product will also be helpful to the City of Fremont in development of its next Housing Element.

The City is confident that CHPC, in partnership with Reconnecting America, is uniquely qualified to undertake the preservation risk assessment, regional analysis and other related tasks that are included in the scope of services for this RFP.

Sincerely,

Jeff Schwob, AICP
Community Development Director

cc: Matt Schwartz, California Housing Partnership Corporation



Building & Safety
510 494-4400

Engineering
510 494-4700

Housing & Redevelopment
510 494-4500

Planning
510 494-4440