



Date: September 18, 2002
To: Inter-Regional Partnership Members
From: IRP Staff
RE: RFP & Zone Tracking/Evaluation Mechanism

Background

The Inter-Regional Partnership (IRP) enabling legislation requires that a process be set up to evaluate the progress of the Inter-Regional Partnership State Pilot Project. This report identifies what is required by the state and introduces a draft RFP that fulfills those requirements.

IRP Pilot Project Evaluation RFP

State law stipulates that the IRP designate a “qualified consultant to conduct an evaluation of the pilot project.” The legislation further directs that ongoing monitoring and evaluation be conducted throughout the implementation of the project. According to the state, the “evaluation shall assess the gap between jobs and housing by comparing the ratio between the number of jobs and the number of housing units in a local jurisdiction with a designated IRP Jobs/Housing Opportunity Zone, before an opportunity zone project has been approved and after it has been completed.”

At the last IRP meeting, staff was directed to prepare a draft request for proposal (RFP) to begin the process of hiring a qualified consultant to complete the IRP project evaluation. Attached is a working draft RFP for the IRP’s consideration. The RFP includes background information on the IRP program, including a listing of the 10 Zones, and a description of the work to be performed. The budget for the project evaluation is \$50,000.

Zone Tracking

A key element to the final evaluation of the Pilot Project will be how well the Zones meet their goals. The collective accomplishment of goals and the Zone’s cumulative impact will be the measure of success for the IRP Pilot Project. To measure this success, ongoing monitoring of the Zones, as required by the state, will be necessary. This monitoring will help the IRP determine how the Zones (and the project) perform in meeting their jobs/housing balance goals.

Staff has developed a tracking tool for use as a starting point for discussion by the IRP. (*See Attachment 1 to the Draft RFP*) Once finalized, the tracking tool will be an attachment to the RFP to give potential consultants an understanding of the type of data necessary to perform the project evaluation. It is anticipated that staff will work with the consultant, once they are selected, to refine this tracking tool.

Data to Track

The basic subject areas for tracking and evaluating the Zones are based on the program objectives agreed to by the IRP. The matrix (at the back of the Draft RFP) contains the base information for most of the tracking/evaluation components. Staff from each council of governments will research all base values that were not available during the RFP process. The subject areas are as follows:

- Jobs/housing balance

- Transportation
- Air Quality
- Development
- Quality of life

Jobs/Housing Balance

Balancing jobs and housing within the five county region is one of the primary objectives of the IRP. It is proposed that the impact that development of the Zones has on jobs/housing balance for the region be based on two factors: 1) the raw jobs/housing numbers for the Zone jurisdiction(s) and 2) the number of local residents working in the Zone and/or the number of workers who moved to be closer to where they work.

The raw jobs/housing numbers can be determined from jurisdiction reports to State agencies. The number of jobs generated in a Zone can be determined by Employment Development Department updates. In turn, the number of building permits reported to the California Industrial Research Bureau could be used to determine the number of housing units created in a Zone.

The number of local residents working in the Zone, and/or the number of workers who moved to be closer to where they work, was added to the evaluation to expand on the raw jobs/housing numbers. During the evaluation process there were several jurisdictions that stated that they had a balance of jobs to housing, however, there was a mismatch between the skill set of their residents and the jobs that were available.

At a minimum, it is proposed that the raw jobs/housing numbers should bring the Zone jurisdiction(s) twenty percent closer to the ideal jobs/housing balance of 1.5 jobs per household compared to their original ratio.

IRP members have frequently cited the importance of matching jobs and housing with the skills and incomes of area residents. Staff recommends, for discussion by the IRP, a proposal that would base the evaluation of this component of the jobs/housing balance requirement on a goal that a minimum of fifty percent of the workers in the Zones be local residents, or workers who moved to be closer to their jobs.

The percentage of housing units that are designated as affordable can be an important component of evaluating housing development within the Zones. It is proposed that the evaluation of housing within the Zones be based on designating a higher percentage of affordable units than state law requires.

Transportation

It is proposed that the evaluation of the transportation effects of Zone development be based on the level of service ratings for highway traffic for the county where the Zone is located. The evaluation would compare the level of service before the Zone designation with the level of service at the end of the pilot project period.

Sustainable transportation is another program objective of the IRP. Staff proposes that the evaluations include the number and types of transit routes serving the Zone. Particular attention should be paid to whether or not transit serving the Zones provides direct connections to inter-regional transit systems. There is also the potential that the evaluation could identify the percentage of residents and/or workers who utilize public transit, or other alternative transportation, to commute.

Air Quality

Evaluation of the air quality impacts of Zone development may be difficult depending on when county air quality districts update their reports in relation to the IRP evaluation deadline. County air quality reports

from before and after Zone development can be compared to judge the air quality impacts of Zone development. As an alternative, COG staff could work with county air district staff to model air quality impacts based on information gathered for other sections of the evaluation.

Development

As part of the RFP process, Zones were to be developed within five years. To track this, staff recommends that the evaluation include the percentage of development that is completed by January 1, 2004. A proposal for IRP discussion is that this part of the evaluation be based on a goal of a minimum of twenty percent of the Zone being developed within this time period.

Quality of Life

The evaluation of the quality of life impacts of Zone development can be extrapolated from the data collected from the other sections of the evaluation. It is proposed that a narrative evaluation summarizing the overall impacts of the other sections be used to determine how each Zone has addressed this issue.

Requested Action

1. Discuss the draft request for proposals for a consultant to prepare an evaluation of the IRP Pilot Project. Direct staff to make changes as necessary.
2. Discuss the proposed zone tracking/evaluation tool and give staff direction for further development.

| Proposal | Projected Commercial Space (Sq. Ft.) | Projected Commercial Type | Projected Jobs | Projected Housing (total) | Projected Housing Type | Existing Jobs/Housing Balance | Projected Buildout | Percent of Development Completed | Actual Number of Jobs Created | Actual Number of Housing Units Constructed | Percent of Affordable Housing |
|------------------------------------|--------------------------------------|---------------------------|----------------|---------------------------|------------------------|-------------------------------|--------------------|----------------------------------|-------------------------------|--|-------------------------------|
| Alameda County | | | | | | | | | | | |
| Dublin Transit Center | 430,000 | Office | 1,414 | 1,500 | Multi-family | 2.29:1.0 | 2007 | | | | |
| | 70,000 | Retail | 233 | | | | | | | | |
| San Lorenzo Village | 10,000 | Office | 33 | 500 | Multi-family | *** | 2006 | | | | |
| | 120,000 | Retail | 400 | 140 | Townhomes | | | | | | |
| | 38,000 | Community/Library | | 100 | Live/Work Senior | | | | | | |
| | | | | 100 | | | | | | | |
| Union City Intermodal Station Area | 1,120,000 | Office | 4,480 | 128 | Single family | 1.0:1.0 | 2022 | | | | |
| | 1,126,800 | R&D | 3,415 | 138 | Townhomes | | | | | | |
| | 100,000 | Retail | 222 | 232 | Multi-family | | | | | | |
| | | | | 469 | Undetermined | | | | | | |
| Contra Costa County | | | | | | | | | | | |
| Antioch-Brentwood | 2,400,000 | Office/Light Industrial | 6,800 | 0 | N/A | 0.6:1.0 | 2011 | | | N/A | N/A |
| | 1,740,000 | Retail | 3,500 | | | | | | | | |
| Antioch-Oakley | 6,000,000 | Office/Light Industrial | 17,511 | 184 | Single family | 0.56:1.0 | 2011 | | | | |
| | 512,000 | Retail | 1,024 | | | | | | | | |
| San Joaquin County | | | | | | | | | | | |
| Tracy Gateway Business Park | 5,340,000 | Office | 24,130 | 0 | N/A | 1.0:1.0 | 2011 | | | N/A | N/A |
| | 220,000 | Retail | 1,119 | | | | | | | | |
| | 220,000 | Other (Hotel & Golf) | 463 | | | | | | | | |
| Airport East | 2,875,852 | Office/R&D | 8,714 | 0 | N/A | 1.0:1.0 | 2019 | | | N/A | N/A |
| | 2,516,505 | Warehouse/Delivery | 2,014 | | | | | | | | |
| | 221,677 | Retail | 521 | | | | | | | | |
| | 954,644 | Flex (W/D) | 1,272 | | | | | | | | |
| | 572,793 | Flex (R&D) | 1,273 | | | | | | | | |
| Santa Clara County | | | | | | | | | | | |
| Milpitas | 720,000 | Office | 2,368 | 4,860 | Multi-family/Live-Work | 3.0:1.0 | 2011 | | | | |
| | 15,000 | Retail | 50 | | | | | | | | |
| Stanislaus County | | | | | | | | | | | |
| Patterson - Sperry Rd/I-5 | 1,211,000 | Warehouse/Delivery | 10,000 | 0 | N/A | *** | *** | | | N/A | N/A |
| | 810,000 | Light Industrial | | | | | | | | | |
| | 500,000 | Flex | | | | | | | | | |
| Modesto - Kansas Avenue | *** | *** | 1,500 | 0 | N/A | 1.28:1.0 | 2007 | | | N/A | N/A |
| Totals: | 29,844,271 | | 92,457 | 8,351 | | | | | | | |

*** - Staff follow-up required

N/A - Not applicable

| Proposal | Number and Percent of Local Residents Employed in Zones | Number of Workers Who Moved to be Near Jobs | Final Jobs/Housing Balance | Pre-/Post-Zone Highway Level of Service (LOS) Ratings | Number of Transit Routes Within Opportunity Zone | Direct Transit Connection to Inter-Regional Transit Systems | Zone Connection to Bike/Pedestrian Networks | Pre-/Post-Zone Air Quality Status |
|------------------------------------|---|---|----------------------------|---|--|---|---|-----------------------------------|
| Alameda County | | | | | | | | |
| Dublin Transit Center | | | | | | | | |
| | | | | | | | | |
| San Lorenzo Village | | | | | | | | |
| | | | | | | | | |
| Union City Intermodal Station Area | | | | | | | | |
| | | | | | | | | |
| Contra Costa County | | | | | | | | |
| Antioch-Brentwood | | | | | | | | |
| | | | | | | | | |
| Antioch-Oakley | | | | | | | | |
| | | | | | | | | |
| San Joaquin County | | | | | | | | |
| Tracy Gateway Business Park | | | | | | | | |
| | | | | | | | | |
| Airport East | | | | | | | | |
| | | | | | | | | |
| Santa Clara County | | | | | | | | |
| Milpitas | | | | | | | | |
| | | | | | | | | |
| Stanislaus County | | | | | | | | |
| Patterson - Sperry Rd/I-5 | | | | | | | | |
| | | | | | | | | |
| Modesto - Kansas Avenue | | | | | | | | |
| Totals: | | | | | | | | |

*** - Staff follow-up required

N/A - Not applicable