

**Date:** November 20, 2002  
**To:** Inter-Regional Partnership Members  
**From:** IRP Staff  
**RE:** Program Evaluation Request for Proposal

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## Background

This report notes changes that were made to the draft request for proposal (RFP) originally submitted to the Inter-Regional Partnership (IRP) for evaluation at their September 18, 2002 meeting. This report also requests that the IRP approve the RFP for release to the public. Allowing for a 45-day response time, responses to this RFP will be due on January 7, 2002.

## Discussion

The originating state IRP legislation requires that the IRP hire a “qualified consultant” to evaluate the success of the IRP Pilot Project. To meet this requirement, a draft RFP was presented to the IRP for review at their September 18, 2002 meeting.

At their September meeting, IRP members suggested a minor modification to the draft RFP. That modification was to the measure of transportation impacts of development in the Zones. The RFP had included a measure of Level of Service to gauge traffic impacts. The IRP recommended that staff consult with Congestion Management Agency staff to determine a more appropriate measure for traffic impacts. CMA staff concurred that LOS was not appropriate measure. Staff is continuing to work with CMA staff to find an acceptable traffic impact measure.

Considering the challenge of measuring inter-regional transportation impacts from the proposed development projects associated with the ten Zones, this measure will be left out of the RFP. The consultant eventually hired to perform the program evaluation will be asked to work with staff to devise an appropriate measure.

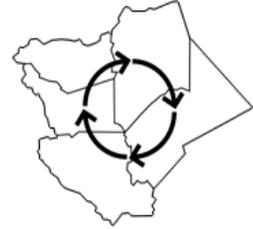
The basic subject areas for tracking and evaluating the Zones remain the same as presented in the draft RFP and are based on the program objectives agreed to by the IRP. Attachment One of the RFP is a comprehensive matrix, which contains the base information for most of the tracking/evaluation components. Staff from each council of governments will research all base values not requested from project proponents as part of the RFP process. The subject areas are as follows:

- Jobs/housing balance
- Transportation
- Air Quality
- Development
- Quality of life

## Requested Action

Staff requests that the IRP members :

1. Discuss the proposed request for proposals for the Pilot Project Evaluation
2. Request changes or modifications to the draft RFP.
3. Approve the release of the RFP on November 22, 2002 with modifications (if any). Responses to the RFP will be due on January 7, 2003.



November 20, 2002

## **Inter-Regional Partnership Jobs/Housing Balance Pilot Program Evaluation Request for Proposals**

### **Background**

The Inter-Regional Partnership (IRP) was convened in 1998 to establish a framework that allows local policy makers to address the interrelationships between future jobs/housing balance, and the concurrent impacts on transportation and air quality in two separate, yet economically linked regions, the San Francisco Bay Area and the Central Valley. Fifteen elected officials, representing five counties-Alameda, Contra Costa, San Joaquin, Santa Clara, and Stanislaus-joined forces to pursue a number of programs and actions to improve inter-regional cooperation on transportation and growth-related issues. Three council of governments (COGs)- the Association of Bay Area Governments, the San Joaquin Council of Governments and the Stanislaus Council of Governments -provide staffing, financial support and regional expertise to the IRP.

In establishing its program objectives, the IRP members agreed upon a number of goals, including:

- Achieve a more equitable jobs/housing balance.
- Improve transportation and air quality.
- Enhance the quality of life throughout the five county region.
- Pursue inter-regional economic development opportunities.
- Establish more sustainable methods of moving people between their homes and distant jobs.

### **IRP Pilot Program**

Since the IRP's inception, significant progress has been made on the first of these goals, to achieve a more equitable jobs/housing balance. State legislation was passed in the summer of 2000 that created the IRP Jobs/Housing Balance Improvement Project. It was established as a "pilot" project to determine whether or not the placement of jobs and/or housing could be influenced through the use of focused economic development and housing related incentives.

The specific goals of the IRP Jobs/Housing Balance Improvement Project, as stated in the legislation, are to:

- Encourage economic investment, including job creation, near available housing.
- Encourage housing to be located near major employment centers.
- Encourage development along corridors served by transit and near transit stations.
- Encourage more sustainable and effective transportation between job and housing centers.

To meet these goals, ten Jobs/Housing Opportunity Zones (Zones) have been designated in the IRP region (defined as the five participating counties). Each Zone has specific jobs/housing balance related goals and

a description of the type of actions necessary to attain these goals, including recommended state, regional, and locally sponsored incentives. (See Table 1 for a detailed listing of the ten Zones.)

The incentives are intended to encourage development that will meet the jobs/housing balance goals of the individual Zones and the IRP region. The incentives may vary by Zone location and type. For example, Zones located near employment centers or with good transit access to employment may receive incentives designed to promote reasonably priced housing development. In contrast, Zones in a jurisdiction with a significant supply of housing and in the need of jobs, may need incentives related to infrastructure development.

Incentives being sought for the Zones through legislative and administrative changes to state programs include:

- Tax Increment Financing
- Enterprise Zones
- Housing Tax Credits
- Priority in State Bond Allocations
- Childcare Assistance

Table 1. Jobs/Housing Opportunity Zones

Proposal	Projected Jobs	Projected Housing Units
<b>Alameda County</b>		
Dublin Transit Center	1,414 office 233 retail	1,500 multi-family 0 units
San Lorenzo Village	33 office 400 retail	840 units
Union City Intermodal Station Area	4,480 office 3,415 r&d 222 retail	967 units
<b>Contra Costa County</b>		
Cities of Antioch & Brentwood	6,800 office/light industrial 3,500 retail	0 units
Cities of Antioch & Oakley	17,511 office/light industrial 1,024 retail	184 units
<b>Santa Clara County</b>		
City of Milpitas	2,368 office 50 retail	4,860 units
<b>San Joaquin County</b>		
City of Tracy: Tracy Gateway Business Park	24,130 office 1,119 retail 463 other (hotel/golf)	0 units
County of San Joaquin: Airport East	9,987 office/r&d 3,286 warehouse/delivery 521 retail	0 units
<b>Stanislaus County</b>		
County of Stanislaus (Patterson)	10,000 warehouse/delivery & light industrial	0 units
City of Modesto	1,500 jobs	0 units

## Program Evaluation

The State mandates that the Jobs/Housing Balance Improvement Project be evaluated by “a qualified consultant.” According to the legislation, the evaluation shall consist of ongoing monitoring and a final evaluation of the project. The final evaluation is to be based on the progress of the individual developments within each Zone and how that progress relates to the overall goals of the pilot program.

### **Work to be Performed**

As the lead agency in the IRP State Pilot Project, the Association of Bay Area Governments seeks professional planning services to accomplish the following:

#### Research

1) Monitor the progress of the development projects within each of the Jobs/Housing Opportunity Zones. Zones should be monitored using the criteria and data sheet attached to this RFP. (See Attachment 1) The applicant may wish to refine this data sheet to meet this RFP’s objectives. At a minimum, the following information for each Zone should be tracked and included in all final written documents submitted to the IRP:

- The jobs/housing ratio at the beginning and the end of the pilot project for the jurisdiction a Zone is located.
- The number of direct jobs generated by the Zone at the end of the pilot project at projected at full build out.
- The number of housing units constructed and permitted in the Zone, including total affordable units by the end of the pilot project.
- The numbers of local residents working in the Zone by the end of the pilot project and projected at full build out.
- The number of residents who changed jobs to work in the Zone by the end of the pilot project and projected at full build out .
- The number and types of transit routes projected to serve the Zone.
- Percent of residents and/or workers in Zone who currently and are projected to utilize public transit, or other alternative (non single occupancy vehicle) transportation, to commute.
- Percentage of development completed by January 1, 2004
- Number, and type, of incentives the Zones were able to utilize.
- Infrastructure improvements made in zone and capital required to complete improvements.

*(Note: ABAG staff will supply selected consultant with all base data and materials to begin research endeavor)*

#### Required Meetings

1) Attend Inter-Regional Partnership meeting as requested by the IRP Staff (i.e. when issues applicable to the RFP and the selected consultant are to be acted on.) Meetings are generally held on the third Wednesday of every other month (bimonthly). Schedule may change at the discretion of the IRP. Meeting locations vary.

#### Written Products

1) Prepare a final written evaluation of the IRP pilot project. Evaluation should contain a discussion of each of the data items gathered during the research stage of the project evaluation. In particular, the consultant will be asked to include information on:

- The goals of each Zone as detailed in each Zone’s application or as determined through interviews with each Zone applicant.
- The implementation plan for the development of each Zone as prepared by the Zone applicant.
- The cumulative impact, including air quality impacts, of the development of all the Zones on the IRP region as determined through research prepared by consultant.

- A description of any external factors that may have affected the process of carrying out the planned actions to remedy the jobs/housing imbalance.
  - The number of building permits issued in the Zone, as provided by the California Industrial Research Bureau.
  - The number of jobs generated in the Zone, as determined by the Employment Development Department.
  - Percent of Zone development completed by January 1, 2004.
  - Number of local residents hired to fill job positions in the Zones and/or the number of local workers who moved to a Zone location to be closer to their jobs.
  - Number, and type, of incentives the Zones were able to utilize.
  - Percent of residents and/or workers in Zone who utilize public transit, or other alternative transportation, to commute.
  - Percent, and number, of affordable housing units created.
  - A description of any additional data used to evaluate the jobs/housing imbalances.
  - An assessment of jobs/housing balance. This section should include detailed information on 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. The comparison shall be based on an optimum balance of jobs and housing being one and one-half jobs for one housing unit, as determined by the Department of Finance.
- 2) The final report shall be submitted to the IRP on or before March 31, 2004.

### **Budget**

The Inter-Regional Partnership has allocated **\$50,000** toward completing the state mandated IRP Pilot Project evaluation.

### **Request for Proposals**

ABAG invites the submittal of proposals outlining the steps your agency will take to prepare the products outlined above. Please note relevant experience and projects that qualify you to be a strong candidate for this project. Include resumes of staff persons expected to work on the project and a budget approximating hours by task and an overall "not to exceed" price.

**All responses to this request for proposals are due on January 7, 2003.** Submit one (1) original proposal and three (3) copies to the Association of Bay Area Governments at:

The Inter-Regional Partnership  
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