

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

This Agreement is made and entered into by and between the County of Lake, hereinafter referred to as “County”, and Placeworks, hereinafter referred to as “Contractor”, collectively referred to as the “parties”.

1. **SERVICES.** Subject to the terms and conditions set forth in this Agreement, Placeworks shall provide to County the services described in the Scope of Services attached hereto and incorporated herein as Exhibit B at the time and place and in the manner specified therein. In the event of a conflict in or inconsistency between the terms of this Agreement and Exhibit A – Scope of Services, Exhibit B – Placeworks Housing Action and Implementation Plan Proposal for Services, Exhibit C – Fiscal Provisions, and Exhibit D – Compliance Provisions, the Agreement shall prevail.

2. **TERM.** This Agreement shall commence on April 16, 2024, and shall terminate on April 16, 2025, unless earlier terminated as hereinafter provided. In the event County desires to temporarily continue services after the expiration of this Agreement, such continuation shall be deemed on a month-to-month basis, subject to the same terms, covenants, and conditions contained herein.

3. **COMPENSATION.** Contractor has been selected by County to provide the services described hereunder in Exhibit “B” (Scope of Services), attached hereto. Compensation to Contractor shall not exceed two hundred fifty-three thousand five hundred twenty dollars (\$253,520).

The County shall compensate Contractor for services rendered, in accordance with the provisions set forth in Exhibit “C” (Fiscal Provisions), attached hereto, provided that Contractor is not in default under any provisions of this agreement. Compensation to Contractor is contingent upon appropriation of federal, state and county funds.

4. **TERMINATION.** This Agreement may be terminated by mutual consent of the parties or by County upon 30 days written notice to Contractor.

In the event of non-appropriation of funds for the services provided under this Agreement, County may terminate this Agreement, without termination charge or other liability.

Upon termination, Contractor shall be paid a prorated amount for the services provided up to the date of termination.

5. **MODIFICATION.** This Agreement may only be modified by a written amendment hereto, executed by both parties; however, matters concerning scope of services which do not affect the compensation may be modified by mutual written consent of Contractor and County executed by Susan Parker.

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

6. **NOTICES.** All notices between the parties shall be in writing addressed as follows:

County of Lake  
Administration Department  
255 N. Forbes St.  
Lakeport, CA 95453  
Attn: Lisa Judd

Placeworks  
101 Parkshore Dr., Suite 200  
Folsom, CA 95630  
Attn: Jennifer Gastelum

7. **EXHIBITS.** The Agreement Exhibits, as listed below, are incorporated herein by reference:

- Exhibit A – Scope of Services
- Exhibit B – Placeworks Housing Action and Implementation Plan Proposal for Services
- Exhibit C – Fiscal Provisions
- Exhibit D – Compliance Provisions

8. **TERMS AND CONDITIONS.** Contractor warrants that it will comply with all terms and conditions of this Agreement and Exhibits, and all other applicable federal, state and local laws, regulations and policies.

9. **INTEGRATION.** This Agreement, including attachments, constitutes the entire agreement between the parties regarding its subject matter and supersedes all prior Agreements, related proposals, oral and written, and all negotiations, conversations or discussions heretofore and between the parties.

Executed at Lakeport, California on April 2024.

COUNTY OF LAKE

CONTRACTOR

\_\_\_\_\_  
CHAIR, Board of Supervisors

\_\_\_\_\_  
Placeworks

ATTEST:  
SUSAN PARKER  
Clerk to the Board of Supervisors

APPROVED AS TO FORM:  
LLOYD GUINTIVANO  
County Counsel

By: \_\_\_\_\_

By:  \_\_\_\_\_

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

**EXHIBIT “A” – SCOPE OF SERVICES**

**1. CONTRACTOR RESPONSIBILITIES.**

1.1 Completion of all elements (including all optional elements) of the Work Plan, as described beginning on labeled page number 3 of Placeworks’ “Housing Action and Implementation Plan Proposal for Services” (Exhibit “B” hereto, incorporated herein by reference)

1.2 Development of a comprehensive manual to include resources needed to carry out Action Steps. On written agreement of the County and the Contractor, this may be included in the Final Draft Plan.

**2. REPORTING REQUIREMENTS.** Contractor shall submit (quarterly, monthly) reports in a format approved by County by the 10<sup>th</sup> of the month following the report period.

**3. RECORDS RETENTION.** Contractor shall prepare, maintain and/or make available to County upon request, all records and documentation pertaining to this Agreement, including financial, statistical, property, recipient and service records and supporting documentation for a period of five (5) years from the date of final payment of this Agreement. If at the end of the retention period, there is ongoing litigation or an outstanding audit involving the records, Contractor shall retain the records until resolution of litigation or audit. After the retention period has expired, Contractor assures that confidential records shall be shredded and disposed of appropriately.

**4. COUNTY RESPONSIBILITIES.**

4.1 County staff shall meet with and communicate with the contractor as outlined in the work plan.

4.2 County will pay any fees for running the announcements in the newspapers, radio or other outlets for public meetings.



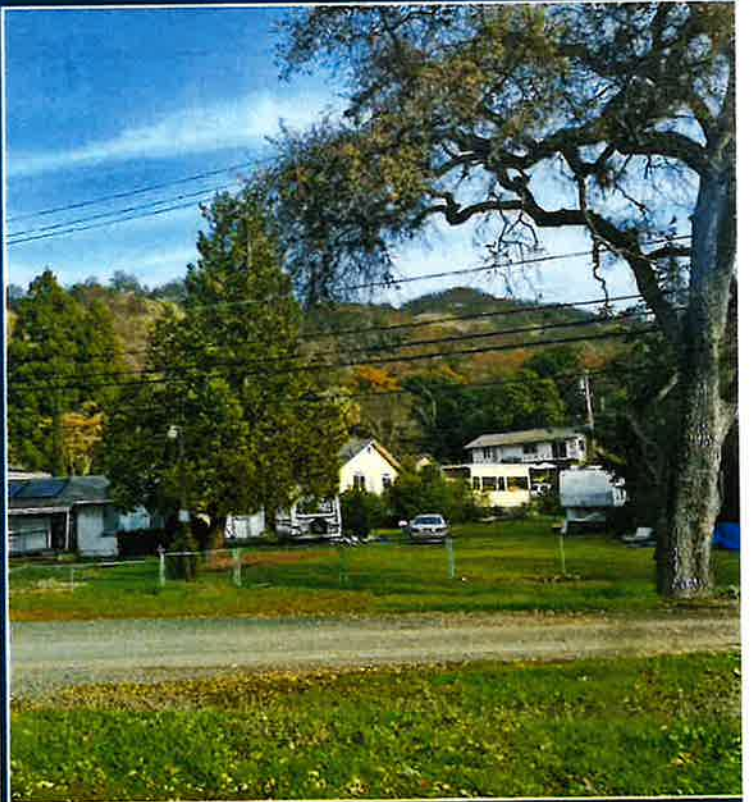
# Housing Action and Implementation Plan

**Proposal for Services** | February 15, 2024  
for Lake County





 PLACEWORKS





Proposal for Services | February 15, 2024

# Housing Action and Implementation Plan

for Lake County

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**Prepared by: PlaceWorks**

101 Parkshore Drive, Suite 200  
Folsom, California 95630  
t 916.245 7500

ORANGE COUNTY • BAY AREA • SACRAMENTO • CENTRAL COAST • LOS ANGELES • INLAND EMPIRE

**PLACEWORKS.COM**





February 15, 2024

Lisa Judd, Deputy County Administrative Officer II - Housing  
Lake County  
255 N. Forbes Street  
Lakeport, CA 95453

**Subject: Lake County Housing Action and Implementation Plan Proposal**

Dear Lisa:

Please accept the attached submittal as PlaceWorks' proposal to prepare the Housing Action and Implementation Plan (HAIP) for the County of Lake (County).

Similar to the approach that PlaceWorks' staff are currently implementing with the County's General Plan Update project, we will work as if we are an extension of County staff throughout the HAIP effort – meaning regular and structured communication, meaningful deadlines, and flexibility in approach. We offer the best team for this project. **Jennifer Gastelum**, principal-in-charge, and leader of PlaceWorks' housing team will oversee the project. **Amy Sinsheimer** and **Nicole West**, both seasoned housing professionals, will serve as project manager and assistant project manager, respectively. Amy and Nicole will serve as day-to-day contacts, with support from colleagues with expertise in housing policy, economics, community engagement, data analysis, mapping, and graphic design.

PlaceWorks is all about places and how they work geographically, environmentally, functionally, aesthetically, and culturally. We are also passionate about how we work with our clients. PlaceWorks brings people together from diverse practice areas, offering best-of-all-worlds capability and connectivity. Just as each place we work is distinctly different, so is our thinking.

Please do not hesitate to contact me if you need more information. The PlaceWorks team looks forward to continuing to work with you on achieving the County's goals.

We look forward to your response.

Respectfully submitted,

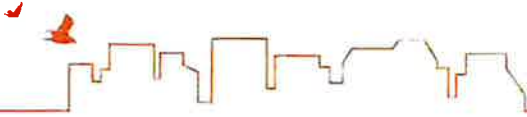
**PLACEWORKS**

A handwritten signature in blue ink, appearing to read 'Jennifer Gastelum', with a long horizontal line extending to the right.

Jennifer Gastelum  
Principal







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# 1. COMPANY PROFILE

## PlaceWorks

PlaceWorks is a 100 percent employee-owned planning, design, and environmental consulting firm, with approximately 140 employees in six offices. PlaceWorks serves both public- and private-sector clients throughout the state in the fields of comprehensive planning, environmental review, urban design, landscape architecture, community outreach, and Geographic Information Systems (GIS). Our talented, multidisciplinary team thrives on working with communities to tackle complex problems and develop workable solutions.

### Housing Services

PlaceWorks has provided housing services since 1988. We have prepared Housing Elements, analyses of impediments to fair housing, strategic plans, pro formas, housing demand studies, and technical assistance materials. We have provided affordable housing program development and management services. Our staff have prepared over 150 Housing Elements. We have extensive experience completing site inventory analyses where existing conditions are complex and challenging. PlaceWorks has also received numerous awards from the state chapter and local sections of the American Planning Association (APA).

Few firms can offer our breadth of services or the resume of awards that demonstrate our project innovation and quality. Whether the focus is on revitalizing corridors with housing, incorporating an economic perspective into land use decisions, or integrating principles of fair housing and community health in plans and policies, we integrate this expertise into our housing plans.

Our housing philosophy is rooted in the belief that the housing we reside in and the neighborhoods where we live are fundamental to our communities and the quality of life offered to residents and the workforce. Successful communities are those that can embrace the value of housing and neighborhoods and can develop innovative programs to support housing.

### Economic Services

PlaceWorks grounds its economic development work in a thorough analysis and understanding of the economic and market forces underlying each project that we undertake. We build on this analysis, applying experience and knowledge of what works as well as novel approaches. At the heart of what PlaceWorks does is the “so what?” factor—what does all this mean, what do we do about it? Our goal is to turn complex economic and market data into effective action for our clients.

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#### Company Ownership

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Company Type:  
California C-Corporation

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#### Office Locations

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Los Angeles  
Santa Ana (headquarters)  
Chino Hills  
San Luis Obispo  
Berkeley  
Sacramento

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#### Primary Contact

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Amy Sinsheimer  
Senior Associate  
P.O. Box 1316  
San Luis Obispo, CA 93406  
805.295.1530 ext. 2602  
[asinsheimer@placeworks.com](mailto:asinsheimer@placeworks.com)

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Our economic services complement the work of the housing team. We are able to provide site selection and development feasibility studies, as well as cost estimating for a variety of housing program scenarios, including inclusionary and in-lieu fee programs, various types of construction projects, staff or consultant time for programming and amending housing regulations and lost revenue due to potential fee reductions.

PlaceWorks' economic development practice covers five key components. This first is economic development, focused on business retention and expansion, business attraction, and new business start-ups. The second is market analysis, quantifying the market demand for new development. Unlike the typical market study, focused on short-term demand over the next year or two, we specialize in long-term planning, the demand for new development over the short, mid, and long term, consistent with the time horizon for planning projects. The third is financial feasibility. We create and use detailed pro formas to refine development standards, evaluate and improve planning, policies, and provide a basis for regulations, such as inclusionary housing and public benefit requirements. The final component is implementation. This includes fiscal analysis that ensures policies and new development support the fiscal resiliency of our clients, tracking and feedback for our clients to effectively monitor progress towards planning goals, and funding and financing mechanisms that provide resources for proposed projects and programs.

## Community Outreach

Our projects involve more than just the creation and implementation of plans; they're opportunities to engage with stakeholders to create blueprints that reflect, and ultimately achieve, their aspirations. Developing and facilitating customized public engagement processes that elevate the public's involvement in the creation (and ownership!) of a project is a cornerstone of all our engagement work. PlaceWorks can help identify the most effective ways to engage with the stakeholders, including hard-to-reach populations. Our community-focused approach allows us to establish a thorough understanding of the key issues, opportunities, strengths, and challenges. Our team follows the practices of the International Association for Public Participation (IAP2), carefully tailored to each client, to create conversations that truly represent the breadth of voices in a community.

## Executive Summary

PlaceWorks offers the experience and skill of its housing team to administer housing and community development plans and programs, complete economic analyses, and to develop and implement grant-funded programs. Our team has worked with more than 100 agencies in California and we are excited to support the County in preparing and implementing the HAIP.

The subsequent chapters of this proposal include a discussion of our firm and staff qualifications, including links to work samples and written descriptions of relevant projects. We have also prepared a concise scope of work that explains how we will carry out each of the five major tasks listed in the County's Request for Proposals (RFP). A summary of this work program is presented in **Table 1**.

Our proposal also includes a proposed timeline for completion of the HAIP (**Figure 2**) and an estimated cost (**Table 2**).



## 2. WORK PLAN

This chapter describes the qualifications and experience of the staff who will work alongside the County in preparing the HAIP. This chapter also describes the scope of services to be completed by PlaceWorks.

### Staffing

PlaceWorks will oversee all aspects of the project to ensure its successful and timely completion. PlaceWorks has assembled a highly qualified team to complete this project. Resumes for the key staff identified in this chapter are included in **Appendix A** at the end of this proposal.

The organization of the team is shown graphically in **Figure 1**. In addition to staff named in this proposal, PlaceWorks has a deep bench of subject matter experts and highly skilled graphics, mapping, and document production professionals.

FIGURE 1 ORGANIZATIONAL CHART



### Jennifer Gastelum, Principal, Principal-in-Charge

Jennifer will serve as principal-in-charge and ensure that all products are produced on time and on budget and meet the highest standards of quality. She will facilitate public workshops and meetings. Jennifer has over 20 years of experience in housing programs and public outreach throughout California, Nevada, and Washington. As a recognized leader in the field, she has managed updates to over 100 Housing Elements since 2008. Her experience includes preparing United States Department of Housing and Urban Development (HUD) consolidated plans, action plans, analyses of impediments to fair housing choice, housing condition surveys, and housing market studies. Jennifer has significant experience overseeing grant management of state and federal programs, such as the Community Development Block Grant (CDBG) program, CALHOME, and HOME. Jennifer is committed to continuing education and training, and she has experience leading project management and business development training. Other project experience includes specific plans, general plans, environmental impact reports (EIRs), and Initial Studies (IS)/Negative Declarations (NDs).

## Amy Sinsheimer, AICP, Senior Associate, Project Manager

Amy will serve as the project manager and will be responsible for the day-to-day management of the project, as well as for maintaining regular contact with County staff, and overseeing the completion of all tasks in the scope of work. Amy has over 20 years of experience managing and preparing long-range planning and policy documents, with a specialty in housing. She has significant experience in public outreach for complex projects involving multiple agencies, stakeholders, and team members. Amy prepared housing elements during the 3rd, 4th, 5th, and 6th cycles and has worked closely with staff at the California Department of Housing and Community Development (HCD) to achieve certification for her clients. Amy has also prepared housing element program implementation documents. She also has comprehensive zoning code and General Plan Update experience.

## Nicole West, AICP, Senior Associate, Assistant Project Manager

Nicole has over 15 years of experience in planning, housing, and community development. She has managed dozens of Housing Element updates, ensuring that local jurisdictions meet the requirements of new State laws to achieve certification. She has managed several municipal affordable housing programs, providing program set-up, training, and ongoing management. She is experienced with various technical analyses, including disadvantaged unincorporated community analyses under Senate Bill (SB) 244 and public services needs assessments. She also has significant public outreach and stakeholder engagement experience.

## Steve Gunnells, Chief Economist

Steve's career spans the spectrum of community planning and economic development. As PlaceWorks' in-house economist, he plays a role in a great many of the firm's active projects. He focuses on crafting plans, policies, and development projects that are grounded in regional and global economic realities. He helps his clients leverage market forces to achieve their goals. Most importantly, he uses his grasp of economics and real estate markets not only to overcome existing challenges but to help communities create visionary plans that capitalize on the possibilities, not just past trends.

Steve works with communities to bridge the gap between long-range planning policies and economic development—with community organizations and special districts to fund and implement priority projects—and with developers to guide project decision making and obtain entitlements based on sound economic and market analysis. Steve has also served as the field director for a consulting team on a World Bank project in Yemen, an Economic Development Fellow with the International Economic Development Council, a County planning director in Virginia, and a planning and economic consultant in Michigan and Ohio. His current projects include an Inclusionary Housing Ordinance for the City of Fountain Valley and a Housing Study for the City of Menifee.

## Cory Witter, Senior Associate, Housing and Economics Specialist

Cory's background in public health and community-based participatory research lends him a unique perspective of the planning world. The wide variety of his project experience so far has contributed to his passion for long-range planning, economic development, and community engagement. He views planning dilemmas as an intersection of the social and physical environments and chooses to search for solutions



upstream rather than look downstream for solutions that may only topically address the problems. Cory is also venturing further into the world of land use economics. He is interested in economic growth and development—particularly with fitting all the pieces together so that cities can make land use decisions with lasting social and economic benefits.

### Allison Giffin, Associate, GIS and Data Management

Allison views planners as conveners and providers of tools and data to inform community-driven efforts. Allison has six years of professional planning experience managing, analyzing, and visualizing data as well as policy development and public outreach. At PlaceWorks, Allison manages data and mapping components of complex, multi-year planning projects like general plans and buildout analyses, transportation plans, Regional Housing Needs Assessments, and housing elements. She also manages standalone GIS projects, covering all aspects from client communication to methodology development and document production, and develops user-friendly web and mobile mapping applications to inform decision making and streamline planning processes. Allison is experienced with a variety of technical software programs and platforms, including GIS, Adobe Creative Suite, Python, and R.

### Lauren Willey, Associate, Outreach Specialist

Lauren enjoys a range of projects from climate action and adaptation planning to comprehensive planning. Her planning approach is driven by her desire to center residents in the planning process, especially those that have historically been excluded, and is informed by her interests in technical analysis and environmental design. Her work includes greenhouse gas inventories and forecasting, climate action planning, and comprehensive planning. Prior to joining PlaceWorks, Lauren performed research on community wildfire recovery, worked with the Parks and Recreation Department of San Francisco on equitable park planning, and supported the growth of micromobility programs in cities around the world.

### Angelica Garcia, Associate, Housing Specialist

Angelica has experience working on a wide range of planning projects, including general plans, neighborhood plans, community outreach campaigns, housing elements, objective design standards, and zoning code updates. She has over eight years of experience in the public and private sector and brings a wide variety of skills through her work experience and education. Her interest in urban planning stems from her desire to help create healthier communities. She enjoys working on plans that reflect the unique needs of each community. Angelica is currently the assistant project manager for the General Plan Update in Soledad, which began this year. She is also working on the General Plan Update for San Mateo, three neighborhood-focused Housing Action Plans for Stockton, and updating the Environmental Justice Elements for San Mateo County, City of Burlingame, and City of East Palo Alto. Angelica was on the PlaceWorks project management team for the Vacaville Housing Strategy.

### David Christie, Associate, Housing Specialist

David Christie is a skilled associate with significant experience creating comprehensive and specific plans. His work includes research and writing for general and specific plan updates and Housing Element updates. He has served as an extension of staff for the cities of Redlands, Needles, Grand Terrace, Fairfield, and San Jose,

acting as primary planner for complex industrial and residential projects, reviewing project plans, and managing the public counter. This experience with the public gives him a combined perspective on community outreach from the point of view of city leaders and department heads, planning consultants, and in-the-trenches counter staff. His background in planning was formed at the Southern California Association of Governments (SCAG), where he assisted with the preparation of the 2016–2045 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS).

## Scope of Work

To facilitate your review of this proposal, we have prepared a concise scope that emphasizes key components of our approach to this project.

We are flexible regarding the proposed scope of work and are happy to coordinate with you to prepare a final scope when we enter into a contract. We also recognize that it may be necessary to alter the scope as the project progresses and would be happy to work with you to ensure the successful completion of the project.

A summary of the work program is presented in **Table 1**.

<b>Table 1 Work Program Summary</b>	
<b>Task 1: Project Initiation and Management</b>	
1.1 Kick-off Meeting	1.3 Ongoing Project Management and Coordination
1.2 Data Collection and GIS Creation	
<b>Task 2: Community Partnership and Engagement</b>	
2.1 Community Engagement Plan	2.3 Smaller Community Meetings, Stakeholder Meetings, and Interviews
2.2 Public Meetings	2.4 Community Engagement Summary Memo
<b>Task 3: Analysis of Current Conditions</b>	
3.1 Current Conditions and Summary Report	
<b>Task 4: Housing Action and Implementation Plan</b>	
4.1 Gaps Analysis	4.4 Administrative Draft Plan
4.2 Goals and Strategies	4.5 Board of Supervisors Plan and Presentation
4.3 Action Steps and Resources	4.6 Final Draft Plan
<b>Task 5: Identification of Sites for Housing Development</b>	
5.1 Sites Inventory and Analysis	

### Task 1. Project Initiation and Management

In this task, PlaceWorks will initiate the project and provide ongoing project management throughout the project.

## 1.1 Kick-off Meeting

PlaceWorks will hold an online meeting with County staff to discuss the project, set expectations, review the scope of work and schedule, and discuss details of each task.

## 1.2 Data Collection and GIS Creation

To support Task 3 (*Analysis of Current Conditions*), PlaceWorks will assess resources that are already readily available and prepare a data needs list for information that will need to be requested from County staff and other entities. PlaceWorks will continue to track data as it is received and periodically send updated data requests to reflect remaining needs.

To support Task 5 (*Identification of Sites for Housing Development*), PlaceWorks will assess the GIS resources that have already been gathered for the County's General Plan Update. With assistance from County staff, PlaceWorks will identify and assemble other needed GIS data. The GIS database will be usable by County staff for future planning activities. Based on the RFP, we anticipate that the types of data listed below will be useful. Some of this data will be needed across the county and two incorporated cities, while some data, such as property ownership and development potential, may only be needed on a subset of parcels that have been identified during the sites analysis.

- Parcel data with zoning, General Plan Land Use Designation, actual uses, vacancy status, and development potential
- Environmental factors such as fire hazards, flooding, and wetlands
- Presence of potential health hazards, such as asbestos, lead-based paint, or harmful substances left from prior uses of the site
- Proximity and accessibility to utilities and infrastructure (roads, sewers, water)
- Proximity and accessibility to opportunities and services, such as schools, public transit, businesses, and parks
- Property ownership

## 1.3 Ongoing Project Management and Coordination

PlaceWorks will provide ongoing communication and coordination with County staff throughout the project, including virtual meetings, emails, and other communications to ensure timely delivery of all deliverables. Our budget includes time for bi-weekly check-in meetings for the first four months of the project, and monthly check-in meetings in the final four months thereafter.

### ***Task 1 Deliverables and Meetings:***

- » Kick-off meeting (virtual) with agenda, data needs list, and summary notes
- » GIS database
- » Twelve biweekly/monthly check-in meetings (virtual) with agendas and summary notes

## Task 2. Community Partnership and Engagement

PlaceWorks will develop and implement a program that effectively reaches key community partners, local professionals, and the broader community at large, with the goals of providing information and obtaining meaningful feedback.

## 2.1 Community Engagement Plan

At the outset of the process, PlaceWorks will prepare a Community Engagement Plan intended to ensure broad inclusion, particularly for hard-to-reach groups and special-needs populations, with special attention given to communicating information so it is accessible and easy to understand. PlaceWorks will start with the list of community partners noted in the RFP, leverage any relevant information from the General Plan Update outreach effort, and supplement it with additional ideas for engaging with local leaders, chambers of commerce and other business associations, service providers, community-based organizations, developers, homebuilders, realtors, and other key groups and individuals.

PlaceWorks will work with County staff to confirm the location of meetings in Tasks 2.2 and 2.3. Lake County encompasses a large geographic area; therefore, it will be important to have meetings at different locations, as well as virtual options, to allow the opportunity for members of the community from the different locations to provide input. We understand that the County seat is in Lakeport and that other significant population centers and gathering places include Clearlake and Middletown. We also will take into account the local planning areas that divide the county into eight areas, seven of which have an established town council while the eighth (Kelseyville) is currently working to establish one.

PlaceWorks will collaborate with County staff to compile contact information, identify dates and venues for meetings, and develop themes for presentations and questions for soliciting input. The Community Engagement Plan will establish an approach to the four public meetings in Task 2.2 and the smaller meetings and interviews in Task 2.3. PlaceWorks will tailor its approach to smaller group meetings and interviews by considering the preferences of target audiences, with the goal of fostering candid discussion. Where feasible, PlaceWorks will hold in-person group meetings to obtain as much input as possible at one event. However, smaller virtual meetings and individual interviews will be used when physical distance or other factors make them the best option.

## 2.2 Public Meetings

PlaceWorks will host four public meetings to hear how the public characterizes local housing conditions and to learn about participants' needs, concerns, perceptions, and opinions. PlaceWorks will provide information about a range of contemporary strategies to overcome housing barriers, spur the production of affordable and market-rate housing, and solicit feedback on the various strategies. We propose that three of the meetings are in person and one is virtual; however, we are flexible and willing to work with County staff to fine tune the approach.

To notify the public, PlaceWorks will produce flyers and announcements in English and Spanish. PlaceWorks staff can produce Spanish flyers and meeting announcements in-house, and the cost proposal reflects that already. However, any additional translation needs would require an outside vendor. PlaceWorks can coordinate translation services for any or all parts of the community engagement process. This may include translating meeting materials and/or providing live interpretation during meetings. We believe that effective outreach should be conducted in all languages that are commonly spoken in the community, ensuring that as many community members as possible feel welcomed into the engagement process. It is difficult to predict the extent of the translation needs. The cost proposal includes a \$3,000 contingency for translation services.

PlaceWorks will coordinate with County staff to use typical channels of communication including the local newspaper and prominent local online news outlets, radio, and social media. It is assumed that the County will pay any fees for running the announcements in newspapers, on the radio and other news outlets. It is assumed that the County will publish announcements using its social media profiles. PlaceWorks will host an online meeting registration system. Registrants will be asked if they would like to request live translation. As mentioned previously, a contingency is proposed in our budget in case such requests are received.

PlaceWorks will develop one set of materials in English that will be used at each public meeting. Materials will include sign-in sheets, an agenda, informational handouts, 24x36 printouts mounted on foam core (maps, information, and/or interactive activities), a PowerPoint presentation, and materials to document feedback from participants.

### 2.3 Smaller Community Meetings, Stakeholder Meetings, and Interviews

Based on the strategy established in Task 2.1, PlaceWorks will prepare for and host the types of meetings described. The proposed budget includes 20 meetings, as listed here. The costs for additional meetings for each of these types are included as optional tasks in the cost proposal.

- Four in-person and four virtual small community meetings (eight total)
- Three in-person and three virtual small-group stakeholder meetings with representatives with shared topics of interest (six total)
- Two in-person and four virtual one-on-one interviews (6 total)

Upon request from the County, PlaceWorks will host an online meeting registration system for the small community meetings. This is included as an optional task. Registrants will be asked if they would like to request live translation. A contingency in our budget is proposed in case such requests are received.

PlaceWorks will prepare flyers and announcements in English and Spanish for small community meetings and collaborate with County staff on the best channels of communication for these notifications. PlaceWorks will use the meeting materials from Task 2.2 for the meetings and interviews in this task, with modifications to be specific to each community or to the topics of interest for target audiences. PlaceWorks will refine themes for informational content and the questions that will be used for soliciting input.

### 2.4 Community Engagement Summary Memo

PlaceWorks will provide the County with a memo that summarizes the results of Tasks 2.2 and 2.3. The memo will describe the events, document the feedback that was given, and explain how it will be incorporated into the process. PlaceWorks will revise the memo based on one round of administrative review by County staff. The summary memo will be an appendix to the Housing Action and Implementation Plan.

#### *Task 2 Deliverables and Meetings:*

- Stakeholder contact list
- Community Engagement Plan (administrative draft and final)
- Meeting materials, tailored to each meeting type:
  - » Flyers and announcements in English and Spanish
  - » Online registration system

- » Sign-in sheets, an agenda, informational handouts, PowerPoint presentation
- » Materials to document feedback from participants
- Online meeting registration system for the public meetings
- Attendance by two PlaceWorks staff members at three in-person and one virtual public meetings (four total)
- Attendance by two PlaceWorks staff members at four in-person and four virtual small community meetings (eight total)
- Attendance by two PlaceWorks staff members at two in-person and three virtual small-group stakeholder meetings (five total)
- Attendance by one PlaceWorks staff member at two in-person and four virtual one-on-one interviews (six total)
- Community Engagement Summary Memo (administrative draft and final)
  - » The final Community Engagement Summary Memo will be included as an appendix in the Housing Action and Implementation Plan
- OPTIONAL:
  - » Additional meetings and interviews on a per-meeting or interview basis
    - The cost proposal assumes that PlaceWorks will use the meeting and interview materials from Task 2 with minor modifications to be specific to the additional meeting. If the County would like to account for the possibility that major changes may be needed, the cost for this optional item can be adjusted.
- » Online meeting registration system for the small community meetings
- CONTINGENCY: Translation services

### Task 3. Analysis of Current Conditions

PlaceWorks will conduct a thorough analysis of current conditions in the county.

#### 3.1 Current Conditions and Summary Report

PlaceWorks will collect information on current conditions from a variety of sources and provide an Analysis of Current Conditions Summary Report. Sources will include the U.S. Census Bureau, HUD, and local sources like County and City (Clearlake and Lakeport) Planning Departments and Building Divisions. PlaceWorks will analyze at least the following topics and add to this list to ensure that a thorough analysis of current conditions is provided to the County.

- Current and forecasted demographic metrics – e.g., total population, age, and race/ethnicity
- Household characteristics – e.g., family size, household income, homelessness, vacancy, overcrowding, and tenure
- Housing supply – e.g., housing types, housing age, and housing conditions
- Housing costs – e.g., home sale prices, the cost of rent, and the housing cost burden
- Subsidized housing – e.g., types and use of housing vouchers, the location of subsidized housing units, the number of subsidized housing units, the level of affordability of subsidized units, availability of ADA (American with Disabilities Act of 1990)-compliant housing, populations served, as well as any changes to non-low-income use through mortgage pre-payment, subsidy contract expirations, or similar factors

- Housing for special populations – e.g., age-restricted housing, agricultural worker housing, housing for persons with mental and physical disabilities, homeless and supportive housing
- Local regulations and policies\* – e.g., zoning districts, local tax policies, and code enforcement, County Local Area Plans
- Inventory of local housing support services and resources – nonprofit and community organizations working on housing issues, municipal housing-related programs, other local resources
- Employment Opportunities – identify larger employers in the area and trends in employment, including commute patterns and remote work
- Infrastructure – analysis pertaining to housing where strengths are identified as well as constraints for future housing developments
- Mitigation – identify policies and/or action taken to increase resilience to disasters and reduce long-term risk as well as any steps to have a resilient infrastructure
- Housing Barriers – identify current barriers to increasing housing stock or rehabilitation activities
- Equity and Affirmatively Furthering Fair Housing – determine what policies are currently in place to ensure equity and policies to affirmatively further fair housing
- Housing Legislation – identify recent State housing legislation that can impact housing production
- Housing during a disaster – identify where citizens are housed during a natural disaster.

### **Task 3 Deliverables:**

- » Analysis of Current Conditions Summary Report (administrative draft and final)
  - The final Analysis of Current Conditions Summary Report will be included as an appendix in the Housing Action and Implementation Plan.
- » OPTIONAL: Analysis of Clearlake and Lakeport’s local regulations and policies\*

*\*Analysis of current conditions regarding the local regulations and policies of Lake County are included in the cost proposal. An analysis of Clearlake and Lakeport’s local regulations and policies is included in the cost proposal as an optional task. Analysis of all other topics described in Task 3.1 will include Lake County, Clearlake, and Lakeport.*

## **Task 4. Housing Action and Implementation Plan**

PlaceWorks will prepare a comprehensive planning document developed with input from relevant community partners. The Housing Action and Implementation Plan will address the availability and condition of long-term housing opportunities across the housing spectrum in Lake County. The plan will provide a detailed analysis and actionable recommendations that will provide an opportunity to make a meaningful difference for rural and historically impoverished communities in the county.

We understand that Lake County faces housing challenges that are common in California and the United States; including high interest rates and development fees, inflation, and limited skilled labor availability. We also understand that a series of compounding wildfire events since 2015 have decimated more than 5 percent of the county’s housing supply, enhancing the effects of long-term economic and other challenges.

We appreciate the importance of providing Lake County with a solid plan, with strategies to mitigate these challenges to the extent possible, and to preserve current housing stock and develop new housing. Tasks 4.1 through 4.6 provide the steps that PlaceWorks will take to complete this work.

## 4.1 Gaps Analysis

The Gaps Analysis will provide an analysis of how housing conditions and County policies are meeting current and forecasted housing demands. The Gaps Analysis will consider qualitative and quantitative information collected from Tasks 2 and 3, including, but not limited to:

- Analysis of how existing County regulations affect local housing supply and identification of constraints resulting from local policies, including a financial feasibility analysis to assess the impact of development regulations on new development.
- Analysis of possible incentives to build more affordable housing. Identifying both State and federal programs available with an emphasis on new legislation passed in California and HCD programs.
- Analysis of how trends in housing costs compare to trends in household income for renters and owners.
- Projection of housing demand 5, 10, and 15 years into the future, based on population projections and demographic trends compared to projected estimated housing stock over the same period.
- Latent housing demand resulting from overcrowded housing.
- The need for “precovery” – preparation for future natural disasters with a focus on housing.

## 4.2 Goals and Strategies

Based on Tasks 2, 3, and 4.1, PlaceWorks will develop goals and strategies to guide the County. PlaceWorks will prepare a comprehensive set of goals and strategies, including the identification of key partnerships for the County. At the request of the County, PlaceWorks will develop a tracking and feedback system. This system is an annual evaluation process to assess progress toward housing goals. It has been included as an optional task.

The goals and strategies will:

- Identify any resources available to attain these goals in the most efficient and cost-effective manner e.g., State and federal assistance and local area partnerships and local housing champions.
- Identify strategies to help fund additional affordable and market-rate housing.
- Identify strategies to overcome housing barriers (e.g., zoning code amendments, reduction of parking requirements, density bonuses, availability of housing vouchers).
- Identify additional alternative solutions to housing needs.

## 4.3 Action Steps and Resources

PlaceWorks will provide a series of action steps that support the goals set forth in Task 4.2. If appropriate, action steps may include identification of specific sites that will be prioritized for housing development, as identified in Task 5. These action steps will serve as a foundation for the County’s upcoming 7th cycle Housing Element update. They will help the County meet State law requirements and address the specific needs and desires identified by stakeholders.



PlaceWorks will include information on the resources needed to carry out action steps, such as legal instruments, lease and purchase agreement examples/templates, etc.

Each Action Step will include:

- A description of which goal(s) the action supports and strategies to attain these goals
- An assignment of roles and responsibilities for implementation
- Estimation of costs and identification of resources needed
- A projected timeline for implementation
- Available funding and resources

#### 4.4 Administrative Draft Plan

PlaceWorks will provide County staff with an administrative draft of the Housing Action and Implementation Plan and revise the plan in response to comments from County staff. PlaceWorks will hold a screencheck meeting with County staff to ensure that the requested edits were completed satisfactorily.

This scope and budget assumes one round of review of the fully compiled plan. It is also assumed that all comments and edits (in tracked changes) from County staff will be compiled in one version of the plan. If the County would like to include additional rounds of review, we are happy to add that to the scope and budget.

#### 4.5 Board of Supervisors Plan and Presentation

Once the revisions from Task 4.4 are complete, PlaceWorks will provide County staff with a draft of the plan that is suitable for release to the public and the Board of Supervisors. PlaceWorks will prepare and deliver a presentation to the Board of Supervisors either in-person or virtually, depending on the County's preference. The budget accounts for an in-person presentation. PlaceWorks will receive comments on the draft from the public and the Board of Supervisors. PlaceWorks will coordinate with County staff following the presentation to determine any edits that PlaceWorks will make to the plan.

This scope of work does not include a presentation of the draft plan to elected officials in Clearlake or Lakeport. However, if the County would like to add that, the costs of the optional additional meetings from Task 2 would apply.

#### 4.6 Final Draft Plan

Once the revisions from Task 4.5 are complete, PlaceWorks will provide County staff with the final draft of the plan.

##### ***Task 4 Deliverables and Meetings:***

- » Housing Action and Implementation Plan:
  - Administrative draft and screencheck meeting;
  - Board of Supervisors draft and presentation at Board of Supervisors public meeting (includes attendance from either the project manager or assistant project manager)
  - Final draft plan: two hard copies plus an accessible PDF
- » OPTIONAL:
  - Annual Evaluation Process (see Task 4.2)
  - Additional Plan Components for Clearlake and Lakeport.\*

*\*As assumed in the cost proposal, all of the components of the plan will be applicable to Lake County, Clearlake, and Lakeport, except certain components that are only specific to Lake County. These components include (1) analyses related to existing regulations and the identification of constraints resulting from local policies; (2) goals, strategies, and action steps that are directly related to local regulations, policies, and procedures; and (3) inclusion of information in the plan from an analysis of sites within city boundaries (optional task under Task 5). This set of additional plan components for Clearlake and Lakeport is included in the cost proposal as an optional task. All other components described in Task 4 will include Lake County, Clearlake, and Lakeport.*

## Task 5. Identification of Sites for Housing Development

PlaceWorks will identify sites for potential housing development. As shown in **Figure 2**, Task 5 will be a parallel effort with Task 4.

### 5.1 Sites Inventory and Analysis

In response to the findings from earlier tasks, PlaceWorks will identify sites for potential housing development. PlaceWorks will propose a methodology for site selection to County staff and collaborate on a final approach to the identification of sites. PlaceWorks will provide a sites inventory that will be a valuable resource for the County in the development of its 7th cycle Housing Element. We will rely on our extensive experience working on behalf of cities and counties to provide Housing Element sites inventories that meet the requirements of State law and the stringent standards of HCD's reviewers. We understand how to analyze the realistic capacities of residential and mixed-use sites to accommodate jurisdictions' Regional Housing Needs Allocation (RHNA). We also understand how to analyze the realistic development potential of nonvacant/underutilized sites based on jurisdictions' past experience converting existing uses to higher-density residential development, market trends and conditions, and regulatory or other incentives or standards that encourage additional housing development on any nonvacant sites.

PlaceWorks will also consider factors such as:

- Existing zoning and building potential
- Compatibility with adjacent and nearby land use
- Environmental factors, such as fire hazards, flooding, and wetlands
- Presence of potential health hazards, such as asbestos, lead-based paint, or harmful substances left from prior uses of the site
- Proximity and accessibility to utilities and infrastructure (roads, sewers, water)
- Proximity and accessibility to opportunities and services, such as schools, public transit, businesses, and parks
- Property ownership
- Disparate impacts and effects

PlaceWorks will prepare a draft sites inventory and meet with County staff to discuss it. PlaceWorks will revise the inventory based on feedback from County staff. Once the inventory is finalized, PlaceWorks will prepare a Site Analysis Summary Report with maps and additional information about how the sites can accommodate the needs of households at all income levels. At the request of the County, PlaceWorks will

prepare and host an interactive online web map of the sites inventory. This is included in the cost proposal as an optional task.

**Task 5 Deliverables:**

- » Site Inventory in Microsoft Excel and GIS layers
- » Site Analysis Summary Report including maps (administrative draft and final). Upon request from the County, the Site Analysis Summary Report will be included as an appendix or chapter in the Housing Action and Implementation Plan.
- » OPTIONAL:
  - o Analysis of sites within the boundaries of Clearlake and Lakeport\*
  - o Interactive online web map of the sites inventory

*\*As assumed in the cost proposal, sites within Lake County (including within the spheres of influence (SOIs) of Clearlake and Lakeport) are included. If the County would like to add an analysis of sites within the boundaries of Clearlake and Lakeport, the cost is provided as an optional task.*

## Schedule

PlaceWorks' proposed schedule for completion of the Lake County Housing Action and Implementation Plan is shown in **Figure 2**. As shown in the schedule, we anticipate that the project can be completed by October 2024. We believe this schedule is in keeping with your needs, but we are happy to revise this schedule if necessary.

PlaceWorks has a strong track record in meeting project schedules and coordinating closely with its clients. Over years of managing projects similar to the Lake County Housing Action and Implementation Plan, we have developed a variety of tools to keep projects on schedule and ensure that staff are well informed at all times:

- We maintain an up-to-date schedule throughout the project, to ensure that all team members are aware of upcoming meetings and product due dates.
- We stay in close, regular contact with staff and document important decisions about the project in writing, which ensures that decisions are understood by all team members.
- We schedule project due dates for staff with adequate time for editing and formatting into finished reports.

FIGURE 2 SCHEDULE

Task	March		April		May		June		July		August		September		October	
	1st half	2nd half	1st half	2nd half	1st half	2nd half	1st half	2nd half	1st half	2nd half	1st half	2nd half	1st half	2nd half	1st half	2nd half
<b>TASK 1 PROJECT INITIATION AND MANAGEMENT</b>																
1.1 Project Kick Off																
1.2 Data Collection and GIS Creation																
1.3 Ongoing Project Management and Coordination																
<b>TASK 2 COMMUNITY PARTNERSHIP AND ENGAGEMENT</b>																
2.1 Community Engagement Plan																
2.2 Public Meetings (4)																
2.3 Smaller Community Meetings, Stakeholder Meetings and Interviews (20)																
2.4 Community Engagement Summary Memo																
<b>TASK 3 ANALYSIS OF CURRENT CONDITIONS</b>																
3.1 Analysis of Current Conditions																
<b>TASK 4 HOUSING ACTION AND IMPLEMENTATION PLAN</b>																
4.1 Gaps Analysis																
4.2 Goals and Strategies																
4.3 Action Steps and Resources																
4.4 Admin. Draft Plan (& 1 round of revisions)																
4.5 Board of Supervisor's Plan and Presentation																
4.6 Final Draft Plan																
<b>TASK 5 IDENTIFICATION OF SITES FOR HOUSING DEVELOPMENT</b>																
5.1 Identification of Sites for Housing Development																
<i>If optional tasks are selected, will be completed concurrently with the tasks that they are identified with in the scope of work. This schedule assumes that we are either under contract or have received a notice to proceed by the end of February.</i>																
MarketWorks Preparation of Project Task																
Market/Interviews (Public, Community, Stakeholder)																
Staff Review of Work Products																
Team Meetings - Conference Calls																
Board of Supervisors Meeting																
Board of Supervisors and Public Review of Work Products																

## Products

A summary of PlaceWorks' product deliverables is itemized below. All written products will be submitted in Microsoft Word to allow County staff to review and suggest edits in "Track Changes." PDF copies may also be submitted as appropriate. Final editions of the Housing Action and Implementation Plan will be provided as two hard copies plus an accessible PDF. All documents will be designed to accommodate future updates and amendments.

### ***Task 1 Deliverables and Meetings:***

- » Kick-off meeting (virtual) with agenda, data needs list, and summary notes
- » GIS database
- » Twelve biweekly/monthly check-in meetings (virtual) with agendas and summary notes

### ***Task 2 Deliverables and Meetings:***

- » Stakeholder contact list
- » Community Engagement Plan (administrative draft and final)
- » Meeting materials, tailored to each meeting type:
  - Flyers and announcements in English and Spanish
  - Online registration system
  - Sign-in sheets, an agenda, informational handouts, PowerPoint presentation
  - Materials to document feedback from participants
- » Online meeting registration system for the public meetings
- » Attendance by two PlaceWorks staff members at three in-person and one virtual public meetings (four total)
- » Attendance by two PlaceWorks staff members at four in-person and four virtual small community meetings (eight total)
- » Attendance by two PlaceWorks staff members at three in-person and three virtual small-group stakeholder meetings (six total)
- » Attendance by one PlaceWorks staff member at two in-person and four virtual one-on-one interviews (six total)
- » Community Engagement Summary Memo (administrative draft and final)
  - The final Community Engagement Summary Memo will be included as an appendix in the Housing Action and Implementation Plan
- » OPTIONAL:
  - Additional meetings and interviews on a per-meeting or interview basis
    - The cost proposal assumes that PlaceWorks will use the meeting and interview materials from Task 2 with minor modifications to be specific to the additional meeting. If the County would like to account for the possibility that major changes may be needed, the cost for this optional item can be adjusted.
  - Online meeting registration system for the small community meetings on a per-meeting basis.

- » CONTINGENCY: Translation services

***Task 3 Deliverables:***

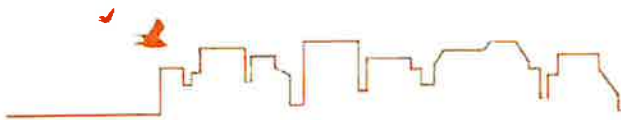
- » Analysis of Current Conditions Summary Report (administrative draft and final)
  - The final Analysis of Current Conditions Summary Report will be included as an appendix in the Housing Action and Implementation Plan.
- » OPTIONAL: Analysis of Clearlake and Lakeport's local regulations and policies

***Task 4 Deliverables and Meetings:***

- » Housing Action and Implementation Plan:
  - Administrative draft and screencheck meeting
  - Board of Supervisors draft and presentation at Board of Supervisors public meeting (includes attendance from either the project manager or assistant project manager)
  - Final draft plan: two hard copies plus an accessible PDF
- » OPTIONAL:
  - Annual Evaluation Process
  - Additional Plan Components for Clearlake and Lakeport

***Task 5 Deliverables:***

- » Site Inventory in Microsoft Excel and GIS layers
- » Site Analysis Summary Report, including maps (administrative draft and final). Upon request from the County, the Site Analysis Summary Report will be included as an appendix or chapter in the Housing Action and Implementation Plan.
- » OPTIONAL:
  - Analysis of sites within the boundaries of Clearlake and Lakeport
  - Interactive online web map of the sites inventory



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## 3. SAMPLES OF WORK PLANS

Links to relevant PlaceWorks work samples are provided below.

**Vacaville Housing Analysis and Strategy (as a subconsultant to EPS)**

<https://www.cityofvacaville.gov/home/showpublisheddocument/20574/637896903441770000>

**2023-2031 Housing Element for the City of Emeryville – 2023 Recipient of APA California Northern Section Award of Excellence in the Best Practices Category**

[https://www.ci.emeryville.ca.us/DocumentCenter/View/14791/Emeryville-Housing-Element-Certification-Draft-LANDSCAPE\\_Clean\\_1\\_20\\_23](https://www.ci.emeryville.ca.us/DocumentCenter/View/14791/Emeryville-Housing-Element-Certification-Draft-LANDSCAPE_Clean_1_20_23)

**Housing for Middle-Income Households, an Economic Analysis of Missing-Middle Housing for City of Elk Grove**

[https://www.elkgrovecity.org/sites/default/files/city-files/Departments/SPI/Housing\\_2021/MissingMiddle/Housing%20for%20Middle-Income%20Households%20-%20DRAFT%2020200212-Version2.pdf](https://www.elkgrovecity.org/sites/default/files/city-files/Departments/SPI/Housing_2021/MissingMiddle/Housing%20for%20Middle-Income%20Households%20-%20DRAFT%2020200212-Version2.pdf)

**2023-2031 Multi-Jurisdictional Housing Element Update for the Solano County Collaborative, Solano County, CA**

<https://solhousingelements.com/housing-elements/>



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## 4. REFERENCES

Attached as an appendix to this proposal are two letters of recommendation from the City of Emeryville and City of Vacaville. PlaceWorks has extensive experience providing housing services to these local agencies, including preparing the Housing Analysis and Strategy as a subconsultant to EPS for the City of Vacaville and updating both Vacaville and Emeryville's Housing Elements for the 6th cycle. PlaceWorks also managed the City of Emeryville's Below Market Rate (BMR) Housing Program, provided the City with white papers on topics including *Supportive Housing with Master Leasing* and *Unified Affordable Housing Application Portals and Waitlists*, and provided the City with training modules for the property managers at affordable rental properties.

### Relevant Projects

In addition to our work plan samples and references, PlaceWorks would like to highlight the following projects relevant to the Lake County Housing Action and Implementation Plan.

#### 2023-2031 MULTI-JURISDICTIONAL HOUSING ELEMENT UPDATE | SOLANO COUNTY COLLABORATIVE, SOLANO COUNTY, CA

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The Solano County REAP Housing Element Collaborative is made up of the Cities of Benicia, Dixon, Fairfield, Rio Vista, Suisun City, Vacaville, Vallejo, and the County of Solano. With funding from the Regional Early Action Planning Grant Program (REAP), PlaceWorks conducted regional Housing Element outreach and prepared housing needs assessments and fair housing assessments at the regional scale. PlaceWorks also prepared local housing element sections for each city and the county and CEQA documentation to ensure that each jurisdiction could obtain a certified Housing Element. The multi-jurisdictional approach provided an opportunity to assess and address countywide housing issues and identify meaningful goals to address the impacts of systemic issues such as residential segregation, housing cost burden, and unequal educational or employment opportunities.


#### 2019-2027 MENDOCINO COUNTY HOUSING ELEMENT UPDATE | MENDOCINO COUNTY, CA

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The PlaceWorks team prepared the County of Mendocino's 6th Cycle Housing Element update, which included an evaluation of existing housing programs; a housing needs analysis; identification of housing resources and opportunities; housing constraints analysis update; and housing goals, policies, programs, and quantified objectives updates.

#### 2021-2029 YUBA COUNTY HOUSING ELEMENT UPDATE | YUBA COUNTY, CA

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PlaceWorks worked with Yuba County to prepare an update to the County’s Housing Element, Safety Element, and Development Code. Spanning from the floor of the Sacramento Valley to the peaks of the western Sierra Nevada, Yuba County is faced with a range of public safety issues, including extreme temperatures, flooding, drought, and wildfire. The Safety Element update helped to address these issues by conducting an extensive vulnerability assessment of the effects of climate change on populations and assets in Yuba County, analyzing gaps in the current Safety Element in response to community needs and changes in State law, and developing new policies and mapping to address the identified challenges. The 6th cycle Housing Element update analyzed the areas suitable for housing and identified sufficient sites to address the RHNA assigned to the unincorporated county. It also evaluated programs to address housing needed through 2029. Updates made to the Development Code addressed State housing law and implemented some of the County’s Housing Element programs.

### 2019–2027 ARCATA HOUSING ELEMENT UPDATE | ARCATA, CA

PlaceWorks assisted the City of Arcata with its 6th Cycle Housing Element update. This was a collaborative approach with City staff to engage with the community and complete a technical update to the Housing Element. PlaceWorks revised the 2014–2019 Housing Element to address all new State law requirements, reflect current demographic and housing market conditions, and review and assess housing-related goals and objectives while addressing issues and establishing objectives that have been suggested by the community.

### HOUSING TECHNICAL ASSISTANCE SERVICES | CALIFORNIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

On behalf of HCD, PlaceWorks has provided technical assistance to help launch and implement the SB 2 Planning Grants Program and the Local and Regional Accelerating Housing Production (LEAP/REAP) Program. PlaceWorks conducted outreach throughout the state and provided direct assistance to all 540+ Cities and Counties through 11 regional liaisons. This included identifying tools and projects to leverage the program’s \$125 million allocation to increase housing production, including targeted general plan updates, community plans and specific plans, by-right zoning, objective design standards, accessory dwelling unit (ADU) plans, streamlined environmental analyses, and process updates to improve and expedite local permitting. PlaceWorks assisted HCD to establish a new statewide “pro-housing designation,” create toolkits to help implement State housing legislation, and develop an online GIS portal of planning grant information and a statewide database showing various indicators related to equity and affirmatively furthering fair housing.

### DANA POINT ECONOMIC AND MARKET PROFILE | DANA POINT, CA

The profile’s economic analysis elucidated the economy in Dana Point and quantified the current and projected market demand for office and industrial development for 5-, 10-, and 20-year horizons. The retail market demand analysis projected demand for retail stores, personal services, dining, lodging, entertainment, and commercial recreation and identified strategies to capture leaked retail spending and attract more consumer spending from beyond the city. The profile also included a residential market demand

analysis describing the current residential market and how Dana Point participates in the regional market. Finally, the report analyzed several opportunity sites to determine the types of development that would be financially feasible.

## HOUSING FOR MIDDLE-INCOME HOUSEHOLDS | ELK GROVE, CA

During its Housing Element update, Elk Grove asked why the market was not producing missing-middle housing types and how well did the market provide housing for middle-income households. PlaceWorks' market analysis summarized trends that influenced demand, described the regional market of middle-income households, and analyzed the development feasibility of missing-middle housing products.

PlaceWorks analyzed the financial feasibility of 12 types of missing-middle housing with densities of 10.2 to 30 units per acre. The analysis found that small lot/small, detached products would be affordable to 50.2 percent of middle-income households. The other 11 product types would not be affordable to the majority of middle-income households.

The report recommended:

- » Establish standards for small-lot, middle-income housing.
- » Establish landscaped open space standards for middle-income housing.
- » Limit unit sizes for middle-income housing.
- » Reduce development fees for middle-income housing.
- » Expand first-time home buyers to include middle-income households.
- » Promote regional housing development for middle-income households.

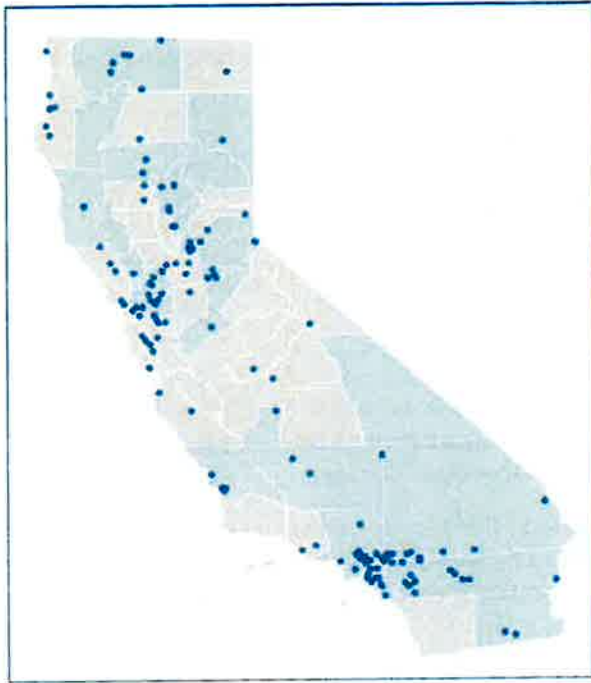
## List of Clients

Figure 3 shows public agencies for whom PlaceWorks has prepared HCD-certified Housing Elements.

FIGURE 3 HOUSING ELEMENT EXPERIENCE

## Housing Element Experience

◆ = Housing Element has been adopted in the 6<sup>th</sup> Cycle.



### Cities

- ◆ Alameda
- ◆ Albany
- ◆ Anderson
- ◆ Arcata
- ◆ Arroyo Grande
- ◆ Auburn
- ◆ Bakersfield
- ◆ Benicia
- ◆ Biggs
- ◆ Blythe
- ◆ Callmesa
- ◆ Capitola
- ◆ Chico
- ◆ Chino
- ◆ Clayton
- ◆ Cloverdale
- ◆ Clovis
- ◆ Coachella
- ◆ Colfax
- ◆ Compton
- ◆ Concord
- ◆ Corning
- ◆ Crescent City
- ◆ Cupertino
- ◆ Dana Point
- ◆ Davis
- ◆ Dixon
- ◆ Dorns
- ◆ Dublin
- ◆ Dunsuir
- ◆ Eastvale
- ◆ El Monte
- ◆ Elk Grove
- ◆ Emeryville
- ◆ Etna
- ◆ Fairfield
- ◆ Forcuna
- ◆ Fountain Valley
- ◆ Greenfield
- ◆ Gridley
- ◆ Grover Beach
- ◆ Hanford
- ◆ Highland
- ◆ Holtville
- ◆ Hughson
- ◆ Imperial
- ◆ Industry
- ◆ Ione
- ◆ Jackson
- ◆ La Habra
- ◆ La Quinta
- ◆ Laguna Woods
- ◆ Lake Elsinore
- ◆ Lincoln
- ◆ Livermore
- ◆ Lodi
- ◆ Los Altos
- ◆ Madera
- ◆ Marysville
- ◆ Menifee
- ◆ Menlo Park
- ◆ Milpitas
- ◆ Montague
- ◆ Moorpark
- ◆ Morro Bay
- ◆ Ontario
- ◆ Orinda
- ◆ Orland
- ◆ Oxnard
- ◆ Palm Springs
- ◆ Palmdale
- ◆ Pasadena
- ◆ Perris
- ◆ Pismo Beach
- ◆ Pittsburg
- ◆ Pleasanton
- ◆ Plymouth
- ◆ Pomona
- ◆ Rancho Cordova
- ◆ Rancho Cucamonga
- ◆ Rancho Mirage
- ◆ Ridgecrest
- ◆ Rio Dell
- ◆ Rio Vista
- ◆ Riverside
- ◆ Rocklin
- ◆ Roseville
- ◆ San Bernardino
- ◆ San Dimas
- ◆ San Marino
- ◆ San Ramon
- ◆ Santa Ana
- ◆ Santa Cruz
- ◆ Santa Monica
- ◆ Santa Rosa
- ◆ Seaside
- ◆ Soledad
- ◆ South Lake Tahoe
- ◆ Stanton
- ◆ Sulisun City
- ◆ Sutter Creek
- ◆ Tehama
- ◆ Temecula
- ◆ Tustin
- ◆ Twentynine Palms
- ◆ Upland
- ◆ Vacaville
- ◆ Wasco
- ◆ West Sacramento
- ◆ Westminister
- ◆ Whittier
- ◆ Wildomar
- ◆ Willits
- ◆ Willows
- ◆ Yorba Linda
- ◆ Yreka
- ◆ Yuba City
- ◆ Yucaipa

### Counties

- ◆ Amador
- ◆ Butte
- ◆ Calaveras
- ◆ Contra Costa
- ◆ El Dorado
- ◆ Imperial
- ◆ Inyo
- ◆ Kern
- ◆ Kings
- ◆ Lake
- ◆ Lassen
- ◆ Los Angeles
- ◆ Mendocino
- ◆ Napa
- ◆ Orange
- ◆ Placer
- ◆ Riverside
- ◆ San Bernardino
- ◆ San Luis Obispo
- ◆ Siskiyou
- ◆ Solano
- ◆ Stanislaus
- ◆ Tehama
- ◆ Trinity
- ◆ Yuba

### Towns

- ◆ Town of Corte Madera
- ◆ Town of Fairfax
- ◆ Town of Loomis
- ◆ Town of Los Gatos
- ◆ Town of Mammoth Lakes
- ◆ Town of Paradise
- ◆ Town of Truckee
- ◆ Town of Windsor
- ◆ Town of Yountville
- ◆ Town of Yucca Valley

### SB 2 Housing Element Technical Assistance

- ◆ City of Alturas
- ◆ City of Blue Lake
- ◆ City of Montebello
- ◆ City of Needles
- ◆ City of Soledad
- ◆ City of Susanville
- ◆ City of Trinidad
- ◆ County of Plumas
- ◆ Town of Fort Jones



## 5. COST PROPOSAL

As shown in **Table 2**, the estimated cost to complete the scope of work described in this proposal is \$203,940 (not including optional tasks or contingency).

If we account for all optional tasks and contingency, the grand total is \$253,520.

We are flexible regarding project costs and hope that you will not eliminate us from consideration based on cost alone.

The billing rates for each team member are included in **Table 2**.

PlaceWorks bills its work on a time-and-materials basis with monthly invoices.

### Assumptions

This scope of work and cost estimate assumes that:

- Our cost estimate includes the meetings shown in this proposal's Work Plan (see Section 2). Additional meetings would be billed on a time-and-materials basis. Amy Sinsheimer, Nicole West, or Steve Gunnells will attend all project meetings, public meetings, and stakeholder meetings.
- All products will be submitted to the County in electronic (PDF) format, except for printed copies that are specifically identified in Task 4.6. This is an allowance only, based on the numbers of products and copies shown in Section 2. If this allowance is exceeded, additional printing costs will be billed at PlaceWorks' actual cost.
- County staff will be responsible for meeting logistics, including schedule coordination, document production, printing notices, mailing costs, room reservations, room set-up and take-down, and refreshments.
- As accounted for in the cost proposal, to the extent feasible, PlaceWorks will schedule multiple in-person activities under Task 2 in the same trip to limit time spent traveling and associated expenses.

### Optional Tasks

Optional tasks are described in various places throughout the scope of work and they are included on the list of deliverables at the end of Section 2. For the purposes of estimating the costs of the optional tasks, they are listed on the cost proposal under Task 6, as follows:

- 6.1 Additional In-Person Public, Community, or Stakeholder Meetings (cost per meeting) (SOW Task 2)
- 6.2 Additional Virtual Public, Community, or Stakeholder Meetings (cost per meeting) (SOW Task 2)
- 6.3 Additional Virtual One-on-One Interviews (cost per interview) (SOW Task 2)

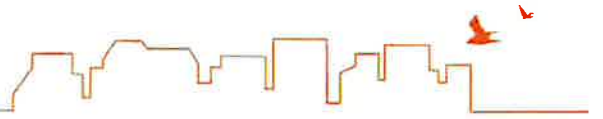
- 6.4 Online meeting registration system for small community meetings or additional public meetings (cost per meeting) (SOW Task 2)
- 6.5 Analysis of Clearlake and Lakeport's local regulations and policies (SOW Task 3)
- 6.6 Annual Evaluation Process (SOW Task 4)
- 6.7 Additional Plan Components for Clearlake and Lakeport (SOW Task 4)
- 6.8 Analysis of sites within the boundaries of Clearlake and Lakeport (SOW Task 5)
- 6.9 Interactive online web map of the sites inventory (SOW Task 5)

TABLE 2 COST ESTIMATE

	Jennifer Gastelum	Amy Spohnner	Nicole West	Steve Gunnells	Cory Witter	Angelia Garcia	David Christie	Allison Giffin	Lauren Willey	TECH. EDITOR	WP/ CLERICAL	PlaceWorks Hours	PlaceWorks Total	Total Task Budget
<b>TASK 1: Project Planning and Management</b>														
1.1 Initial Meeting	1	1	2	1	1	2	2	2				7	\$1,465	\$1,465
1.2 Data Collection and GIS Creation	2	24	15	2	4	4	4	6	40			54	\$11,500	\$11,500
1.3 Ongoing Project Management and Coordination	3	27	22	3	6	4	4	4	7			115	\$22,915	\$22,915
<b>TASK 2: Community Outreach and Engagement</b>														
2.1 Community Outreach Plan	1	5	8	1	1	2	2	2				31	\$5,700	\$5,700
2.2 Public Meetings (6)	0	3	61	1	1	6	6	4	68	74	3	181	\$11,000	\$11,000
2.3 Smaller Community Meetings, Stakeholder Meetings and Interviews (20)		10	88	16	16	34	11	4	82	3	0	264	\$49,890	\$49,890
2.4 Community Engagement Summary Memo	1	20	161	18	20	27	21	6	183	31	5	315	\$5,485	\$5,485
<b>TASK 3: Analysis of Current Conditions</b>														
3.1 Analytical Current Conditions	1	5	6	4	4	4	4	4				27	\$15,090	\$15,090
<b>TASK 4: Community Vision and Implementation Plan</b>														
4.1 Vision Plan	1	8	4	4	4	4	4	4	0	2	5	27	\$15,090	\$15,090
4.2 Local and State Plan	2	7	18	18	18	12	12	12				54	\$11,940	\$11,940
4.3 Action Steps and Expenses	2	7	10	10	10	6	6	6				31	\$5,590	\$5,590
4.4 Admin. Data Input/ Review of Reviews	2	4	4	4	4	4	4	4				16	\$11,590	\$11,590
4.5 Regional Stakeholder Outreach Presentation	1	2	15	1	1	1	1	1				37	\$2,055	\$2,055
4.6 Final Data Plan	1	3	3	3	3	3	3	3				14	\$2,475	\$2,475
<b>TASK 5: Identification of Data for Website Development</b>														
5.1 Identification of Data for Website Development	2	10	10	2	2	2	2	2				118	\$21,800	\$21,800
<b>TASK 6: Website Design</b>														
6.1 Additional Information/Community Stakeholder Meetings (not per meeting) (SOW Task 2)	3	14	14	14	14	14	14	14				34	\$6,170	\$6,170
6.2 Additional Information/Community Stakeholder Meetings (not per meeting) (SOW Task 2)	2	3	3	3	3	3	3	3				9	\$1,725	\$1,725
6.3 Additional Information/Community Stakeholder Meetings (not per meeting) (SOW Task 2)	2	1	1	1	1	1	1	1				3	\$535	\$535
6.4 Professional Review of Website Design and Content (not per meeting) (SOW Task 3)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
6.5 Analysis of Content and Subjects, Web Regulations and Policies (SOW Task 3)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
6.6 Analytical Website Process (SOW Task 4)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
6.7 Additional Content Components for Creative and Layout (SOW Task 4)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
6.8 Analysis of User Interface and Usability (SOW Task 5)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
6.9 Interactive online web page of the website (SOW Task 5)	4	4	4	4	4	4	4	4				16	\$2,080	\$2,080
<b>TASK 6: Subtotal</b>	2	31	44	8	8	8	8	8	20	5	9	12	\$2,160	\$2,160
<b>Labor Hours Total</b>	17	115	284	87	89	64	248	106	183	44	37	49	1323	
<b>Labor Dollars Total</b>	\$3,180	\$27,500	\$63,600	\$20,500	\$16,910	\$11,120	\$39,680	\$19,080	\$18,365	\$5,160	\$5,500	\$6,615	\$286,120	
<b>CONINGENCY</b>														
Contingency														\$21,000
PlaceWorks Reimbursable Expenses														\$4,400
Project Expenses associated with Task 6 (not a per meeting hour)														\$4,400
<b>EXPENSES TOTAL</b>														\$50,800
<b>Grand Total Labor and Expenses without Optional Tasks or Contingency</b>														\$333,920
<b>Grand Total Labor and Expenses with Optional Tasks and without Contingency</b>														\$354,720
<b>Grand Total Labor and Expenses with Contingency and without Optional Tasks</b>														\$354,720
<b>Grand Total Labor and Expenses with Optional Tasks and Contingency</b>														\$375,520



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# RESUMES







# JENNIFER GASTELUM

## Principal

Jennifer has over 20 years of experience specializing in various housing programs and public outreach for municipalities across California, Nevada, and Washington. As a recognized leader in the field, she has managed updates to over 100 housing elements since 2008. Her experience also includes preparing HUD consolidated plans, action plans, analyses of impediments to fair housing choice, housing condition surveys, and housing market studies. Jennifer has significant experience overseeing grant management of State and federal programs, such as the Community Development Block Grant (CDBG) program, CalHOME, and HOME. She is also experienced in federal labor standard compliance review and monitoring.

Jennifer is committed to continuing education and training, and she has considerable experience leading project management and business development training. Other project experience includes specific plans, general plans, environmental impact reports, and initial studies/negative declarations.

## HIGHLIGHTS OF EXPERIENCE

- SB 2 and LEAP/REAP Technical Assistance | Statewide CA
- Solano County Multi-Jurisdictional Housing Element | Solano County CA
- Loomis General Plan Housing and Land Use Element Update | Loomis CA
- Orinda Housing Element and Safety Element | Orinda CA
- Auburn Housing Element and Safety Element | Auburn CA
- El Dorado County Housing Element 2021-2029 | El Dorado County CA
- Placer County Housing Element | Placer CA
- Elk Grove Housing Element Update | Elk Grove CA
- Yountville Cycle Housing Element Update | Yountville CA
- Lincoln Housing Element Update | Lincoln CA
- Anderson Housing Element Update | Anderson CA
- Arcata Housing Element Update | Arcata CA
- Arroyo Grande Housing Element Update | Arroyo Grande CA
- Auburn Housing and Safety Element Update | Auburn CA
- Grover Beach Housing Element Update | Grover Beach CA
- Morro Bay Housing Element Update | Morro Bay CA
- Alameda Housing Element | Alameda CA
- Willits Housing Element | Willits CA
- Pismo Beach Low-Cost Visitor-Serving Accommodation Study | Pismo Beach CA
- Pismo Beach 2020-2028 Housing Element | Pismo Beach CA
- Rohnert Park On-Call Housing Services | Rohnert Park CA
- San Luis Obispo County 2020-2028 General Plan Housing Element Update | San Luis Obispo County CA



## EDUCATION

- BS, City and Regional Planning, Cal Poly San Luis Obispo
- AA, American River College

## AFFILIATIONS

- American Planning Association

Team member since 2018



## JENNIFER GASTELUM

Principal

jgastelum@placeworks.com

- Calaveras County IS/ND Addendum | Calaveras County CA
- Elk Grove Housing Element Update | Elk Grove CA
- Emeryville Staff Support Services | Emeryville CA
- Fortuna Housing Element Assistance | Fortuna CA
- Riverside County Housing Assistance | Riverside County CA
- Needles Mid-Cycle Housing Element | Needles CA
- Oxnard Housing Element Update | Oxnard CA
- Placer County Housing Element Update | Placer County CA
- Trinity County Housing Element, Trinity County CA

## PREVIOUS EXPERIENCE

### Housing Elements

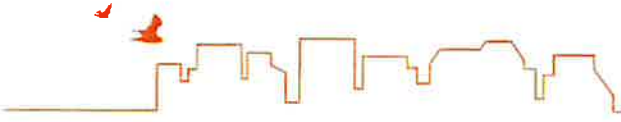
- 2015–2023 Housing Elements, Stanislaus County; Kern County; communities of Ridgecrest, Wasco, Lodi CA
- 2014–2022 Housing Elements, Butte County; Solano County; communities of Alameda, Emeryville, Pleasanton, Biggs, Paradise, Clayton, Orinda, Fairfax, Los Altos, Dixon, Fairfield, Suisun City, Cloverdale, Yountville, Santa Rosa CA
- 2014–2019 Housing Elements, Amador County; Tehama County; communities of Lone, Jackson, Plymouth, Sutter Creek, Truckee, Grover Beach, Morro Bay, Willows, Montague CA
- 2013–2021 Housing Elements, Imperial County; Riverside County; communities of South Lake Tahoe, Wildomar, Eastvale, Temecula, Auburn, Lincoln, Roseville, Calimesa, Coachella, Elk Grove, Rancho Cordova, West Sacramento, Ontario, Twentynine Palms, Blythe, Oxnard, Marysville, Yuba County, and Davis CA
- 2008–2013 Housing Elements, Imperial County; Kern County; cities of Elk Grove, Imperial CA
- 2009–2014 Housing Elements, Solano County, Siskiyou County, Inyo County; communities of Lone, Anderson, Dixon, Chico, Fairfield, Soledad, Morro Bay, Hughson, Yountville, Madera, Monterey, Mount Shasta, Arcata, Orland, Yreka, Willows, Red Bluff, Vallejo, Los Altos, Clayton, Crescent City, Weed, Willits, Sand City CA
- First General Plan Housing Element City and 2008–2013 Update, Rancho Cordova CA
- Housing Element Updates, Washoe County; cities of Reno, Sparks NV

### Federal Grant Program Management

- HOME Grant Administration, First-Time Homebuyers Program | Imperial County CA
- Community Development Block Grant Assistance | Rancho Cordova CA
- Community Development Block Grant Assistance | Citrus Heights CA
- CD3G, NSP, HOME, CalHOME Assistance | Monterey County CA
- City Labor Standards Compliance, NSP | Rancho Cordova CA

### Affordable Housing

- Plumas Corporation Countywide Affordable Housing Strategy | Plumas County CA
- Regional Fair Share Housing Allocation Plan | Pierce County WA
- Affordable Housing Study | El Dorado County CA
- Affordable Housing Incentives and Infill Site Development Report | Placer County CA



# AMY SINSHEIMER AICP

## Senior Associate

Amy has over 20 years of experience managing and preparing long-range planning and policy documents, with a specialty in housing. She has significant experience in public outreach for complex projects involving multiple agencies, stakeholders, and team members. Amy prepared housing elements during the 3rd, 4th, 5th, and 6th cycles and has worked closely with staff at the California Department of Housing and Community Development to achieve certification for her clients. Amy has also prepared housing element program implementation documents. She also has comprehensive zoning code and General Plan Update experience.

### HIGHLIGHTS OF EXPERIENCE

#### Housing Elements

- » Amador County
- » City of Auburn
- » City of Benicia
- » City of Biggs
- » City of Compton
- » Contra Costa County
- » City of Crescent City
- » City of Dixon
- » Town of Fairfax
- » City of Grover Beach (5th and 6th)
- » City of Lone
- » City of Jackson
- » Kern County
- » Lassen County
- » City of Livermore
- » City of Lodi
- » City of Marysville
- » City of Morro Bay (5th and 6th)
- » City of Orland
- » City of Oxnard (5th and 6th)
- » Town of Paradise
- » City of Pismo Beach
- » City of Plymouth
- » City of Ridgecrest
- » City of Riverside
- » Riverside County
- » Solano County
- » City of South Lake Tahoe (5th and 6th)
- » Stanislaus County
- » City of Stockton
- » City of Sutter Creek
- » City of Temecula
- » Trinity County
- » City of Wasco
- » City of Yreka
- » City of Yuba City
- » Yuba County (5th and 6th)
- » Town of Mammoth Lakes
- » City of Soledad
- » San Luis Obispo County
- » City of Arroyo Grande
- » City of Needles
- » Yucca Valley

#### Housing Implementation

- » City of Holtville
- » City of Marysville
- » City of Monterey
- » City of Morro Bay
- » City of Oxnard
- » City of Riverside
- » City of Soledad including ADU Handbook
- » City of Rohnert Park ADU Handbook
- » City of Morro Bay
- » Mobile Home Analysis
- » San Luis Obispo County ADU Analysis

### EDUCATION

- MA, City and Regional Planning, Cal Poly San Luis Obispo
- BS, Conservation and Resource Studies, University of California, Berkeley

### CERTIFICATIONS

- American Institute of Certified Planners

### AFFILIATIONS

- American Planning Association
- California Native Plant Society

Team member since 2018



## **AMY SINSHEIMER**

**Senior Associate**

asinsheimer@placeworks.com

### **Zoning Ordinance Amedments**

- Title 17 Zoning Code Comprehensive Update and Accessory Dwelling Unit Ordinance | Tuolumne County CA
- Stockton Zoning and Land Use Map Updates | Stockton CA

### **Additional Projects**

- Soledad General Plan Update | Soledad CA
- Central Coast Regional Liaison for State of California Senate Bill 2 and LEAP/REAP Implementation | Statewide CA
- Kern County Consolidated Plan and Analysis of Impediments to Fair Housing | Kern County CA
- Stanislaus County Consolidated Plan and Analysis of Impediments to Fair Housing | Stanislaus County CA
- Monterey Short-Term Rental Analysis | Monterey CA
- South Lake Tahoe Vacation Home Rentals Socioeconomic Impact Study | South Lake Tahoe CA
- Morro Bay General Plan and Local Coastal Program | Morro Bay CA
- Lancaster Community Homelessness Plan | Lancaster CA
- Beverly Hills Affordable Housing Assistance and Program Guidelines | Beverly Hills CA
- San Luis Obispo Downtown Concept Plan | San Luis Obispo CA

### **AWARDS**

- 2011 Best Public Participation/Education Program Award, APA AZ, Flagstaff Zoning Ordinance Update
- 2011 Driehaus Award for Excellence in Writing and Implementation of Form-Based Codes, Form-Based Codes Institute, Livermore Development Code Update



## NICOLE WEST AICP

### Senior Associate



Nicole has over 15 years of experience in planning, with specialties in housing, community development, open space and trails, and community outreach with diverse populations, including Native American Tribes. Nicole is currently co-managing California State Parks' Tribal Lands Acknowledgement, and Interpretation and Exhibits project, guiding the development of outreach and communication with California tribes regarding land acknowledgements and interpretive projects throughout the state. She has also managed dozens of Housing Element Updates, ensuring that local jurisdictions meet the requirements of new State laws to achieve certification. Nicole is experienced with various technical analyses including disadvantaged unincorporated community analyses under SB 244, and Public Services Needs Assessments.

Nicole is skilled at synthesizing quantitative and qualitative data, presenting key findings and developing actionable recommendations. She strives to understand the diverse perspectives in the communities where she works. Nicole enjoys collaborating on creative solutions to local issues and supports their implementation by crafting effective policies and plans.

## HIGHLIGHTS OF EXPERIENCE

### Housing Element Updates

- City of Arcata
- County of Trinity
- County of Mendocino
- City of Grover Beach
- City of Marysville
- City of Yuba City
- City of Ontario
- City of Laguna Hills
- City of Anderson
- City of Corning
- City of Emeryville
- City of Vacaville
- City of Yountville
- City of Stockton
- City of Soledad
- City of Huron
- City of Sanger
- City of Selma
- City of Kingsburg
- City of Reedley

## EDUCATION

- Master of Landscape Architecture and Master of Regional Planning, University of Massachusetts, Amherst
- BS, Sustainable Living, Humboldt State University

## CERTIFICATIONS

- American Institute of Certified Planners

## AFFILIATIONS

- American Planning Association

Team member since 2019





**NICOLE WEST**  
Senior Associate  
nwest@placeworks.com

#### SB 244 Disadvantaged Unincorporated Communities Analyses

- County of Imperial
- City of Marysville
- County of Yuba
- City of Lincoln
- City of Auburn
- County of Butte
- County of Mendocino
- County of Lassen
- City of Corning
- County of El Dorado

#### Additional Projects

- Rohnert Park ADU Handbook Website | Rohnert Park CA
- Emeryville Affordable Housing Assistance for the Metropolitan Transportation Commission (MTC) | Emeryville CA
- SB 2 Planning Technical Assistance | Statewide CA
- Housing Programs Administration for the Cities of Emeryville and Rohnert Park
- Tracy Affordable Housing Initiative Facilitation | Tracy CA
- Monterey Vulnerable Communities Needs Assessment | Monterey CA

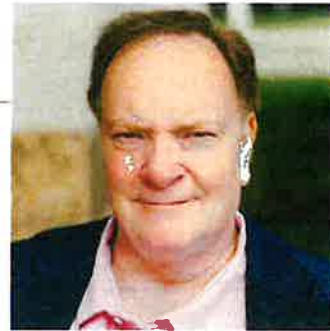
#### AWARDS

- 2023 Best Practices Award of Excellence, California APA, Northern Section | Emeryville 2023-2031 Housing Element



# STEVE GUNNELLS

## Chief Economist



Steve's career spans the spectrum of community planning and economic development. As PlaceWorks' in-house economist, he plays a role in a great many of the firm's active projects. He focuses on crafting plans, policies, and development projects that are grounded in regional and global economic realities. He helps his clients leverage market forces to achieve their goals. And most importantly, he uses his grasp of economics and real estate markets not only to overcome existing challenges but to help communities create visionary plans that capitalize on the possibilities, not just past trends.

Steve works with communities to bridge the gap between long-range planning policies and economic development—with community organizations and special districts to fund and implement priority projects—and with developers to guide project decision-making and obtain entitlements based on sound economic and market analysis. Steve has also served as the field director for a consulting team on a World Bank project in Yemen, an Economic Development Fellow with the International Economic Development Council, a county planning director in Virginia, and a planning and economic consultant in Michigan and Ohio.

## HIGHLIGHTS OF EXPERIENCE

### Economic and Market Analysis

- Logistics Industry Analysis | San Bernardino County CA
- TDR Bank Benefits Analysis | Santa Fe County NM
- Fiscal Impact Analysis, New Jersey Highlands Water Quality Protection and Regional Planning Act | Chester NJ
- Economic Analysis, Collier County Rural Fringe Mixed-Use District TDR Restudy | Naples FL
- Evaluation of Irvine Business Complex TDR Program | Irvine CA
- Market Analysis for the Downtown Redding Specific Plan | Redding CA
- Market Analysis, Southwest Fresno Specific Plan | Fresno CA
- Economic, Market, and Fiscal Analysis | San Clemente CA
- Market Analysis and Mixed-Use Development Feasibility Study | Chino CA
- Downtown Market Assessment and TOD Feasibility Study | Fontana CA
- Washoe County Economic Forecast and Analysis | Washoe County NV
- Fresno Marketplace | Fresno CA
- Dole Foods Atwater Plan and Market Analysis | Atwater CA

### Economic Development Planning

- Economic Development Element and Economic Development Strategic Action Plan | Corcoran CA
- Re-envisioning Chino: Implementing the 2025 General Plan | Chino CA

## EDUCATION

- MSc, Development Management, London School of Economics
- Master of Urban and Environmental Planning, University of Virginia
- BA, Urban Planning, Virginia Tech

## AFFILIATIONS

- American Planning Association
- Urban Land Institute

## AWARDS

- 2013 Best of the Best Award, ULI Orange County/Inland Empire | WRCOG Sustainability Framework
- 2012 SCAG Compass Blueprint Recognition Award, Achievement in Sustainability | Re-envisioning Chino: Implementing the 2025 General Plan
- Michael A. Hoffman Award (co-recipient), Council of Virginia Archaeologists | Acquisition and Preservation of the Morgan Jones Kiln Site, a National Register Site

Team member since 2007





## STEVE GUNNELLS

Chief Economist

sgunnells@placeworks.com

- Economic Development Feasibility Study for the California Community Foundation | El Monte CA
- North Hemet Revitalization Plan | Riverside County CA
- Economic Development Recommendations for the Southeast Industrial Area, SCAG Compass Blueprint Demonstration Project | Fullerton CA
- Coachella Commercial Entertainment District Planning Study | Coachella CA

### Comprehensive Planning

- San Bernardino Countywide Plan | San Bernardino County CA
- Bloomington Community Plan | Bloomington CA
- Westminster General Plan and EIR | Westminster CA
- Yucca Valley General Plan and EIR | Yucca Valley CA
- San Clemente General Plan and EIR | San Clemente CA
- Menifee General Plan and EIR | Menifee CA
- Industry General Plan Update and EIR | Industry CA
- Clovis General Plan Update and EIR | Clovis CA
- Economic Development Element, El Monte General Plan | El Monte CA
- Economic Development Element, The Ontario Plan | Ontario CA
- Strategic Plan Update: Community Profile and Environmental Scan | Torrance CA

### Urban and Regional Planning

- Sustainability Plan Framework, Western Riverside COG | Riverside County CA
- 2015–2050 Growth Forecast Update | Kern Council of Governments
- San Joaquin Valley Demographic Forecasts 2010 to 2050, Fresno COG | San Joaquin Valley CA
- Life on State Corridor Plan, Wasatch Front Regional Council | Multi-jurisdictional, Salt Lake County UT
- 5600 West BRT Phase I Station Area Plan | Salt Lake County UT
- Development Options around Transit Stations, SCAG Compass Demonstration Project | Azusa CA

### PRIOR EXPERIENCE

- Downtown Development Plan, Buena Vista Charter Township | Saginaw County MI
- Downtown Development Plan and Tax Increment Financing Plan, Lyon Charter Township | Oakland County MI
- Development Plan and Tax Increment Financing Plan, Van Buren Charter Township | Wayne County MI
- Tax-Increment-Financing Plan, Detroit Armory Redevelopment | Oak Park MI
- Economic Development Program | Richmond County VA
- Overall Economic Development Program | Westmoreland County VA
- Urban Development, Management, and Tourism Assessment, World Bank | Republic of Yemen

### SPEAKING ENGAGEMENTS

- “Rail and TOD: Getting on the Right Track” | 2015 ULI OC/IE District Council | Santa Ana CA
- “Economic Development for Planners” | 2011 Southern California Association of Governments’ Toolbox Tuesdays | Los Angeles CA
- “TOD and Downtown Development Opportunities” | 2010 Downtown Fontana Technical Advisory Roundtable | Fontana CA
- “Mixed-Use Development: Myth or Must” (Panelist) | 2009 Developer Conference, Multifamily Executive Conference | Las Vegas NV



## CORY WITTER

### Senior Associate

Cory's background in public health and community-based participatory research lends him a unique perspective of the planning world. The wide variety of his project experience so far has contributed to his passion for long-range planning, economic development, and community engagement. He views planning dilemmas as an intersection of the social and physical environments and chooses to search for solutions upstream rather than look downstream for solutions that may only topically address the problems. Cory is also venturing further into the world of land use economics. He is interested in economic growth and development—particularly with fitting all the pieces together so that cities can make land use decisions with lasting social and economic benefits.

### HIGHLIGHTS OF EXPERIENCE

- Missing Middle Housing Analysis | Elk Grove CA
- Fountain Valley General Plan Update | Fountain Valley CA
- Community Profile and Environmental Scan | Torrance CA
- San Bernardino Countywide Plan and EIR | County of San Bernardino CA
- Redondo Beach Focused General Plan Update and EIR | Redondo Beach CA
- Corona General Plan Update and EIR | Corona CA
- Pasadena General Plan Implementation Plan | Pasadena CA
- Southeast Long Beach Specific Plan and EIR | Long Beach CA
- Development Impact Fee Study for Midtown Long Beach | Long Beach CA
- The El Camino Plan | Atascadero CA
- Centennial (Tejon Ranch) Specific Plan | Lebec CA
- Western Riverside Council of Governments' "EXPERIENCE" Feasibility Study | Western Riverside County CA
- Laguna Beach Hazard Mitigation Plan | Laguna Beach CA
- City of Colton General Plan Safety Element and Local Hazard Mitigation Plan | Colton CA
- Caltrans Sustainable Communities Grant Assistance | Glendale CA
- OCTA's Orange County Active Transportation Plan | Orange County CA
- Irwindale Nonmotorized Active Transportation Plan | Irwindale CA
- Caltrans Cycle 4 Active Transportation Program Grant Assistance | Long Beach CA
- Western Riverside Council of Governments SCAG RTP/SCS Data Review | Riverside County CA
- Santa Ana General Plan Update | Santa Ana CA
- Needles Land Use and Circulation Element Update | Needles CA
- Dana Point Housing and Safety Elements Update | Dana Point CA
- Barstow General Plan Update | Barstow CA
- Anaheim General Plan Update | Anaheim CA
- Inclusionary Housing Fee Study | Calimesa CA



### EDUCATION

- Master of Urban and Regional Planning, University of California, Irvine
- BA, Public Health Policy, University of California, Irvine
- Certificates from the International Association for Public Participation
  - » Planning for Effective Public Participation

### AFFILIATIONS

- American Planning Association

Team member since 2017



## **CORY WITTER**

**Senior Associate**

[cwitter@placeworks.com](mailto:cwitter@placeworks.com)

### **AWARDS**

- Needles Land Use and Transportation Elements | 2023 Comprehensive Plan Award of Excellence, APACA-IE
- Excellence in Research, Program in Public Health, University of California, Irvine
- Academic Excellence, Department of Planning, Policy & Design, University of California, Irvine
- Service Award, Department of Planning, Policy & Design, University of California, Irvine

### **LEADERSHIP AND COMMUNITY**

- Urban Planning Student Association (APA student chapter), President, University of California, Irvine
- Volunteer, KidWorks Inc., Santa Ana CA



## ALLISON GIFFIN

### Associate

Allison views planners as conveners and providers of tools and data to inform community-driven efforts. Allison has six years of professional planning experience managing, analyzing, and visualizing data as well as policy development and public outreach. At PlaceWorks, Allison manages data and mapping components of complex, multi-year planning projects like general plans and buildout analyses, transportation plans, Regional Housing Needs Assessments, and housing elements. She also manages standalone GIS projects, covering all aspects from client communication to methodology development and document production, and develops user friendly web and mobile mapping applications to inform decision-making and streamline planning processes. Allison is experienced with a variety of technical software programs and platforms including GIS, Adobe Creative Suite, Python, and R.

### HIGHLIGHTS OF EXPERIENCE

- San Rafael General Plan Update | San Rafael, CA
- Contra Costa General Plan Update | Contra Costa County, CA
- Los Banos SR 152 and Pioneer Road Corridor Plans | Los Banos, CA
- CCTA Community Based Transportation Plan | Richmond, CA
- Sean Leandro Shoreline Development Project CEQA Addendum | San Leandro, CA
- Elections Code Section 9212 Report for the Central Park Initiative | Livermore, CA
- East Bay Regional GHG Inventory | Alameda and Contra Costa Counties, CA
- BCAG 6th Cycle Regional Housing Needs Plan | Butte County CA
- Butte County General Plan Update | Butte County CA

### PRIOR EXPERIENCE

#### City of San Rafael, Paraprofessional Temp | 2018 - 2019

- Authored two policy analysis white papers for San Rafael City Council and worked on various mapping projects for the Community Development Department.

#### Oregon Metro, Public Involvement Intern | 2015 - 2017

- Assisted with various aspects of public involvement for two concurrent projects: an extension of Portland's light rail system into the Southwestern metro region (the Southwest Corridor Plan), and a rapid bus project (the Division Transit Project)



### EDUCATION

- Masters of City Planning, University of California, Berkeley
- Bachelors of Environmental Studies (Economics), Reed College

### AFFILIATIONS

- American Planning Association

Team member since 2019



## **ALLISON GIFFIN**

**Associate**

agiffin@placeworks.com

### **1000 Friends of Oregon, Gerhardt Intern | 2015**

- Wrote a literature review and comprehensive guide for local Oregon governments on using Fiscal Impact Analysis to compare long-term infrastructure costs and tax revenues from major land use decisions like UGB expansion or infill projects.

### **Community Cycling Center, Campaign Specialist | 2014 - 2015**

- Planned and executed major fundraising events and campaigns, designed promotional materials, and coordinated 100+ volunteers for major annual event.

## **LEADERSHIP & COMMUNITY**

- Dept. of City and Regional Planning Alternate Rep, UC Berkeley Graduate Student Assembly, Spring 2018

## **PUBLICATIONS**

- Short-Term Rentals in San Rafael, Graduate Professional Report
- Surface Parking Lot Air Rights Study, City of San Rafael Staff Report



# LAUREN WILLEY

## Associate

Lauren enjoys a range of projects from climate action and adaptation planning to comprehensive planning. Her planning approach is driven by her desire to center residents in the planning process, especially those that have historically been excluded, and is informed by her interests in technical analysis and environmental design. Her work includes greenhouse gas inventories and forecasting, climate action planning, and comprehensive planning.

Prior to joining PlaceWorks, Lauren performed research on community wildfire recovery, worked with the Parks and Recreation Department of San Francisco on equitable park planning, and supported the growth of micromobility programs in cities around the world.

## HIGHLIGHTS OF EXPERIENCE

- San Mateo General Plan Update and Climate Action Plan | San Mateo CA
- Salinas General Plan Update CAP and EIR | Salinas CA
- Laguna Beach Climate Action and Adaptation Plan | Laguna Beach CA
- Soledad General Plan Update | Soledad CA
- Livermore General Plan Update | Livermore CA
- Windsor Biennial Greenhouse Gas Inventory and Reduction Report | Windsor CA
- Contra Costa County General Plan Update | Contra Costa County CA
- Modesto General Plan Update and EIR | Modesto CA
- Solano Transportation Authority Multi-Jurisdictional Housing Element | Solano County CA
- Stockton 2035 General Plan Update | Stockton CA

## PRIOR EXPERIENCE

San Francisco Recreation and Parks Department, Capital and Planning Division | 2021 - 2022

- Provided research and design support for CEQA review, property acquisitions, grant applications, community meetings, and the City's first Equitable Park Development Plan

Lime, Government Relations | 2018 - 2020

- Supported a global team of government liaisons in launching and expanding micromobility programs.
- Managed the equity program to expand sustainable transportation options to low-income residents.



## EDUCATION

- Master of City Planning, University of California, Berkeley
- BA, Political Science, University of California, Los Angeles

## AFFILIATIONS

- American Planning Association
- American Society of Adaptation Professionals

Team member since 2022







**LAUREN WILLEY**

**Associate**

lwilley@placeworks.com



Recology South Bay, Zero Waste Division | 2018

- Supported all commercial customers and multi-family housing complexes in Mountain View, CA in their effort to comply with local waste regulations through the provision of diversion reports, educational materials, and operational assistance.



# ANGELICA GARCIA

## Associate

Angelica has experience working on a wide range of planning projects, including general plans, neighborhood plans, community outreach campaigns, housing elements, objective design standards, and zoning code updates. She has over eight years of experience and brings a wide variety of skills through her work experience and education. Her interest in urban planning stems from her desire to help create healthier communities. She enjoys working on plans that reflect the unique needs of each community. Angelica is currently the project manager for the General Plan Update in Soledad which began this year. She is also working on the General Plan Update for San Mateo, three Neighborhood focused Housing Action Plans for Stockton, and updating the Environmental Justice Elements for San Mateo County, City of Burlingame, and City of East Palo Alto.

Prior to joining Placeworks, Angelica worked as a planner in the public sector for the City of Vacaville and City of Buena Park, where she gained valuable experience in policy implementation, zoning, land use entitlements, and community planning. In her previous roles, she collaborated closely with community members and industry professionals regarding land use design and entitlements.

During her graduate program, Angelica assisted with a Complete Streets and Healthy Communities Initiative which was a collaborative effort with the City of Buena Park, residents, and other key stakeholders to prepare a safe routes to school plan.

## HIGHLIGHTS OF EXPERIENCE

- Soledad General Plan Update | Soledad CA
- Stockton Neighborhood Action Plans | Stockton CA
- Vacaville Comprehensive Housing Analysis | Vacaville CA
- San Mateo General Plan Update | San Mateo CA
- San Mateo County Multi-Jurisdictional Environmental Justice Updates | San Mateo County CA
- Hollister General Plan Update and Environmental Review | Hollister CA
- Contra Costa County General Plan Update | Contra Costa CA
- Livermore General Plan Update | Livermore CA
- Santa Rosa General Plan Update | Santa Rosa CA
- Butte County General Plan Update and EIR | Butte County CA
- Marin County US 101 Bus on Shoulder Feasibility Study | Marin County CA
- Yuba City General Plan Update | Yuba City CA
- Big Basin Visioning Project | Statewide CA
- Sunnyvale Housing Development Objective Standards | Sunnyvale CA
- Rohnert Park Housing Services | Rohnert Park CA



## EDUCATION

- Master of Planning, University of Southern California
- BA, Communication Studies, University of California, Los Angeles

## CERTIFICATIONS

- IAP2 Planning for Effective Public Participation (May 2022)

## AFFILIATIONS

- American Planning Association

Team member since 2020





**ANGELICA GARCIA**  
**Associate**  
agarcia@placeworks.com

- Richmond Mills Act Ordinance Update | Richmond CA
- Valley Transportation Authority Transit Oriented Development Visioning | Gilroy CA
- Tuolumne County Title 17 Zoning Code Comprehensive Update and ADU Ordinance | Tuolumne County CA
- Imperial County Housing Element Update | Imperial County CA
- Laguna Hills Housing Element Update | Laguna Hills CA
- Marysville Housing Element Update | Marysville CA
- Yountville Housing Element Update | Yountville CA
- Western Riverside Council of Governments Planning Support Services | Riverside CA

## ACTIVITIES

### APA 2017-Present

- Sacramento Valley APA PLAN Program 2018-2019
- California APA Conference 2017-2020
- California APA Conference 2023



## DAVID CHRISTIE AICP

### Associate

David Christie is a highly skilled associate with significant experience creating comprehensive and specific plans. His work includes research and writing for general and specific plan updates and housing element updates. He has served as an extension of staff for the cities of Redlands, Needles, Grand Terrace, Fairfield, and San Jose, acting as primary planner for complex industrial and residential projects, reviewing project plans, and managing the public counter. This experience with the public gives him a combined perspective on community outreach from the point of view of city leaders and department heads, planning consultants, and in-the-trenches counter staff. His background in planning was formed at the Southern California Association of Governments, where he assisted with the preparation of the 2016–2045 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) for the Southern California Association of Governments (SCAG).

At PlaceWorks, David assists with general and specific plans, zoning codes, and objective design standards. He researches background material and compiles data, writes reports and policy; and assists with planning community engagement as well as preparing outreach material and participating in outreach events.

### HIGHLIGHTS OF EXPERIENCE

- Redondo Beach Focused General Plan Update and EIR | Redondo Beach CA
- Inglewood General Plan Update and EIR | Inglewood CA
- Wildomar General Plan and Development Code Update and EIR
- Various Confidential Development Services Contracts throughout California | Statewide CA

### PRIOR EXPERIENCE

#### Comprehensive Plans

- Fontana General Plan Update and Environmental Justice Element | Fontana CA
- Pinole Housing, Safety, and Environmental Justice Element Updates | Pinole CA
- Eastvale General Plan Update and On-Call Planning Services | Eastvale CA
- Riverside County Housing Element Update and On-Call Planning Services | Riverside County CA
- Lakewood Housing Element Update | Lakewood CA
- Hesperia Housing Element Update | Hesperia CA
- Redlands Housing Element Update | Redlands CA

#### Specific Plans

- Barton Road Specific Plan | Grand Terrace CA
- Casa de Oro Specific Plan | San Diego County CA



### EDUCATION

- Master of Urban and Regional Planning, California Polytechnic University, San Luis Obispo
- BS, Environmental Science,, University of California, Riverside

### AFFILIATIONS

- American Planning Association
- Association of Environmental Professionals

Team member since 2023



**DAVID CHRISTIE****Associate**

dchristie@placeworks.com

- Northgate/1st Street Area Wide Plan | Idaho Falls ID
- Kodiak Borough Area Wide Plan | Kodiak AK
- Palmer Area Wide Plan | Palmer AK
- Philomath Area Wide Plan | Philomath OR
- Callow Avenue Area Wide Plan | Bremerton WA

**Agency Staff Services**

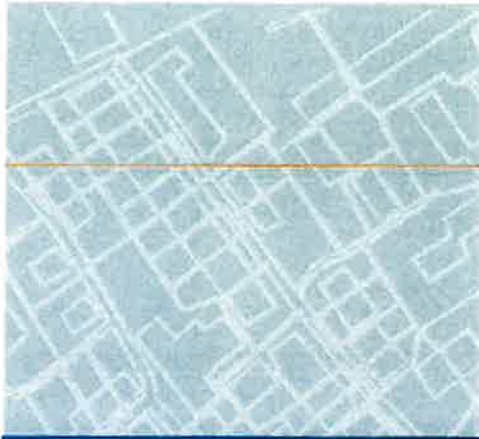
- Needles Staffing Support | Needles CA
- Redlands Staffing Support | Redlands CA
- Grand Terrace Staffing Support | Grand Terrace CA
- Fairfield Contract Planning Services | Fairfield CA
- San Jose Contract Planning Services | San Jose CA

**CEQA Environmental Compliance**

- Foothill Commerce Center EIR | Fontana CA
- Rancho del Prado EIR | Colton CA
- Winchester Community Plan EIR | Riverside County CA
- Bergamot Specific Plan ISMND | Redlands CA
- Heritage Specific Plan ISMND | Redlands CA
- Sevilla II ISMND | Coachella CA

**Other**

- Southern California Association of Governments 2016–2045 RTP/SCS | SCAG Region CA
- Highway 74 Multi Modal Transit Plan | Riverside County CA
- US 90 Texas Corridor Study | State of Texas
- US 82 Texas Corridor Study | State of Texas
- Johnstown Wayfinding Plan | Johnstown CO
- Climate Action Plan for Pebbly Beach Desalination Plant | Avalon CA
- CBDG Funding Assistance | Menifee CA
- Drake Park Master Plan | Henderson NV



# LETTERS OF RECOMMENDATION







# City of Emeryville

INCORPORATED 1896

1333 Park Avenue

Emeryville, California 94608-3517

Tel: (510) 596-4300 | Fax: (510) 596-4389

January 9, 2023

**Subject: Letter of Recommendation for PlaceWorks**

To whom it may concern:

I would like to take a moment to recommend the PlaceWorks housing team. I worked with PlaceWorks as the Staff Project Manager for the City of Emeryville 2023-2031 Housing Element. City staff found that PlaceWorks produces high-quality work with minimal revisions, is very responsive to questions and comments, and consistently exceeded our expectations. PlaceWorks also submitted our 2023-2031 Housing Element for an APA Northern Section Award of Excellence in the Best Practices category and won! PlaceWorks staff have also previously administered the City's Below Market Rate Housing Program, so have worked with City staff in various capacities in multiple divisions.

I have worked directly with Nicole West, Jennifer Gastelum, Mark Teague and others at PlaceWorks and found them to be professional, friendly, and exceptionally knowledgeable about housing work. The staff at PlaceWorks has clearly demonstrated that they are well qualified to complete the tasks requested by the City, and their work product deliverables have been of a high quality (as noted above in receiving the APA Northern Section Award of Excellence in the Best Practices category for our Housing Element).

In summary, I have found the PlaceWorks team to be highly qualified professionals who work hard and keep an open line of communication. Please feel free to contact me as I would welcome the opportunity to explain why I recommend them so highly.

Sincerely,

Navarre Oaks  
Senior Planner, City of Emeryville





**CITY OF VACAVILLE**  
COMMUNITY DEVELOPMENT DEPARTMENT

650 Merchant Street • Vacaville, CA 95688 • [CityofVacaville.gov](http://CityofVacaville.gov) • 707.449.5140

January 4, 2024

**Subject: Letter of Recommendation for PlaceWorks**

To Whom It May Concern:

I would like to take a moment to recommend the PlaceWorks housing team. My staff and I worked with PlaceWorks on the City of Vacaville's 2023-2031 Housing Element. We found that PlaceWorks produces high-quality work with minimal revisions, is very responsive to questions, and always exceeds our expectations.

I worked directly with Jennifer Gastelum, Cynthia Walsh, Nicole West, Mark Teague, and others at PlaceWorks on several projects and found them to be professional, friendly, and exceptionally knowledgeable about housing work. The staff at PlaceWorks has demonstrated that they are well qualified to complete the tasks requested by the City, and their work product deliverables have been of a high quality.

In summary, I have found the PlaceWorks team to be highly qualified professionals who work hard and keep an open line of communication. Please feel free to contact me as I would welcome the opportunity to explain why I recommend them so highly. I may be reached by email at [erin.morris@cityofvacaville.com](mailto:erin.morris@cityofvacaville.com) or by phone at 707/ 449-5307.

Sincerely,

Erin Morris, AICP  
Community Development Director





101 Parkshore Drive, Suite 200  
Folsom, California 95630  
t 916.245.7500

[www.PlaceWorks.com](http://www.PlaceWorks.com)

ORANGE COUNTY • BAY AREA • SACRAMENTO • CENTRAL COAST • LOS ANGELES • INLAND EMPIRE

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

**EXHIBIT "C" – FISCAL PROVISIONS**

1. **CONTRACTOR'S FINANCIAL RECORDS.** Contractor shall keep financial records for funds received hereunder, separate from any other funds administered by Contractor, and maintained in accordance with Generally Accepted Accounting Principles and Procedures and the Office of Management and Budget's Cost Principles.

2. **INVOICES.**

2.1 Contractor's invoices shall be submitted in arrears on a monthly basis, or such other time that is mutually agreed upon in writing, and shall be itemized and formatted to the satisfaction of the County.

2.2 County shall make payment within 20 business days of an undisputed invoice for the compensation stipulated herein for supplies delivered and accepted or services rendered and accepted, less potential deductions, if any, as herein provided. Payment on partial deliverables may be made whenever amounts due so warrant or when requested by the Contractor and approved by the Assistant Purchasing Agent.

3. **AUDIT REQUIREMENTS AND AUDIT EXCEPTIONS**

3.1 Contractor warrants that it shall comply with all audit requirements established by County and will provide a copy of Contractor's Annual Independent Audit Report, if applicable.

3.2 County may conduct periodic audits of Contractor's financial records, notifying Contractor no less than 48 hours prior to scheduled audit. Said notice shall include a detailed listing of the records required for review. Contractor shall allow County, or other appropriate entities designated by County, access to all financial records pertinent to this Agreement.

3.3 Contractor shall reimburse County for audit exceptions within 30 days of written demand or shall make other repayment arrangements subject to the approval of County.

4. **BUDGET.** The Contractor shall submit, in advance, a detailed budget, in the format provided by County for review and approval by the County. Contractor shall be compensated only for expenses included in the approved budget. Modification to the budget must be approved in advance by the County.

5. **EXPENDITURE OF FUNDS.**

5.1 Funds payable through this agreement shall not be used to purchase food or promotional merchandise or to attend conferences unless specifically approved in the budget.

5.2 County reserves the right to refuse payment to Contractor or disallow costs for any expenditure determined to be unreasonable, out of compliance, or inappropriate to the services provided hereunder.

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

**EXHIBIT "D" – COMPLIANCE PROVISIONS**

1. **INFORMATION INTEGRITY AND SECURITY.** Contractor shall immediately notify County of any known or suspected breach of personal, sensitive and confidential information related to Contractor's work under this Agreement.
  
2. **NON-DISCRIMINATION.** Contractor shall not unlawfully discriminate against any qualified worker or recipient of services because of race, religious creed, color, sex, sexual orientation, national origin, ancestry, physical disability, mental disability, medical condition, marital status or age.
  
3. **DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**
  - 3.1 The Contractor certifies to the best of its knowledge and belief, that it and its subcontractors:
    - A. Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
  
    - B. Have not, within a three-year period preceding this Agreement, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction; violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  
    - C. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in the preceding paragraph; and
  
    - D. Have not, within a three-year period preceding this Agreement, had one or more public transactions terminated for cause or default.
  
  - 3.2 Contractor shall report immediately to County, in writing, any incidents of alleged fraud and/or abuse by either Contractor or Contractor's subcontractor. Contractor shall maintain any records, documents, or other evidence of fraud and abuse until otherwise notified by County.
  
4. **AGREEMENTS IN EXCESS OF \$100,000.** Contractor shall comply with all applicable orders or requirements issued under the following laws:
  - 4.1 Clean Air Act, as amended (42 USC 1857).
  - 4.2 Clean Water Act, as amended (33 USC 1368).
  - 4.3 Federal Water Pollution Control Act, as amended (33 USC 1251, et seq.)
  - 4.4 Environmental Protection Agency Regulations (40 CFR and Executive Order 11738).

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

**5. INDEMNIFICATION AND HOLD HARMLESS.**

Contractor shall indemnify and defend County and its officers, employees, and agents against and hold them harmless from any and all claims, losses, damages, and liability for damages, including attorney's fees and other costs of defense incurred by County, whether for damage to or loss of property, or injury to or death of person, including properties of County and injury to or death of County officials, employees or agents, arising out of, or connected with Contractor's operations hereunder or the performance of the work described herein, unless such damages, loss, injury or death is caused solely by the negligence of County.

Contractor's obligations under this Section shall survive the termination of the Agreement.

**6. STANDARD OF CARE.** Contractor represents that it is specially trained, licensed, experienced and competent to perform all the services, responsibilities and duties specified herein and that such services, responsibilities and duties shall be performed, whether by Contractor or designated subcontractors, in a manner according to generally accepted practices.

**7. INTEREST OF CONTRACTOR.** Contractor assures that neither it nor its employees has any interest, and that it shall not acquire any interest in the future, direct or indirect, which would conflict in any manner or degree with the performance of services hereunder.

**8. DUE PERFORMANCE – DEFAULT.** Each party agrees to fully perform all aspects of this agreement. If a default to this agreement occurs then the party in default shall be given written notice of said default by the other party. If the party in default does not fully correct (cure) the default within 15 days of the date of that notice (i.e. the time to cure) then such party shall be in default. The time period for corrective action of the party in default may be extended in writing executed by both parties, which must include the reason(s) for the extension and the date the extension expires.

Notice given under this provision shall specify the alleged default and the applicable Agreement provision and shall demand that the party in default perform the provisions of this Agreement within the applicable time period. No such notice shall be deemed a termination of this Agreement, unless the party giving notice so elects in that notice, or so elects in a subsequent written notice after the time to cure has expired.

**9. INSURANCE.**

9.1 Contractor shall procure and maintain Workers' Compensation Insurance for all of its employees.

9.2 Contractor shall procure and maintain Comprehensive Public Liability Insurance, both bodily injury and property damage, in an amount of not less than one million dollars (\$1,000,000) combined single limit coverage per occurrence, including but not limited to endorsements for the following coverage: personal injury, premises-operations, products and completed operations, blanket contractual, and independent contractor's liability.

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

9.3 Contractor shall procure and maintain Comprehensive Automobile Liability Insurance, both bodily injury and property damage, on owned, hired, leased and non-owned vehicles used in connection with Contractor's business in an amount of not less than one million dollars (\$1,000,000) combined single limit coverage per occurrence.

9.4 Contractor shall procure and maintain Professional Liability Insurance for the protection against claims arising out of the performance of services under this Agreement caused by errors, omissions or other acts for which Contractor is liable. Said insurance shall be written with limits of not less than one million dollars (\$1,000,000).

9.5 Contractor shall not commence work under this Agreement until it has obtained all the insurance required hereinabove and submitted to County certificates of insurance naming the County of Lake as additional insured. Contractor agrees to provide to County, at least 30 days prior to expiration date, a new certificate of insurance.

9.6 In case of any subcontract, Contractor shall require each subcontractor to provide all of the same coverage as detailed hereinabove. Subcontractors shall provide certificates of insurance naming the County of Lake as additional insured and shall submit new certificates of insurance at least 30 days prior to expiration date. Contractor shall not allow any subcontractor to commence work until the required insurances have been obtained.

9.7 For any claims related to the work performed under this Agreement, the Contractor's insurance coverage shall be primary insurance as to the County, its officers, officials, employees, agents and volunteers. Any insurance or self-insurance maintained by County, its officers, officials, employees, agents or volunteers shall be in excess of the Contractor's insurance and shall not contribute with it.

9.8 The Commercial General Liability and Automobile Liability Insurance must each contain, or be endorsed to contain, the following provision:

The County, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds and shall be added in the form of an endorsement to Contractor's insurance on Form CG 20 10 11 85. Contractor shall not commence work under this Agreement until Contractor has had delivered to County the Additional Insured Endorsements required herein.

Coverage shall not extend to any indemnity coverage for the active negligence of the additional insured in any case where an agreement to indemnify the additional insured would be invalid under subdivision (b) of California Civil Code Section 2782.

9.9 Insurance coverage required of Contractor under this Agreement shall be placed with insurers with a current A.M. Best rating of no less than A: VII.

Insurance coverage in the minimum amounts set forth herein shall not be construed to relieve the Contractor for liability in excess of such coverage, nor shall it preclude County from taking other action as is available to it under any other provision of this Agreement or applicable law. Failure of County to enforce in a timely manner any of the provisions of this section shall not act as a waiver to enforcement of any of these provisions at a later date.

**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

9.10 Any failure of Contractor to maintain the insurance required by this section, or to comply with any of the requirements of this section, shall constitute a material breach of the entire Agreement.

10. **ATTORNEY'S FEES AND COSTS.** If any action at law or in equity is necessary to enforce or interpret the terms of this Agreement, the prevailing party shall be entitled to reasonable attorney's fees, costs, and necessary disbursements in addition to any other relief to which such party may be entitled.

11. **ASSIGNMENT.** Contractor shall not assign any interest in this Agreement and shall not transfer any interest in the same without the prior written consent of County except that claims for money due or to become due Contractor from County under this Agreement may be assigned by Contractor to a bank, trust company, or other financial institution without such approval. Written notice of any such transfer shall be furnished promptly to County. Any attempt at assignment of rights under this Agreement except for those specifically consented to by both parties or as stated above shall be void.

12. **PAYROLL TAXES AND DEDUCTIONS.** Contractor shall promptly forward payroll taxes, insurances, and contributions to designated governmental agencies.

13. **INDEPENDENT CONTRACTOR.** It is specifically understood and agreed that, in the making and performance of this Agreement, Contractor is an independent contractor and is not an employee, agent or servant of County. Contractor is not entitled to any employee benefits. County agrees that Contractor shall have the right to control the manner and means of accomplishing the result contracted for herein.

Contractor is solely responsible for the payment of all federal, state and local taxes, charges, fees, or contributions required with respect to Contractor and Contractor's officers, employees, and agents who are engaged in the performance of this Agreement (including without limitation, unemployment insurance, social security and payroll tax withholding.)

14. **OWNERSHIP OF DOCUMENTS.** All non-proprietary reports, drawings, renderings, or other documents or materials prepared by Contractor hereunder are the property of County.

15. **SEVERABILITY.** If any provision of this Agreement is held to be unenforceable, the remainder of this Agreement shall be severable and not affected thereby.

16. **ADHERENCE TO APPLICABLE DISABILITY LAW.** Contractor shall be responsible for knowing and adhering to the requirements of Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act, (42 U.S.C. Sections 12101, et seq.). California Government Code Sections 12920 et seq., and all related state and local laws.

17. **HIPAA COMPLIANCE.** Contractor will adhere to Titles 9 and 22 and all other applicable Federal and State statutes and regulations, including the Health Insurance Portability



**AGREEMENT FOR  
Lake County Housing Action and Implementation Plan Consultant Services**

and Accountability Act of 1996 (HIPAA) and will make his best efforts to preserve data integrity and the confidentiality of protected health information.

- 18. SAFETY RESPONSIBILITIES.** Contractor will adhere to all applicable CalOSHA requirements in performing work pursuant to this Agreement. Contractor agrees that in the performance of work under this Agreement, Contractor will provide for the safety needs of its employees and will be responsible for maintaining the standards necessary to minimize health and safety hazards.
- 19. JURISDICTION AND VENUE.** This Agreement shall be construed in accordance with the laws of the State of California and the parties hereto agree that venue of any action or proceeding regarding this Agreement or performance thereof shall be in Lake County, California. Contractor waives any right of removal it might have under California Code of Civil Procedure Section 394.
- 20. RESIDENCY.** All independent contractors providing services to County for compensation must file a State of California Form 590, certifying California residency or, in the case of a corporation, certifying that they have a permanent place of business in California.
- 21. NO THIRD-PARTY BENEFICIARIES.** Nothing contained in this Agreement shall be construed to create, and the parties do not intend to create, any rights in or for the benefit of third parties.
- 22. PUBLIC RECORDS ACT.** Contractor is aware that this Agreement and any documents provided to the County may be subject to the California Public Records Act and may be disclosed to members of the public upon request. It is the responsibility of the Contractor to clearly identify information in those documents that s/he considers to be confidential under the California Public Records Act. To the extent that the County agrees with that designation, such information will be held in confidence whenever possible. All other information will be considered public.