



21 Elements 2017/2019 Work Plan

Objectives of 21 Elements

21 Elements is a nationally recognized collaboration among the County and all 20 cities in San Mateo County. The accomplishments of 21 Elements are significant and include collaboration on housing element updates, shared research, joint work on best practices, collaboration with non-profits and experts involved in the field of housing, coordination with local, regional and state agencies, and providing assistance on pressing housing issues.

21 Elements has assisted all the jurisdictions in San Mateo County in achieving State-certified housing elements for both the RHNA 4 planning period, 2007-2014, and the RHNA 5 planning period, 2015-2023. 21 Elements has also facilitated implementation of a countywide nexus study that is being used by the fourteen participating cities and San Mateo County to establish legally defensible development impact fees and regulations.



More recently, 21 Elements has produced products, conducted meetings, provided best practices and undertaken other tasks to assist jurisdictions on housing issues related to short-term vacation rentals, tenant displacement, linkage fees, accessory dwelling units (ADUs), etc. In addition, 21 Elements has closely coordinated with other countywide efforts related to housing and transportation, including Home for All, the City/County Association of Governments of San Mateo County (C/CAG), San Mateo County Department of Housing (DOH), etc. The graphic on the next page is illustrative of the many local, regional and state agencies 21 Elements collaborates with to address housing needs and challenges in San Mateo County.



Similar to the previous work of 21 Elements, the effort over the next two years is structured so that a shared funding approach can be developed between the jurisdictions, C/CAG (City/County Association of Governments of San Mateo County) and San Mateo County (Department of Housing — DOH). The process is intended to continue to help jurisdictions:

- (1) **Save money, time and resources** by sharing costs between all jurisdictions with C/CAG and DOH.
- (2) **Maintain relationships** with non-profits and affordable housing advocates, HCD, DOH, C/CAG, ABAG, etc.
- (3) **Share information and tailor choices to jurisdiction needs** while providing a structure for the comprehensive sharing and discussion of housing information, policy choices and best practices (and options) tailored to a range of choices to fit each jurisdiction's conditions and needs.



The intent of this effort will be to:

- (1) Provide the 21 jurisdictions in San Mateo County with products and assistance to implement their housing elements in order to **maintain Housing Element certification**.
- (2) Continue the work of 21 Elements in **providing resources in a long-term, non-advocacy role** to facilitate discussion and to address important housing issues in San Mateo County.
- (3) Continue to **function as an extension of jurisdiction staff** to quickly respond to housing issues and questions as they arise and to provide a clearinghouse of housing information.

Sources Used to Develop the Scope of Services

The materials that follow identify ways to share resources and information, and to achieve cost-efficiencies. The work tasks evolved from: (a) discussions and feedback from jurisdictions from feedback surveys and discussions held at several 21 Elements meetings; (b) a review of jurisdiction housing elements; and, (c) a review of the strategies identified through the countywide “Home for All” process.

The work tasks identified in this scope of services also build-upon the work undertaken during 2016-2017, including:

- (1) Accessory Dwelling Units (ADUs)
- (2) Displacement
- (3) Short-Term Vacation Rentals
- (4) Nexus Study Implementation
- (5) Informational and Outreach Materials
- (6) Special Projects ((Transportation, RHNA Sharing, AHSC Funding, etc.)
- (7) 21 Elements Meetings, Support and Coordination with Other Activities Related to Housing



Overall Organization of Work Tasks

As in the past, 21 Elements will provide the jurisdictions with a tailored set of templates, methodologies, baseline data, comparative information, key findings, write-ups and best practices (model policies, programs and implementing tools) to successfully address housing issues. In addition, very specific products will be developed that can be expanded upon over time to maintain accuracy and provide a easy way to supplement the product for use by a greater number of jurisdictions. For example, one of the work tasks identified is the development of an ADU Center (**Launch Accessory Dwelling Unit Web Portal**), which will be a website that serves as a central information hub for members of the public who want to build ADUs. The website will include information on regulations, costs, rents, etc. that can be supplemented with jurisdiction-specific information.

Project Management Overview

The work will be closely coordinated with and will be directed by the San Mateo County Department of Housing and the Technical Advisory Committee (TAC), composed of representatives of all twenty-one jurisdictions. Direction will include the review and approval of product content, scheduling and other aspects of the work to ensure it creates significant value for the jurisdictions. Copies of the final document(s) will be provided electronically to be compatible with each jurisdiction's system and programs.

As with work assisting jurisdictions on their housing elements, there is a significant amount of overlap among the work tasks and products, as well as the benefits of collaboration with city staff, DOH, San Mateo County staff. For this reason, and to further maintain the flexibility of 21 Elements to respond to each jurisdiction's unique needs and situation, it is important to view this Scope of Services as a road map that may be marginally adjusted to make sure all jurisdiction needs are addressed in a comprehensive and timely manner.

Jeffery C. Baird, AICP, will be working on all of the tasks identified in the Scope of Services and will serve as the overall Project Manager. Joshua Abrams, AICP, will provide day-to-day project management and will be the primary contact for the jurisdictions, as has been done during the previous 21 Elements work. Josh Abrams will also be involved in all tasks.



By way of background, Baird + Driskell Community Planning (B+D) has been involved in 21 Elements since its inception almost 10 years ago, working essentially as staff for 21 Elements during the RHNA 4 and RHNA 5 planning periods. B+D combine a strong background in all aspects of community planning, including general and specific plans, numerous State-certified housing elements, and a technical background in all aspects of affordable housing and community planning, regulations and design. B+D also has a unique strength in public information and participation processes.

The next section describes the tasks and products in more detail. A more detailed examination of the project schedule and budget is included at the end of the Scope of Services.

Work Task Descriptions

For each task described below there is description of associated sub-tasks and products to be prepared for 21 Elements over the next two years (2017-2019). The budget discussion at the end of this Scope of Services defines the anticipated level of effort associated with each task. In addition, the products identified will be completed consistent with the schedule. A schedule graphic is also provided at the end of this Scope of Services to illustrate the sequence of work.

It is recommended that year two tasks be reviewed and modified as needed in April of 2018 to provide a more up-to-date review of work priorities at that time. The review would consider year one tasks status, new housing issues that may have arisen over this next year (2017-2018) and further discussion and consideration of possible year two (2018-2019) priorities as identified in this Scope of Services.

Task 1.0

ACCESSORY DWELLING UNITS

- 1.1 **Conduct ADU Focus Groups** — Attend and/or conduct focus group meetings of the following stakeholders: (1) people interested in building ADUs; (2) architects, designers and builders of ADUs; and, (3) representatives of jurisdiction planning staff. Discuss essential materials, areas of friction and other ways assistance can be provided in a useful way. Prepare summary of findings for use with ADU products. (Summer 2017)
- 1.2 **Produce Design and Process Manual for ADUs** — Complete a Design and Process Manual to guide homeowners from initial interest to construction. Can be tailored with jurisdiction specific information. Link the Design and Process Manual with the ADU Web Portal and other ADU products. (Fall 2017)
- 1.3 **Launch Accessory Dwelling Unit Web Portal** — Build a website that serves as a central information hub for members of the public who want to build ADUs. Include information on regulations, costs, rents, etc. (Winter 2017/2018)
- 1.4 **Host ADU Showcase** — Coordinate an event where one or more builders can construct a model ADU in a publically accessible location. An RFP will be released asking builders to absorb the cost in exchange for the publicity. (Winter 2017/2018)
- 1.5 **Produce ADU Picture Book** — Contact homeowners with ADUs and ask them to share photos and stories. Collect material on the Web Portal and in a printed brochure. (Fall 2017)
- 1.6 **Develop ADU Amnesty Implementation Materials** — Produce materials that will allow jurisdictions to understand the key steps and regulatory options for developing an ADU Amnesty program. (Winter 2017/2018)
- 1.7 **Undertake Additional ADU Tasks/Products** — 21 Elements will undertake a number of other tasks to support the creation of ADUs, such as conducting surveys of fees. Potentially produce ministerial design review guidelines and ADU awards program, etc. (Ongoing)

Task 2.0

SHORT-TERM VACATION RENTALS

- 2.1 **Explore Countywide/Jurisdiction Specific Vacation Rental Regulatory Framework** — If there is sufficient interest, develop a regulatory framework for cities that are interested in jointly regulating short term vacation rentals. The system would allow individual cities to tailor their own regulations within a central framework. (Spring 2018)

Task 3.0

DISPLACEMENT

- 3.1 **Produce Additional Displacement Products** — Work with individual jurisdictions to assist in producing materials to support community discussions about tenant displacement and to identify policy options to address local issues and concerns. Consider other products. (Ongoing)
- 3.2 **Summarize and Publicize Local Efforts** — Summarize different policy approaches that jurisdictions are using to address lower and moderate income tenant displacement. This could include surveys, fact sheets and a webinar. (Spring 2018)

Task 4.0

SPECIAL NEEDS

- 4.1 **Conduct Senior Housing Planning** — Convene a work group to discuss options for meeting the growing needs for Senior Housing. Include information about universal design. (Spring 2019)
- 4.2 **Conduct Housing for People Living with Disabilities Planning** — Convene a work group to discuss options for meeting the needs for People Living with Disabilities Housing. Use information gathered through the Assessment of Fair Housing. (Spring 2019)

Task 5.0

FACILITATING NEW CONSTRUCTION

- 5.1 **Produce New Trends and Methods Material** — Produce background material on the latest trends in modular, pre-fab and micro-units, including case studies. Host a webinar on the topic. Focus on what jurisdictions need to know to work with new technologies (e.g. how do you do inspections with modular). (Summer 2018)
- 5.2 **Produce By-right Development Material** — Produce case study and webinar highlighting accomplishments. Identify if other products will be useful. (Fall 2018)
- 5.3 **Produce Affordable Housing Overlay Zone Material** — Produce case study and webinar highlighting accomplishments. Identify if other products will be useful. (Spring 2018)

Task 6.0

NEXUS STUDY — IMPACT FEES

- 6.1 **Conduct Impact Fee Implementation Surveys** — Conduct quarterly survey of jurisdiction implementation status. (Ongoing, with an annual report)
- 6.2 **Facilitate Meeting Impact Fee Reporting Requirements** — Produce material to help cities complete five-year reports. Assist jurisdictions in completing annual reports. (Spring 2019)
- 6.3 **Update Summary of Impact Fee Policies** — Update 21 Elements' summary of inclusionary zoning and impact fee policies for San Mateo, Santa Clara and Alameda County. Identify how much money has been collected and what the money was used for. (Twice a year)
- 6.4 **Respond to Speaker Requests on Impact Fees** — Present at meetings as requested by cities. (Ongoing)



Task 7.0

INFORMATIONAL/OUTREACH MATERIALS

- 7.1 **Produce County Trends Report** — Produce a summary of housing trends in the county. Information will include housing units produced or proposed, impact fee collected and new policies passed. (Spring 2018)
- 7.2 **Summarize Legislative Initiatives** — Produce an annual report that summarizes bills related to housing. Keep stakeholders informed about progress on key bills. (Summaries in March 2018 and March 2019, then ongoing)
- 7.3 **Conduct Business Community Outreach** — Work with the Chamber of Commerce, SAMCEDA and Home for All to organize the business community to support new housing. (Ongoing)
- 7.4 **Support Decision Maker Events** — Coordinate with Home for All and Housing Leadership Council to educate decision makers about housing issues. (Twice a year, during housing leadership day and affordable housing week)
- 7.5 **Support Community Development Directors Meetings** — Continue to support a regular meeting of Community Development Directors to discuss housing and related topics. (Ongoing)
- 7.6 **Produce Handout on How Housing Fits** — Present a continuum of housing design, types, density ranges and other factors for fitting in, including examples and descriptions, benefits, considerations, housing need, etc. of various forms of housing along a housing continuum. (Spring 2018)
- 7.7 **Produce Handout on Affordable Housing** — Cover examples and challenges of building affordable housing and how it is developed, designed, financed, who occupancies affordable housing, housing needs, etc. (Summer 2018)



Task 8.0

TRANSPORTATION AND HOUSING

- 8.1 **Update Parking Policies Summary** — Update summary on parking policies for jurisdictions. (Fall 2018)
- 8.2 **Assist with AHSC White Paper** — Assist with white paper on better positioning the county to receive AHSC funding. (Summer/Fall 2017)
- 8.3 **Host AHSC Lessons Learned Meeting** — Host a follow up meeting to discuss lessons learned and develop an action plan to improve the chances of receiving AHSC funding. (Summer 2017)
- 8.4 **Educate Planners about Transportation Issues** – Host speakers and produce material to ensure that jurisdiction staff are informed about relevant transportation issues. (Annual)
- 8.5 **Assist C/CAG with Additional Projects** – As needed, assist C/CAG staff with projects such as collecting data, conducting outreach, etc. (Ongoing)

TASK 9.0

OTHER TASKS

- 9.1 **Support Automation of Reporting Requirements** — Support work to automate the housing production reporting process. (Ongoing)
- 9.2 **Host RHNA Sharing Follow up** — Work with stakeholders to develop policy proposals to facilitate sharing of resources and trading of RHNA. (Summer 2017)



Task 10.0

21 ELEMENTS WEBSITE, MEETINGS AND OTHER TASKS

- 10.1 **Facilitate 21 Elements Meetings** — Conduct 21 Elements meetings every three to four months. (Ongoing)
- 10.2 **Upgrade Website** — Reorganize the 21 Elements website to make it easier to find material and align topics with other county initiatives. (Winter 2019)
- 10.3 **Conduct Organizational Development** — Update contact list, manage day-to-day operations, etc. (Ongoing)
- 10.4 **Respond to Other Requests** (Ongoing)

TASK 11.0

COORDINATE WITH HOME FOR ALL

- 11.1 **Attend Home for All Meetings** — Attend Policy and Legislative Work Group and Steering Committee meetings. (Ongoing)
- 11.2 **Assist with Other Home for All Tasks** — Assist Home for All in implementing their work plans. (Ongoing)

Summary by Tasks By Topic

ACCESORY DWELLING UNITS		
1.1	Conduct ADU Focus Groups	Summer 2017
1.2	Produce Design and Process Manual for ADUs	Fall 2017
1.3	Launch Accessory Dwelling Unit Web Portal	Winter 2017/2018
1.4	Host ADU Showcase	Winter 2017/2018
1.5	Produce ADU Picture Book	Fall 2017
1.6	Develop ADU Amnesty Implementation Materials	Winter 2017/2018
1.7	Undertake Additional ADU Tasks/Products	Ongoing
SHORT-TERM VACATION RENTALS		
2.1	Explore Vacation Rental Regulatory Framework	Spring 2018
DISPLACEMENT		
3.1	Produce Additional Displacement Products	Ongoing
3.2	Summarize and Publicize Local Efforts	Spring 2018
SPECIAL NEEDS		
4.1	Conduct Senior Housing Planning	Spring 2019
4.2	Conduct Housing for People Living with Disabilities Planning	Spring 2019
FACILITATING NEW CONSTRUCTION		
5.1	Produce New Trends and Methods Material	Summer 2018
5.2	Produce By-right Development Material	Fall 2018
5.3	Produce Affordable Housing Overlay Zone Material	Spring 2018
NEXUS STUDY IMPACT FEES		
6.1	Conduct Impact Fee Implementation Surveys	Ongoing
6.2	Facilitate Meeting Impact Fee Reporting Requirements	Spring 2019
6.3	Update Summary of Impact Fee Policies	Twice a year
6.4	Respond to Speaker Requests on Impact Fees	Ongoing



INFORMATIONAL/OUTREACH MATERIALS

7.1	Produce County Trends Report	Spring 2018
7.2	Summarize Legislative Initiatives	Annually
7.3	Conduct Business Community Outreach	Ongoing
7.4	Support Decision Maker Events	Ongoing
7.5	Support CD Directors Meetings	Ongoing
7.6	Produce Handout on How Housing Fits	Spring 2018
7.7	Produce Handout on Affordable Housing	Summer 2018

TRANSPORTATION AND HOUSING

8.1	Update Parking Policies Summary	Fall 2018
8.2	Assist with AHSC White Paper	Summer/Fall 2017
8.3	Host AHSC Lessons Learned Meeting	Fall 2017
8.4	Educate Planners about Transportation Issues	Annual
8.5	Assist C/CAG with Additional Projects	Ongoing

OTHER TASKS

9.1	Support Automation of Reporting Requirements	Ongoing
9.2	Host RHNA Sharing Follow up	Summer 2017

21 ELEMENTS WEBSITE, MEETINGS AND OTHER TASKS

10.1	Facilitate 21 Elements Meetings	Ongoing
10.2	Upgrade Website	Winter 2019
10.3	Conduct Organizational Development	Ongoing
10.4	Respond to Other Requests	Ongoing

COORDINATE WITH HOME FOR ALL

11.1	Attend Home for All Meetings	Ongoing
11.2	Assist with Other Home for All Tasks	Ongoing



Schedule

The schedule for task completion dates is summarized in the table below. The schedule graphic attached at the end of this Scope of Services illustrates the sequence of products and the scheduling priorities for 21 Elements over the next two years.

Task Timeline 2017-2019

2017		
1.1	Conduct ADU Focus Group	Summer 2017
9.2	Host RHNA Sharing Follow up	Summer 2017
8.2	Assist with AHSC White Paper	Summer/Fall 2017
8.3	Host AHSC Lessons Learned Meeting	Fall 2017
1.2	Produce Design and Process Manual for ADUs	Fall 2017
1.5	Produce ADU Picture Book	Fall 2017
2018		
1.3	Launch Accessory Dwelling Unit Web Portal	Winter 2017/2018
1.4	Host ADU Showcase	Winter 2017/2018
1.6	Develop ADU Amnesty Implementation Materials	Winter 2017/2018
2.1	Explore Vacation Rental Regulatory Framework	Spring 2018
3.2	Summarize and Publicize Local Efforts	Spring 2018
5.3	Produce Affordable Housing Overlay Zone Material	Spring 2018
7.1	Produce County Trends Report	Spring 2018
7.6	Produce Handout on How Housing Fits	Spring 2018
5.1	Produce New Trends and Methods Material	Summer 2018
7.7	Produce Handout on Affordable Housing	Summer 2018
5.2	Produce By-right Development Material	Fall 2018
8.1	Update Parking Policies Summary	Fall 2018



2019		
10.2	Upgrade Website	Winter 2018/2019
4.2	Conduct Housing for People Living with Disabilities Planning	Spring 2019
6.2	Facilitate Meeting Impact Fee Reporting Requirements	Spring 2019
4.1	Conduct Senior Housing Planning	Spring 2019

Annual, Ongoing		
7.2	Summarize Legislative Initiatives	Annual
8.4	Educate Planners about Transportation Issues	Annual
6.3	Update Summary of Impact Fee Policies	Twice a year
1.7	Undertake Additional ADU Tasks and Products	Ongoing
3.1	Produce Additional Displacement Products	Ongoing
6.1	Conduct Impact Fee Implementation Surveys	Ongoing
6.4	Respond to Speaker Requests on Impact Fees	Ongoing
7.3	Conduct Business Community Outreach	Ongoing
7.4	Support Decision Maker Events	Ongoing
7.5	Support CD Directors Meetings	Ongoing
8.5	Assist C/CAG with Additional Projects	Ongoing
9.1	Support Automation of Reporting Requirements	Ongoing
10.1	Facilitate 21 Elements Meetings	Ongoing
10.3	Conduct Organizational Development	Ongoing
10.5	Respond to Other Requests	Ongoing
11.1	Attend Home for All Meetings	Ongoing
11.2	Assist with Other Home for All Tasks	Ongoing

Distribution of Hours and Work

Below is a summary of the distribution of hours by task.

Summary Hours by Tasks

ACCESORY DWELLING UNITS		
1.1	Conduct ADU Focus Groups	80 hours
1.2	Produce Design and Process Manual for ADUs	240 hours
1.3	Launch Accessory Dwelling Unit Web Portal	240 hours
1.4	Host ADU Showcase	80 hours
1.5	Produce ADU Picture Book	80 hours
1.6	Develop ADU Amnesty Implementation Materials	80 hours
1.7	Undertake Additional ADU Tasks/Products	240 hours
		1,040 hours
SHORT-TERM VACATION RENTALS		
2.1	Explore Vacation Rental Regulatory Framework	200 hours
		200 hours
DISPLACEMENT		
3.1	Produce Additional Displacement Products	200 hours
3.2	Summarize and Publicize Local Efforts	40 hours
		240 hours
SPECIAL NEEDS		
4.1	Conduct Senior Housing Planning	200 hours
4.2	Conduct Housing for People Living with Disabilities Planning	120 hours
		320 hours
FACILITATING NEW CONSTRUCTION		
5.1	Produce New Trends and Methods Material	80 hours
5.2	Produce By-right Development Material	80 hours
5.3	Produce Affordable Housing Overlay Zone Material	80 hours
NEXUS STUDY IMPACT FEES		
6.1	Conduct Impact Fee Implementation Surveys	40 hours
6.2	Facilitate Meeting Impact Fee Reporting Requirements	40 hours
6.3	Update Summary of Impact Fee Policies	40 hours
6.4	Respond to Speaker Requests on Impact Fees	40 hours
		160 hours

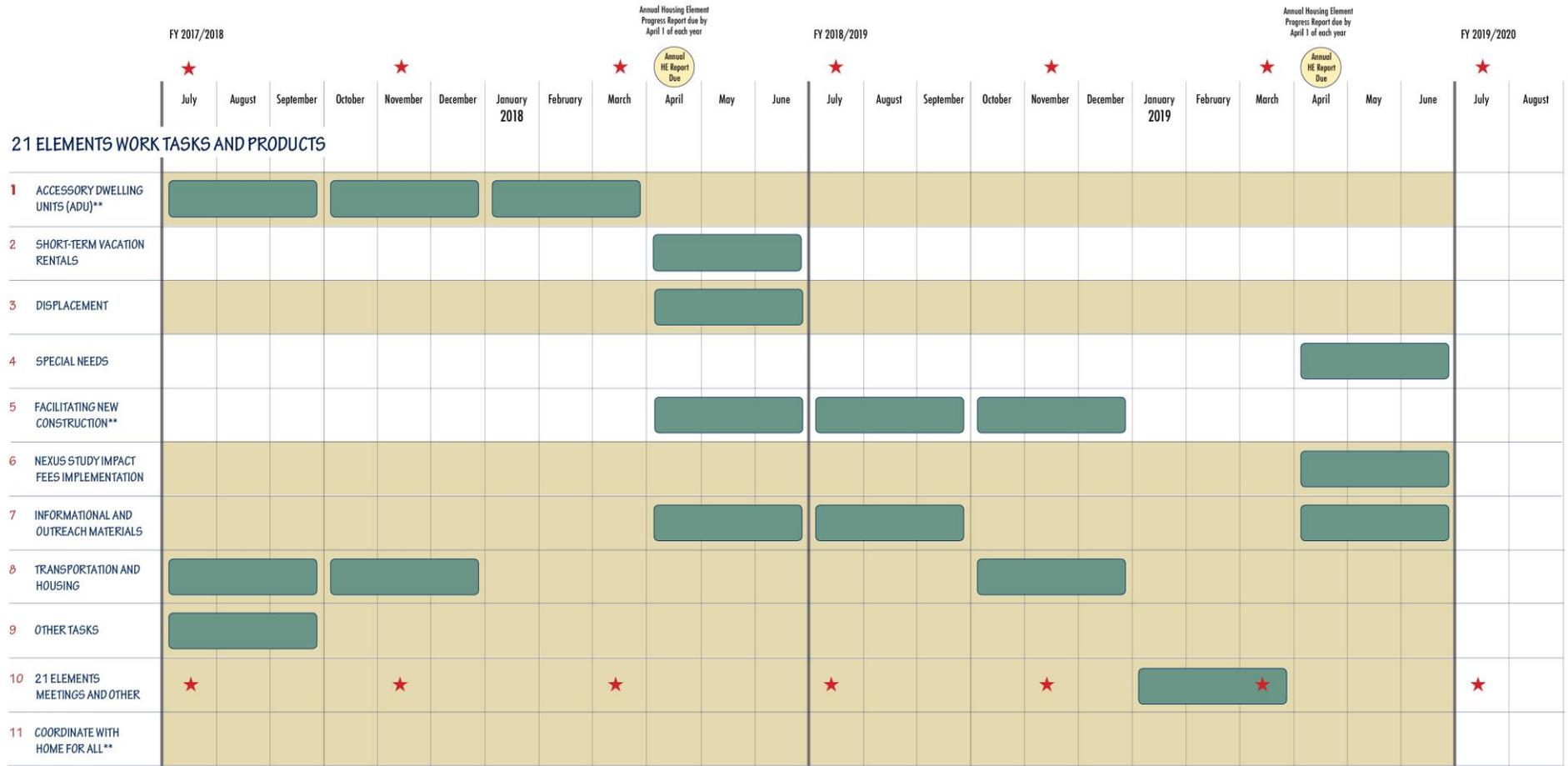


INFORMATIONAL/OUTREACH MATERIALS		
7.1	Produce County Trends Report	80 hours
7.2	Summarize Legislative Initiatives	40 hours
7.3	Conduct Business Community Outreach	40 hours
7.4	Support Decision Maker Events	40 hours
7.5	Support CD Directors Meetings	40 hours
7.6	Produce Handout on How Housing Fits	80 hours
7.7	Produce Handout on Affordable Housing	120 hours
		440 hours
TRANSPORTATION AND HOUSING		
8.1	Update Parking Policies Summary	40 hours
8.2	Assist with AHSC White Paper	40 hours
8.3	Host AHSC Lessons Learned Meeting	40 hours
8.4	Educate Planners about Transportation Issues	40 hours
8.5	Assist C/CAG with Additional Projects	80 hours
		240 hours
OTHER TASKS		
9.1	Support Automation of Reporting Requirements	80 hours
9.2	Host RHNA Sharing Follow up	80 hours
		160 hours
21 ELEMENTS WEBSITE, MEETINGS AND OTHER TASKS		
10.1	Facilitate 21 Elements Meetings	200 hours
10.2	Upgrade Website	120 hours
10.3	Conduct Organizational Development	80 hours
10.4	Respond to Other Requests	280 hours
		680 hours
COORDINATE WITH HOME FOR ALL		
11.1	Attend Home for All Meetings	40 hours
11.2	Assist with Other Home for All Tasks	280 hours
		320 hours
		4,040 total hours



21 Elements Work Schedule (2017-2019)

Prepared April 14, 2017



★ Tentative Technical Advisory Committee (TAC) Meetings

** Work on these tasks will begin before July 2017

Includes Ongoing Tasks

Completion of all products under this sub-task group (see timeline)