

City of Piedmont  
COUNCIL AGENDA REPORT

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DATE: August 17, 2020

TO: Mayor and Council

FROM: Sara Lillevand, City Administrator

SUBJECT: Consideration of a Contract with Lisa Wise Consulting to Develop SB 2 Housing Programs in an Amount Not to Exceed \$160,000

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RECOMMENDATION

1. Approve the attached agreement with Lisa Wise Consulting, Inc. (LWC) for consulting services and products relating to the preparation of housing programs consistent with the City of Piedmont's SB 2 Planning Grants Program grant.

EXECUTIVE SUMMARY

On September 16, 2019, the Council approved the City's application to participate in the SB 2 Program. The application included a scope of work which outlined the tasks and activities that the City wished to pursue in order to accelerate the production of housing in Piedmont. Grant recipients must complete new or modified policies and programs by the end of June 2022. The grant application's scope focused efforts on the two main strategies in the existing 2014 Piedmont Housing Element: the construction of accessory dwelling units (ADUs) on residential properties; and development of mixed-use multi-family development in zone D. The SB 2 grant application was accepted by State of California Department of Housing and Community Development (HCD), and HCD awarded the City \$160,000 in reimbursable funds to complete the project. City staff recommend that the City Council enter into an agreement with LWC to work with staff in preparing the housing program tasks and activities outlined in the City's grant application.

BACKGROUND

In 2018 and 2019, California Senate Bill 2 provided funding for housing through the SB 2 Planning Grant Program. Small jurisdictions such as Piedmont were eligible for planning grants from SB 2 funds in amounts up to \$160,000 in reimbursable funds for projects that streamline the development of new housing. The State distributed the grant funds to help jurisdictions finance the preparation, adoption or implementation of plans that facilitate housing approvals or accelerate housing production.

On May 22, 2020, City staff released a request for qualifications (RFQ) which outlined the tasks and activities required to develop the SB 2 housing programs, as well as comply with the state's SB 2

requirements. To garner the greatest levels of interest from professionals working in planning, as well as ensure transparency in the recruitment process, the City's RFQ was posted to the homepage of the City's website, emailed to a list of approximately 12 planning firms, emailed to the Piedmont Appreciating Diversity Committee, emailed to members of the press, and posted to the homepage of Planetizen.com, a top-ranked website with thousands of daily visitors and subscribers in the planning field. The RFQ was posted for approximately 1 month.

The City received statements of qualifications by the June 22, 2020 deadline from four planning firms. On July 17, 2020, an ad-hoc SB 2 Consultant Review Committee made up of Planning Commissioner Rani Batra, Public Works Director Chester Nakahara, Associate Planner Alan Carreon (City of Walnut Creek), Planning and Building Director Kevin Jackson, and Senior Planner Pierce Macdonald-Powell interviewed the four candidates.

The Review Committee deliberated after the interviews and unanimously recommended that three of the four candidates be invited to prepare more detailed project scopes and proposed budgets. A fourth candidate was deemed very qualified for certain financial aspects of the SB 2 project but not all of the required project tasks, such as architectural design and policy development.

The Review Committee also determined that, based on the high quality of each of the remaining three candidates' qualifications, no further Committee meetings were necessary. Accordingly, staff began reviewing project scopes and budgets in order to make a recommendation to the Council. The three SB 2 Program consultant candidates provided detailed project scopes and budgets to City staff on July 31, 2020.

There have been numerous changes to housing law since the development of the City's 2009 Housing Element. New government mandates to address the statewide housing crisis have created new opportunities and challenges for providing new housing in Piedmont. Staff believes that it is essential to utilize the services of a consulting firm that understands the new regulatory landscape and the range of possible local solutions. A consultant with experience working through these issues in other jurisdictions, particularly in Southern California, where the process of drafting housing element updates in compliance with the new state laws is already underway, will be an important resource to help the City find local solutions and meet the City's need for new housing.

## BUDGET

The City was awarded an SB 2 Program grant in the amount of \$160,000. The scope of work and budget in the grant application was reviewed by City staff; Placeworks, a planning firm that provides technical assistance for the SB 2 Program; and Barry Miller, the planning consultant that lead the last Housing Element Update and Piedmont Design Guidelines Update. The budget and scope of work were determined to be realistic and feasible.

The FY 2020/201budget adopted by the City Council incorporates the receipt of the \$160,000 of grant funds and the expected expenditure of those funds on this project in the Supplemental Planning Services item in the Planning and Building Department budget.

The total cost of the LWC contract is \$159,930 which includes all labor, travel, and project expenses related to the tasks and deliverables listed in tasks 1-5 of the scope of services in the attached agreement (Attachment A, pages 5-43). In addition to the SB 2 housing programs project, a Housing Element Update project is scheduled to begin next year in 2021 and conclude by 2023. The LWC project scope does not include amendments to the current Housing Element nor the extensive public outreach and public engagement planned for the next Housing Element Update project.

### SELECTION OF A CONSULTANT

City staff reviewed the project scopes and budgets provided by the three qualified SB 2 Program consultant candidates who participated in the interviews and provided proposals. As previously mentioned, City staff were impressed with the proposals of all three consultants. Staff selected LWC because of their experience with similar communities, including communities in Southern California, the references provided by staff of those communities, and their straightforward approach to the project including their step-by-step outline of project tasks and activities, their proposal cost, their commitment to project management and record-keeping, and their proposed public outreach. LWC's proposal includes four public stakeholder meetings while the other proposals included only one or two.

Staff notes the following exceptional components of the proposal submitted by LWC:

1. LWC will partner with Openscope Studios to complete architectural design standards for mixed-use and multi-family development and draft construction-ready architectural plans for accessory dwelling units (ADUs).
2. LWC will partner with Rincon Consulting to provide environmental planning services to advise City staff in the preparation of the documentation and disclosure required by the California Environmental Quality Act (CEQA).
3. LWC has completed dozens of housing element updates and is currently engaged to complete work for other local SB 2 projects for small cities in other parts of California.
4. LWC will provide public engagement for four stakeholder community events and two public hearings, more than any other candidate.
5. LWC is a local San Francisco-based, woman-owned and operated firm with over 30 years of experience in planning, housing law, and finance.
6. LWC is committed to helping the City develop policies to accelerate the production of housing, specifically affordable housing, for 50 multi-family apartments and 270 accessory dwelling units (320 affordable units total), consistent with the City's Housing Element.

LWC has prepared a summary work plan detailing the process of public engagement to assist with the development of the housing programs. The day-to-day management of the SB 2 Program project will be managed by Monica Szydluk, a Senior Associate with LWC with 16 years of experience. The proposal indicates a clear understanding of Piedmont's unusual challenges, such as its small size, mostly single-family zoning, and limited available land. Overall, this process is estimated to take one

year to complete the full preparation of design guidelines and amendments and approval by the Council. Periodic updates to the Council will be planned during this process in order to facilitate a fully transparent process and seek, if needed additional guidance from the Council. Ms. Wise and Ms. Szydlik are expected to be present for the August 17, 2020 City Council meeting to answer questions.

### CONCLUSION

City staff recommends approval of the attached agreement with LWC to provide technical services and work products staff believes will be necessary to develop housing programs consistent with the current Piedmont Housing Element, as well as to anticipate and prepare for the new requirements and regulations for the City's next Housing Element Update.

By: Kevin Jackson, Director of Planning and Building Department  
Pierce Macdonald-Powell, Senior Planner

### ATTACHMENTS

<u>Attachment</u>	<u>Pages</u>	
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A	Pages 5-42	Agreement with Lisa Wise Consulting for services related to the development of housing policies and programs pursuant to the SB 2 Housing Grants Program grant.
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## CONTRACT

This Contract made August 17, 2020 ("Effective Date"), between the City of Piedmont, California, a municipal corporation, 120 Vista Avenue, Piedmont, California, 94611, ("City") and Lisa Wise Consulting, a private corporation, ("Independent Contractor").

1. City is a municipal corporation which needs certain services, products, and software as more specifically set forth hereafter.
2. Independent Contractor agrees to provide these services, products, and software to the City under the terms and conditions set forth in this Contract ("Contract").

3. Services

Independent Contractor shall provide the services as set forth in Exhibit A attached hereto and incorporated herein.

4. Compensation

- a. City will pay the Independent Contractor the lump sum of: **\$159,930** dollars for the services described in Section 3 above. City shall issue payment within 30 days of the satisfactory completion of the services and products, described in Section 3 above, in accordance with the project schedule described on page 13 of Exhibit A.

5. Term

This contract shall begin on the Effective Date. Unless otherwise terminated as provided in this Contract, this Contract shall terminate 2 years from the Effective Date.

6. Contractual Relationship

The parties intend that an independent contractor-employer relationship will be created by this Contract. City is interested only in the results to be achieved, and the conduct and control of the work will lie solely with Independent Contractor. Independent Contractor is not to be considered an agent or employee of City for any purpose, and neither Independent Contractor nor any employees of Independent Contractor are entitled to any of the benefits that City provides for City's employees. It is understood that City does not agree to use Independent Contractor exclusively. It is further understood that Independent Contractor is free to contract for similar services to be performed for other cities, persons or entities during the term of the Contract. Independent Contractor shall be fully responsible for all income, social security or other taxes or deductions, including but not limited to worker's compensation and unemployment deductions, relating to the services it performs for City.

7. Indemnity and Hold Harmless

To the fullest extent permitted by law, Independent Contractor shall defend (with legal

counsel reasonably acceptable to City), indemnify and hold harmless City and its officers, elected officials, employees, agents, and volunteers (collectively “Indemnitees”) from and against any and all liability, claims, loss, cost, damage, injury (including, without limitation, injury to or death of an employee of Independent Contractor or its subconsultants), expense and liability of every kind, nature and description (including, without limitation, fines, penalties, incidental and consequential damages, reasonable court costs and attorney’s fees, litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith, and costs of investigation) (“Liability”), where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Contract by Independent Contractor or by any individual or entity for whom Independent Contractor is legally liable, including but not limited to, officers, agents, employees, subcontractors or consultants of Independent Contractor.

For design professionals (as that term is defined by Civil Code § 2782.8) acting within the scope of their professional capacity, to the fullest extent permitted by law, Consultant shall, at its own expense, indemnify, protect, defend (by counsel reasonably satisfactory to the City) and hold harmless any Indemnitees from and against any and all Liability, whether actual, alleged or threatened, which arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant, or as may be provided by statute in Civil Code § 2782.8, as may be amended from time to time.

Neither termination of this Contract nor completion of the services shall release Independent Contractor from its obligations under this Section 7, as long as the event giving rise to the claim, loss, cost, damage, injury, expense or liability occurred prior to the effective date of any such termination or completion, and this section shall survive the termination of the Contract.

## 8. Insurance

The following minimum levels of insurance coverage shall be provided during the term of this Contract. Prior to the execution of the Contract, Independent Contractor shall provide proof of insurance required. Insurance is to be placed with insurers authorized to conduct business in the state with a current A.M. Best’s rating of no less than A:VII, unless otherwise acceptable to the City.

Independent Contractor shall furnish the City with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Independent Contractor’s obligation to provide them. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

Coverage shall be at least as broad as:

1. Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an “occurrence” basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$2,000,000 per occurrence. If a general aggregate limit applies,

either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 05 09 or 25 04 05 09) or the general aggregate limit shall be twice the required occurrence limit.

2. Automobile Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, covering hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

3. Workers' Compensation: as required by the State of California, with Statutory Limits.

4. Professional Liability (Errors & Omissions): As appropriate to Independent Contractor's services, and not less than \$2,000,000 per occurrence.

The insurance policies are to contain, or be endorsed to contain, the following provisions:

The City of Piedmont, its Council Members, directors, officers, agents and employees shall be named as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Independent Contractor including materials, parts or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Independent Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 forms if later revisions used).

For any claims related to this contract, Independent Contractor's insurance coverage shall be primary insurance coverage (at least as broad as ISO CG 20 01 04 13) with respect to the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City, its officers, officials, employees, or volunteers shall be excess of the Independent Contractor's insurance and shall not contribute with it.

Independent Contractor hereby grants to City a waiver of any right to subrogation which any insurer of said Independent Contractor may acquire against the City by virtue of the payment of any loss under such insurance. Independent Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

Independent Contractor shall require the insurer to provide City with 30-day prior notice of termination or material change in coverage and ten (10) days prior notice of cancellation for non-payment.

9. Assignability

Independent Contractor shall not assign, delegate, or transfer any interest in this agreement nor the performance of any Independent Contractor's obligations hereunder, without the prior written consent of the City.

10. Miscellaneous

As used in this Contract, the masculine, feminine or neuter gender, and the singular or

plural number, shall each be deemed to include the others whenever the context so indicates.

11. Notices

Any notices to be sent pursuant to this Contract shall be given in writing, via facsimile and concurrently by prepaid U.S. certified or registered postage addressed to City at 120 Vista Avenue, Piedmont, California 94611, and to Independent Contractor at Lisa Wise Consulting, Inc., 601 California St Suite 607, San Francisco, CA 94109, or at such other address as each party shall give the other in writing from time to time, and notices shall be deemed received at the time of personal delivery or three (3) working days after being placed in the United States Mail, postage prepaid, certified mail, return receipt requested.

12. Governing Law

This Contract shall be governed by the laws of the State of California. Jurisdiction and venue of litigation arising from this Agreement shall be in the County of Alameda, State of California.

13. Modification

Any modification of this Contract will be effective only if it is in writing signed by all parties to this Contract.

14. Time is of the Essence

Time is of the essence in the performance of this Contract.

15. Termination

The following provisions shall govern termination under this Contract:

- a. Either party may terminate this Contract for cause as follows:
  - (1) The party electing to terminate shall give the other party written notice of termination at least five (5) days prior to the termination date, setting forth very specifically the grounds for termination, the specific provisions of the Contract that has been violated, and a full statement of the facts surrounding the violations(s).
  - (2) If the terminated party so elects, the parties shall meet promptly and make good faith efforts to resolve the violation(s) in a mutually agreeable way.
  - (3) If any such violation cannot be resolved by the parties at such meeting, or at any mutually agreed extension(s) of such meeting, the termination shall proceed.
  - (4) If the violation(s) have not been resolved, the terminating party may proceed with termination, and with retaining other person(s) or entities to provide services, if the terminating party is the City.
- b. Either party may terminate the Contract at any time without cause upon at least sixty (60) days prior written notice to the other party. In the event of any such



termination by City, Independent Contractor shall be paid for services actually performed through the date of termination, and Independent Contractor's work shall be immediately discontinued as of that date, except that City may elect, at City's option, to have Independent Contractor complete one or more projects or specific activities which are then in progress, in which case Independent Contractor shall be paid for such services until completion. If terminated by Independent Contractor, any assignment accepted by Independent Contractor prior to the notice of termination shall be completed if desired by City.

16. Equal Opportunity

Independent Contractor shall insure that its policies and practices provide equal opportunity to all applicants and employees without regard to race, color, creed, gender, age, religion, national origin, sexual preference, gender identity, marital status, disability, Acquired Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC) and in addition, Independent Contractor must comply with the Americans with Disabilities Act.

17. Compliance with Laws

Independent Contractor shall use the standard of care in its profession to comply with all applicable federal, state, and local laws, codes, ordinances, and regulations. Independent Contractor represents and warrants to City that it has and shall, at its sole cost and expense, keep in effect or obtain at all times during the term of this Contract any licenses, permits, insurance and approvals which are legally required for Independent Contractor to practice its profession.

18. Entire Agreement

This Contract constitutes the entire agreement of the parties with respect to the matters set forth herein. Any amendments, modifications, or changes to this Agreement shall be in writing and signed by both parties. In the event of a conflict between the terms set forth in this Contract and the terms set forth in any exhibit to this Contract, the terms of this Contract shall govern over the terms of any exhibit.

19. Ownership of Documents

All plans, studies, documents and other writings, including working notes and internal documents, prepared by and for Independent Contractor, its officers, employees and agents and subcontractors in the course of implementing this Agreement, shall become the property of the City upon payment to Independent Contractor for such work, and the City shall have the sole right to use such materials in its discretion without further compensation to Independent Contractor or to any other party. Independent Contractor shall, at Independent Contractor's expense, provide such reports, plans, studies, documents and other writings to City upon written request. All documents prepared by Independent Contractor are confidential and shall be maintained to preserve their confidential nature. Release of any such documents to third parties shall only be made upon written consent of City.

20. Licenses

Independent Contractor represents and warrants that it has all licenses, permits, qualifications, insurance and approvals of whatsoever nature which are legally required of Independent Contractor to practice its profession. Independent Contractor represents and warrants to City that Independent Contractor shall, at its sole cost and expense, keep in effect or obtain at all times during the term of this Agreement, any licenses, permits, insurance and approvals which are legally required of Independent Contractor to practice its profession.

21. Waiver

Waiver of a breach or default under this Agreement shall not constitute a continuing waiver of a subsequent breach of the same or any other provision under this Agreement.

IN WITNESS WHEREOF, the parties have executed this Contract at Piedmont, California, the day and year first above written.

CITY OF PIEDMONT:

Lisa Wise, LWC:

By: \_\_\_\_\_  
Mayor Robert McBain

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

Attest:

\_\_\_\_\_  
John O. Tulloch, City Clerk

Approved as to form and legality:

\_\_\_\_\_  
Michelle Marchetta Kenyon, City Attorney  
Deepa Sharma, Assistant City Attorney



CITY OF PIEDMONT, CA  
**SB 2 Planning Grant  
Mixed-Use and Multi-Family  
Objective Design Standards and  
Prototype Plans and Incentives  
for Accessory Dwelling Units**

**PROJECT PROPOSAL**  
UPDATED AUGUST 10, 2020

**Prepared for:**



**City of Piedmont**

**Planning & Building Department**

120 Vista Ave  
Piedmont, CA 94611

**Prepared by:**



**Lisa Wise Consulting, Inc.**

870 Market Street, Suite 977  
San Francisco, CA 94102  
[www.lisawiseconsulting.com](http://www.lisawiseconsulting.com)  
(805) 595-1345

**With Subconsultants:**



**OpenScope Studio**

1776 18th Street  
San Francisco, CA 94107  
(415) 891-0954



**Rincon Consultants, Inc**

449 15th Street #303  
Oakland, CA 94612  
(510) 834-4455



August 10, 2020

Kevin Jackson, AICP, Director  
Pierce MacDonald-Powell, Senior Planner  
Planning and Building Department  
120 Vista Avenue  
Piedmont, CA 94611

RE: SB 2 Planning Grant Mixed-Use and Multi-Family Objective Design Standards & Prototype Plans and Incentives for Accessory Dwelling Units (Project)

Dear Kevin and Pierce:

Lisa Wise Consulting, Inc. (LWC) and our team of OpenScope Architecture and Rincon Consultants are pleased to submit our proposal to the City of Piedmont for Mixed-Use and Multi-Family Objective Design Standards and Prototype Plans and Incentives for Accessory Dwelling Units.

Our firms specialize in zoning codes, designing and building ADUs, meaningful public participation, and creating objective design and development standards that address how multifamily and mixed-use development is regulated, as well as how to modernize and streamline the review and entitlement process. We recognize the challenging current legal context in which the City is aiming to develop local solutions to housing issues, and we bring an understanding of SB 35, SB 330, AB 1485, SB 13, AB 68, AB 881, AB 670, AB 671 and AB 686.

LWC is uniquely suited for this project having successfully completed over 60 zoning code updates, 20 HCD-approved Housing Element updates, and objective design and development standards for mixed-use and multifamily districts in 12 California cities. With a staff of 19, we are capable of managing large code update engagements in cities such as Las Vegas, NV, and Long Beach, CA, but sufficiently nimble to give each of our clients very personal attention. LWC prioritizes open communication and transparency in the planning process and, in doing so, has developed a track record of client trust and ongoing working relationships.

Additionally, OpenScope Studio are experts in preparing ADU design and construction documents and in creating ADU planning documents as is evidenced in their work in the City of San Francisco and the County of San Mateo. OpenScope Studio's ADU handbook for the City of San Francisco has been an inspiration to municipalities and individuals around the country on how to add units to existing urban housing stock.

As a team, we bring our collective skills and collaborative experience to Piedmont:



As experts in Zoning code assessments and updates, LWC will lead the project out of its San Francisco office. LWC will assume responsibility for communication with the City and among the consultant team as well as meeting all timeline and budget obligations. LWC will also lead the production of draft and final documents, memos, and public presentations.



OpenScope is a San Francisco architectural practice committed to informed design across aesthetic, social, technical, and economic contexts with expertise and experience in ADU regulation, design, and construction documents in the Bay Area. OpenScope is known for writing the ADU handbook for the San Francisco Planning Department (written in 2014 and updated in 2018 to reflect legislative changes).



Rincon Consultants are environmental consultants based in Oakland with over 25 years' experience addressing CEQA requirements from MNDs to full programmatic EIRs and public comment.

Our commitment, experience, and specialized knowledge will assure thorough research and technical analysis, substantive community engagement, effective collaboration with City staff, and ultimately clear, concise objective standards that will stand the test of time. As the CEO and founder of LWC, I will work closely with Monica Szydlik, Senior Associate in-charge of the San Francisco office and assume ultimately responsible for the quality, timeliness, and adherence to budget for all aspects of the project. We appreciate the opportunity to participate in the bidding process and look forward to working with you.

Sincerely,

A handwritten signature in blue ink that reads "Lisa A. Wise".

Lisa Wise, AICP, CPA (inactive)  
President, CEO  
Lisa Wise Consulting, Inc.  
[lisa@lisawiseconsulting.com](mailto:lisa@lisawiseconsulting.com)  
805.595.1345

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## A. Introduction: Project Approach and Methodology

Home to over 10,000 residents, the City of Piedmont is known for its beautiful neighborhoods, generous park space and small-town charm. Almost 70 percent of Piedmont is designated for single-family residential; about 0.3 percent is designated for multi-family residential; and vacant land accounts for less than 2 percent of the city.

As established in the 2009 General Plan, one of the City's Guiding Principles to guide growth and development is to *Develop Local Solutions to Regional Housing and Transportation Issues*. With its unique urban form, local solutions and strategies will indeed be needed to comply with State requirements and to ensure community support in achieving regional and citywide housing goals.

The consulting team, lead by LWC, will work closely with staff and the community to introduce high-quality multi-family building types and ADU designs for Piedmont's physical and aesthetic contexts; re-work the Zoning map and code to support the development of the designs; ensure compliance with recent legislation; and prepare required CEQA documents.

### LEGAL CONTEXT

The team will advise on the implications of key pieces of legislation, including:

**SB 35** - *expedites and facilitates the construction of affordable units*

**SB 330, AB 1485** - *limit a city's ability to down-zone and prohibits non-objective standards for housing projects*

**SB 13, AB 68, AB 881** - *allow ADUs in multi-family zones, reduce standards for ADUs (lot coverage, lot size, setbacks, parking), limits fees*

**AB 670, AB 671** - *limits restrictions on and incentivizes ADUs and Junior ADUs*

**AB 686** - *requires city to affirmatively further the goals of fair housing in the community*

### METHODOLOGY

**The team will develop a robust community engagement program.** Working with the community to understand issues surrounding housing and design, the team will develop a community engagement program that includes community-wide outreach focused on key topics; a visual and interactive on-line community-wide survey; and meetings with City decision-makers. The outreach program will be reflective of the operating environment during the COVID-19 public health emergency, as required.

**The team will develop objective design standards that lead to development that the community supports.** Objective standards will be informed by a survey of the City and its opportunity sites; testing of existing physical development standards on key opportunity sites; a review of existing subjective standards and guidance; an analysis of multi-family building types; and design preferences expressed by the community.

**The team will develop high-quality context-sensitive ADU designs.** Drawing on community input on local character, our survey of sites, and our knowledge of construction and best practices, our team will prepare drawings for three different ADU designs.

**The team will work with the City to meet its requirements under AB 686.** The revised housing statute requires that all California communities take meaningful actions to overcome existing patterns of segregation and foster inclusive communities. The team will investigate impediments in the City's land use policies that inhibit the ability to achieve fair housing

goals and objectives, including an evaluation of the current land use and development patterns and tools to mitigate obstacles. These recommendations are likely to include a mix of policy, programmatic (funds, impact fees, credits, etc.), zoning, and procedural changes.

**The team will advise on the required level of CEQA documentation.** The team will provide advisory and technical support on the CEQA process and procedures. This assistance may include preliminary screening of environmental constraints on potential housing sites to help inform the CEQA approach for the project and future housing element update.

## B. Personnel, Equipment and Facilities

**Lisa Wise Consulting** is an urban planning firm dedicated to creating zoning ordinances and development codes that enable pedestrian and transit-oriented neighborhoods, revitalize built environments, and facilitate sustainable, well-designed communities. LWC is currently engaged in 12 objective design and development standard projects and has completed 60 comprehensive zoning code updates; and over 130 long range planning, housing, and economic projects on time, on budget and to our client's satisfaction.

**Lisa Wise, AICP, CPA (inactive), President** has over 30 years of experience in zoning codes, housing policy, economic development strategies, financial analysis and managing complex engagements. Lisa has been directly responsible for over 34 code updates, 35 economic projects, 23 master and specific plans, and 20 housing policy engagements. Lisa will be ultimately responsible for the firm's adherence to scope, budget, timeline, and tenets of the contract. Lisa will work closely with Monica and David to guide the approach and review final deliverables.

**David Bergman, Director**, with over 25 years of experience, has focused on community development, real estate and urban planning projects, with an emphasis on feasibility and implementation. As the former Director of Planning for the City of South Pasadena, he oversaw the approval of the City's first density bonus application and Accessory Dwelling Unit (ADU) Ordinance, approved by the HCD. David will serve as Project Director, working closely with Monica Szydlik (Project Manager) and Spencer Johnson (Lead Associate).

**OpenScope Studio** is a full-service San Francisco-based architecture firm and a national leader in promoting ADUs as a "missing middle" and infill housing strategy. OpenScope Studio's experience extends to ADU policy research, pre-approved ADU plans, and design of new mixed-use development, co-housing, transitional/assisted living, senior housing, and over 150 ADUs.

**Monica Szydlik, AICP, Project Manager** has over sixteen years of experience leading specific plans, transit-oriented development plans, streetscape design, design guidelines, development regulations and zoning codes. Her strengths are management of multi-disciplinary teams, community outreach strategies, and coordination of presentations and deliverables. As Project Manager, Monica will be responsible for day-to-day communication with the City and sub-consultant teams. She will work closely with Lisa, David and Spencer to draft, review and edit deliverables and ensure they are complete, correct, submitted on time, and within budget.

**Spencer Johnson, CNU-A, Lead Associate** brings 5 years of hands-on experience in long-range planning, urban and graphic design, hybrid and form-based codes, and land use economics. He has facilitated formal code training, conducted conditions research, developed draft codes frameworks and code chapters and managed large complicated documents and databases. As the Lead Associate, Spencer will work closely with Monica to compile data, create and edit draft reports and memos and develop graphics.

**Mark Hogan, AIA, LEED BC+D, NCARB, Principal** is a licensed architect in New York, California and Montana with a focus in housing and sustainable urban design. Prior to joining OpenScope, he was an Associate at David Baker Architects where he worked on large market rate and affordable infill housing projects throughout the San Francisco region.

**Ian Dunn, AIA, LEED AP, Principal** has over 20 years of experience designing urban infill developments and award winning civic buildings, education facilities, single-family residences, and multifamily housing. He was

formerly a Senior Associate at David Baker Architects. Ian will be directly involved in the design and research required for the mixed-use and ADU portions of the project.

**Mary Davis, AIA, Associate** comes with a background in architecture, landscape architecture and urban design. She has experience in both large planning, tenant improvement and multi-family residential projects. She is currently working on projects with the San Francisco ADU program. She will manage day-to-day production of the ADU designs and regulatory research tasks, and will support LWC with outreach and presentations.

**Rincon Consultants, Inc.** is a multi-disciplinary environmental science, planning, and engineering consulting firm that provides quality professional services to government and industry. CEQA is a core business area for Rincon and our firm has provided environmental consulting services for large programmatic efforts such as general plans, housing elements, zoning programs and community and specific plans for over 25 years.

**Abe Leider, AICP CEP, Principal**, has over 20 years of experience in long-range planning, development review, and environmental impact analyses for infrastructure and development projects under CEQA. He has managed the preparation of MNDs and Environmental Impact Reports (EIRs) for institutional, residential, commercial, and industrial projects throughout California.

general plans, specific plans, and zoning ordinance updates.

**Kari Zajac, MESM, Air Quality and Noise Technical Lead** has over five years of experience in the environmental field. Ms. Zajac's work involves technical analysis for air quality, greenhouse gas, and noise assessments.

**Lucy Sundelson, Lead Analyst** specializes in CEQA project management and analysis and in contract planning services, including projects with extensive community involvement, technical resource analyses, and multiple public meetings.

## C. Qualifications and References

### Lisa Wise Consulting

#### CITY OF LOS ALTOS - OBJECTIVE DESIGN STANDARDS

LWC was retained by the City of Los Altos to prepare objective design standards for multi-family and residential mixed-use development. LWC started with an assessment of existing code and regulations, micro-analysis, and site testing and robust a public outreach program. The updated standards are clear, consistent, leverage current market conditions, are legally compliant, and reflect the community's vision of modern village character. Please see [link](#) for project portfolio.

#### CLIENT:

City of Los Altos  
Guido F. Persicone  
Planning Services Manager  
(650) 947-2633

#### BUDGET:

\$299,750

#### TIMEFRAME:

May 2020 - Present

**CITY OF MORGAN HILL - MONTEREY CORRIDOR FORM-BASED CODE**

LWC was hired by the City of Morgan Hill to develop a form-based code (FBC) along the Monterey Road Corridor which is envisioned as a mixed-use, walkable place with a range of housing types. LWC initiated the project with a General Plan and Zoning Code evaluation and Impediments and Recommendations Memo to highlight policy direction for objective housing standards and an FBC approach. The final FBC aims to streamline housing development and improve built form and walkability along the Corridor. Please see [link](#) for project portfolio.

**CLIENT:**

City of Morgan Hill  
Leslie Little  
Assistant City Manager  
for Community Dept  
(408) 776-7384

**BUDGET:**

\$170,720

**TIMEFRAME:**

April 2020 - Present

**CITY OF ST. HELENA - ZONING CODE UPDATE**

The City of St. Helena hired Lisa Wise Consulting, Inc. to update its Zoning Code and satisfy the City's commitment to an open, transparent, and collaborative process. LWC developed a public outreach program with stakeholder interviews; community workshops; and Planning Commission and City Council Study Sessions. The new code features objective standards aimed at context-sensitive and visually appealing development; that protects the small-town, rural character; and complies with State and Federal law. Please see [link](#) for project portfolio.

**CLIENT:**

City of St. Helena  
Maya DeRosa  
Planning & Building  
Director  
(707) 967-2783

**BUDGET:**

\$319,990

**TIMEFRAME:**

August 2019 - Present

**OpenScope****COUNTY OF SAN MATEO - HEART ADU'S**

OpenScope is developing a series of four ADU plans with options for contextually appropriate exterior elevations for a nonprofit that is working with jurisdictions in San Mateo County. The first phase of the project included community outreach, and the second phase (which is ongoing) will result in permit-ready sets of building plans that will be distributed to the public. Please see [link](#) for project portfolio.

**CLIENT:**

County of San Mateo  
Boris Vatkin  
Management Analyst  
(650) 204-5639

**BUDGET:**

\$100,000

**TIMEFRAME:**

2019-Present

**Rincon****CITY OF BERKELEY - SOUTHSIDE ZONING ORDINANCE AMENDMENTS PROJECT EIR**

The proposed zoning modifications are intended to increase housing capacity and production through changes in a targeted number of zoning parameters: building heights, and footprints, parking, ground-floor residential, and adjustments to the existing zoning district boundaries. Key issues in the EIR include cultural and historic resources, air quality, energy, GHG emissions, land use and planning, transportation, and utilities. See [link](#) for project portfolio.

**CLIENT:**

City of Berkeley  
Elizabeth Greene  
Senior Planner  
(510) 981-7484

**BUDGET:**

\$192,000

**TIMEFRAME:**

2019 - Present

**D. Statements**

**Conflict of Interest:** As LWC's President and CEO, I attest that the firm will have no real or perceived conflicts of interest providing urban planning services to the City of Piedmont.

**Contract:** LWC is able to comply with the tenets in the City of Piedmont Standard Consulting Services Agreement as presented and attached to the May 22, Request for Qualifications.

## E. Scope of Work

### Task 1: Project Initiation, Project Management, and Data Collection

- A. Project Initiation Meeting (Team).** The consulting team will prepare for and attend a project initiation meeting with City staff (teleconference) to review the project scope of work and timeline; confirm project goals and objectives; and establish a communication protocol with the team. At this meeting, the team will work with City staff to determine the objectives and timing of the outreach events. The consulting team considers it essential that the process is structured such that City Council, the Planning Commission, and community members can review and comment on project deliverables as they are being formulated.

At the project initiation meeting, the team will also discuss pertinent reports and studies, including the General Plan and Zoning Code, the General Plan MND, the Housing Element Neg Dec, the City's multi-family design guidelines, the City's design review criteria for various project types, recent State legislation as it relates to the project, and other relevant information. The consulting team will submit a formal document request to City staff following the project initiation meeting.

- B. Project Management (LWC).** The consulting team will establish project management protocols to be maintained for the duration of the project. LWC's methodology for scheduling, coordination, management of project costs and QA/QC includes 1) working very closely with City staff to assure a shared understanding and expectation on all aspects of the scope, timeline, budget, milestones, communication, shared cloud-based project folders, and review and approval protocols, 2) regularly scheduled internal (consulting team) and external (with City staff) meetings to discuss progress and strategies to address potential efficiencies and obstacles before they arise, and 3) the on-line time management platform Big-Time, which LWC uses to track, archive, review, assess and report on projects by hour, by employee, task and subtask. Our methodology also assures that no draft deliverables will be submitted until they have been completely vetted by our team.

The team anticipates standing check-in video conferences with Piedmont staff, either weekly or biweekly as determined by the team, as well as additional calls and meetings as needed to engage in thorough review of all interim deliverables. The consulting team will not prepare staff reports; however, all interim deliverables will include explanatory text that can be included in staff reports as a way of "showing the work." The protocols and ongoing project management efforts will ensure that the team meets all grant application requirements and milestones, meets all State HCD requirements, exceeds the City's expectations, and successfully "closes out" the project.

- C. Document Review and Data Collection (LWC and OpenScope).** The consulting team will conduct a thorough background assessment relevant to multi-family development, residential mixed-use development, and ADU design to inform the project. This task will include:
- An evaluation the Piedmont Zoning Code for consistency with recent State law, including but not limited to SB13, SB35, SB330, AB1485 and AB881;

- A review of relevant subjective and objective standards, criteria, and guidelines for multi-family, residential mixed-use development, and ADUs for consistency with local best practices; and
- An analysis of existing characteristics of the City's built environment to identify exemplars and unique attributes.

#### TASK 1 MEETINGS:

- » [Project Initiation Meeting](#)

## Task 2: Public Outreach

- A. Community Outreach Event #1: Guiding Principles (LWC).** At an initial stakeholder event, the consulting team will introduce the project to the community, identify project objectives, and engage the community in a discussion of opportunity sites and strategies for inclusivity and fair housing. This event will serve as the “kick-off” for the Piedmont community’s introduction to AB686 and discussion of strategies the City may use to proactively stimulate economic and racial inclusion. The event will include a high-level overview of the types of affordable housing programs that could be employed in Piedmont based on findings in the 2020 County of Alameda Regional Analysis of Impediments to Fair Housing Choice. The objective of this event will be to establish community-supported guiding principles for furthering fair housing in Piedmont.

The event will be designed as an interactive community-wide meeting/study session with charrette-style activities and ample opportunities for public testimony and questions. The consulting team will design, lead and facilitate the event with facilitation assistance from City staff. The event is anticipated to be a maximum of 1.5 hours and may take the form of a presentation to an advisory committee appointed by the City Council. The format of the event will depend on COVID 19 precautions. Following the event, the consulting team will prepare a summary of feedback received in a Guiding Principles Memo.

- B. Community Outreach Event #2: Objective Development and Design Standards (LWC).** Prior to drafting the objective development and design standards, the consulting team will lead an outreach event to engage the community in a discussion about objective standards and gather input on the design of multi-family and residential mixed-use development. At the event, the team will provide an overview of the project objectives and guiding principles, review existing objective and subjective standards, and hear the community’s priorities for multi-family and residential mixed-use design in Piedmont. Topics of discussion may include but will not be limited to: building placement, building orientation and access, overall building envelope, building-to-street relationship, roof design, parking design, façade articulation, architectural style and detail, building materials and color, appropriate mix of uses, and performance standards. The team will also introduce the financial feasibility studies and seek community input on its development.

The event will be designed as an interactive community-wide meeting/study session with charrette-style activities and ample opportunities for public testimony

and questions. The consulting team will design, lead and facilitate the event with facilitation assistance from City staff. The event is anticipated to be a maximum of 1.5 hours and may take the form of a presentation to an advisory committee appointed by the City Council. The format of the event will depend on COVID 19 precautions.

- C. Community Outreach Event #3: ADU Design (OpenScope and LWC).** Prior to preparing the ADU prototype drawings and recommendations for the ADU Ordinance, OpenScope Studio will lead an outreach event to engage the community in a discussion about ADU design and gather input on the community's priorities. At the event, the team will provide an overview of the project objectives and guiding principles, review existing ADU standards, and hear the community's priorities for the design of ADUs.

The event will be designed as an interactive community-wide meeting/study session with charrette-style activities and ample opportunities for public testimony and questions. The consulting team will design, lead and facilitate the event with facilitation assistance from City staff. The event is anticipated to be a maximum of 1.5 hours and may take the form of a presentation to an advisory committee appointed by the City Council. The format of the event will depend on COVID 19 precautions.

- D. ADU Community Survey (OpenScope and LWC).** The consulting team will prepare a robust community-wide survey to gather the following:

- Community priorities for ADU design. Topics may include architectural style, size, visibility, privacy, design compatibility with primary structure and neighborhood, etc.
- Community sentiment on ADUs. Topics may include perceived barriers to construction (spatial, regulatory/permitting, conflict with neighbors, etc.), views on new legislation (perceptions of/concerns about), use of ADU (short-term rentals, etc.).
- Data on the city's existing ADUs (including rents, demographics, condition, tenure of occupant(s), etc.).

The ADU Community survey will be distributed community-wide and will be conducted on-line. The ADU Community Survey is intended to be rolled out concurrently with community event #3. Following the closing of the survey, the team will document the survey results.

- E. Community Outreach Event #4: Public Review Drafts (OpenScope and LWC).** Following the preparation public review drafts, the consulting team will hold a community event at which the community will be invited to comment on all the project's public review drafts. These will include:

- Public Review Draft Strategies to Affirmatively Further Fair Housing and Available Land Inventory (see Task 3B)
- Public Review Draft Objective Development and Design Standards (see Task 3C)

- Public Review Draft Amendments to ADU Ordinance and ADU Incentives (see Task 3D)
- Public Review Draft ADU and JADU plans and elevations (see Task 4C)

The event will be designed as an interactive community-wide meeting/study session with charrette-style activities and ample opportunities for public testimony and questions. The consulting team will design, lead and facilitate the event with facilitation assistance from City staff. The event is anticipated to be a maximum 1.5 hours and may take the form of a presentation to an advisory committee appointed by the City Council. The format of the event will depend on COVID 19 precautions.

#### TASK 2 MEETINGS:

- » Community Event #1: Guiding Principles
- » Community Event #2: Objective Design Standards
- » Community Event #3: ADU Design
- » Community Event #4: Public Review Drafts

#### TASK 2 DELIVERABLES:

- » Guiding Principles Memo
- » ADU Community Survey

## Task 3: Analysis and Recommendations

- A. Economic Feasibility Studies (LWC).** LWC will prepare a financial feasibility analysis for two potential development sites in Piedmont. This will include an analysis of one multifamily residential project tested for a site in the C zone and one mixed use residential/retail commercial project tested for a site in the D zone. As the economic feasibility study will be conducted concurrent with outreach about and analysis of development standards, the consulting team will develop basic 3D models for each typology to demonstrate developability given the evolving zoning standards for overall building envelope and placement. The same 3D models will then be used as a base on which to work out objective design standards (see Task 3C). The formulation of potential building envelopes and development standards will reflect economic feasibility criteria as the design and feasibility tasks will be prepared concurrently.

The economic feasibility study will evaluate the two sites consistent with the requirements of AB 1397 and the requirement to affirmatively further fair housing. Each project will be analyzed under the following scenarios:

- Existing market conditions (such as land cost, development costs and achievable rents) and current entitlements;
- As an as of right SB 1818 density bonus project; and
- As a project that would qualify for streamlining under SB 35.

This task will be undertaken via the preparation of a financial feasibility model sometimes called a pro forma or development pro forma. A development proforma forecasts the likely return on investment that a development would produce after it is constructed and leased out. In this case LWC will prepare a pro forma that examines the three scenarios listed above via the following variables:



*Cost of Land.* Because of the limited inventory of land available for sale and recent sales activity in Piedmont, land values will have to be estimated rather than sourced from records of recent sales. The method for determining these costs is referred to as a residual land value analysis. This approach assesses the potential revenues that could be generated by a project and subtracts the costs of development to determine the remainder, or residual. This value represents the maximum that a project could afford to pay for land and still remain profitable. This approach is a common and accepted method of determining land value when few sales comparables exist.

*Capital Costs.* This includes the hard costs of construction for a project along with soft costs such as services, planning permits and fees. This would include any impact fees or assessment that the city would impose on a new project in Piedmont

*Revenues.* This includes estimates, based on a review of current prices in neighboring or comparable communities, of rents for both residential or in the case of a mixed use project commercial uses. This market research would be supported through contacts with and discussions with local developers and stakeholders as directed by the city. Operations costs would be subtracted to produce an estimate of net operating income.

*Return on Investment.* This is an analysis that determines if a project would be attractive for private investment given the inputs that are described above. This would be a dynamic analysis and would look at the value of the project over time. In the case where development scenarios find that projects would be infeasible, LWC will provide a gap funding analysis including recommended changes to Piedmont development standards to make scenario feasible.

**B. Recommendations: Housing Element (LWC).** LWC will develop recommendations for how the future Housing Element Update will affirmatively further fair housing, informed by the discussion and feedback from the Task 3A (Community Event #1: Guiding Principles) and the resulting Guiding Principles Memo. Recommendations will include:

- An evaluation of the Housing Element's available land inventory, recommendations for retention of existing sites, and identification of possible additional sites;
- Identification of zoning district changes to accommodate additional ADUs, residential mixed-use, and multi-family development needed;
- An exploration of approaches to inclusivity and fair housing pursuant to HCD guidance; and
- A strategic plan for new programs, which may include but are not limited to inclusionary zoning, a housing trust fund, a city-initiated lot merger program, and a lot split program.

This exercise will be based on an assumed need for a minimum of 50 new mixed-use multi-family housing units and 270 new affordable ADUs and JADUs.

**C. Recommendations: Objective Development and Design and Standards (LWC).** The consultant team will analyze requirements and consider best practices for

objective development and design for multi-family and mixed-use development in Piedmont's Zones C and D. This effort will be concurrent with, and informed by the findings of, Task 3A. The analysis will include:

- Lot testing on sample lots/sites. Lot testing will explore architectural context, massing, and building-to-street relationship. The team will identify the context and characteristics of existing multi-family and residential mixed-use sites, including prominent architectural style, streetscape pattern, access, building materials, building articulation, landscape, window and door design and materials, and other characteristics. This work will occur in the context of inputs from the economic analysis.
- Drafting of Standards. Recommended standards will address basic development standards (setback, height, lot coverage, parking, etc.) as well as design standards (façade articulation, window design, roof design, etc.). Standards will be written to support best practices in sustainability and green building, including energy-efficiency and efficient site planning. Standards will also promote community health through facilitation of transit access and design for all ages, abilities, and backgrounds.

Recommendations on design standards will meet requirements in applicable law including those in SB 35 and SB 330.

- D. Recommendations: Amendments to ADU Ordinance and ADU Incentives (OpenScope and LWC).** The consulting team will identify potential funding sources to support local incentives for the construction of income-restricted ADUs. The team expects this to include collaboration with one or more non-governmental organizations that have expertise in a broader range of affordable housing. In addition, the consulting team will recommend updates to Piedmont's Accessory Dwelling Unit Ordinance, Division 17.38, to create new incentives for the construction of ADUs that are affordable to residents with low and very low incomes. At the direction of City staff, the consulting team will draft language for administrative review and potential inclusion in the City's Accessory Dwelling Unit Ordinance.

#### TASK 3 DELIVERABLES:

- » Economic Feasibility Studies
- » Strategies to Affirmatively Further Fair Housing
- » Available Land Inventory
- » Objective Development and Design Standards: Assessment and Recommendations
- » ADU Ordinance and Incentives: Assessment and Recommendations

## Task 4: Administrative Drafts

- A. Administrative Review Draft Objective Development and Design Standards (LWC).** The consulting team will prepare Administrative Review Draft Objective Zoning and Design Standards. The Administrative Review Draft will reflect feedback from public outreach events and public hearings.

- B. Administrative Review Draft Amendments to ADU Ordinance and ADU Incentives (OpenScope and LWC).** The consulting team will prepare Administrative Review Draft Amendments to the ADU Ordinance and ADU Incentives. The Administrative Review Draft will reflect feedback from public outreach events and public hearings.
- C. Administrative Review Draft ADU and JADU Prototype Drawings (OpenScope).** The consulting team will develop two floor plans for free-standing ADUs and produce elevations for each floor plan in at least three different architectural styles (Craftsman, Tudor, and Spanish Colonial). The consulting team recommends a studio ADU and a 1-bedroom ADU, but the unit types can be adjusted based on City staff input.

The consulting team will also develop a floor plan for the conversion of a typical two-car garage into a JADU. The team does not anticipate developing elevations for the JADU.

The deliverables will include presentation plans and elevations, and simple 3D views of the free-standing ADUs; as well as scaled technical plans and elevations of the ADUs and JADU formatted onto standard 24x36 title blocks suitable for incorporation into a permit-submittal drawing set. The designs will be code-compliant, practical and feasible, and will identify typical materials and assemblies. The drawing sets will not include site plans, structural engineering, energy reports, and other technical documents and details specifically required for permitting.

#### TASK 4 DELIVERABLES:

- » Admin Review Draft Objective Development and Design Standards
- » Admin Review Draft Amendments to ADU Ordinance and ADU Incentives
- » Admin Review Draft ADU and JADU Prototype Drawings

### Task 5: Environmental Review (Rincon)

Rincon consultants will apply their housing program CEQA expertise and experience in an advisory and technical support role to the project team and City of Piedmont. In this capacity, they will advise the City on CEQA process, procedure and technical analysis. This assistance could include preliminary screening of environmental constraints on potential housing sites to help inform the CEQA and planning approach.

### Task 6: Public Review and Adoption

- A. Planning Commission Hearing (LWC).** The consulting team will present Hearing Draft Objective Development and Design Standards; Hearing Draft Amendments to ADU Ordinance and ADU Incentives; and Hearing Draft ADU and JADU Prototype Drawings at one Planning Commission hearing.
- B. City Council Hearing (LWC).** The consulting team will present Hearing Draft Objective Development and Design Standards; Hearing Draft Amendments to ADU Ordinance and ADU Incentives; and Hearing Draft ADU and JADU Prototype Drawings for adoption at one City Council hearing.

## TASK 6 MEETINGS:

- » Planning Commission Hearing
- » City Council Hearing

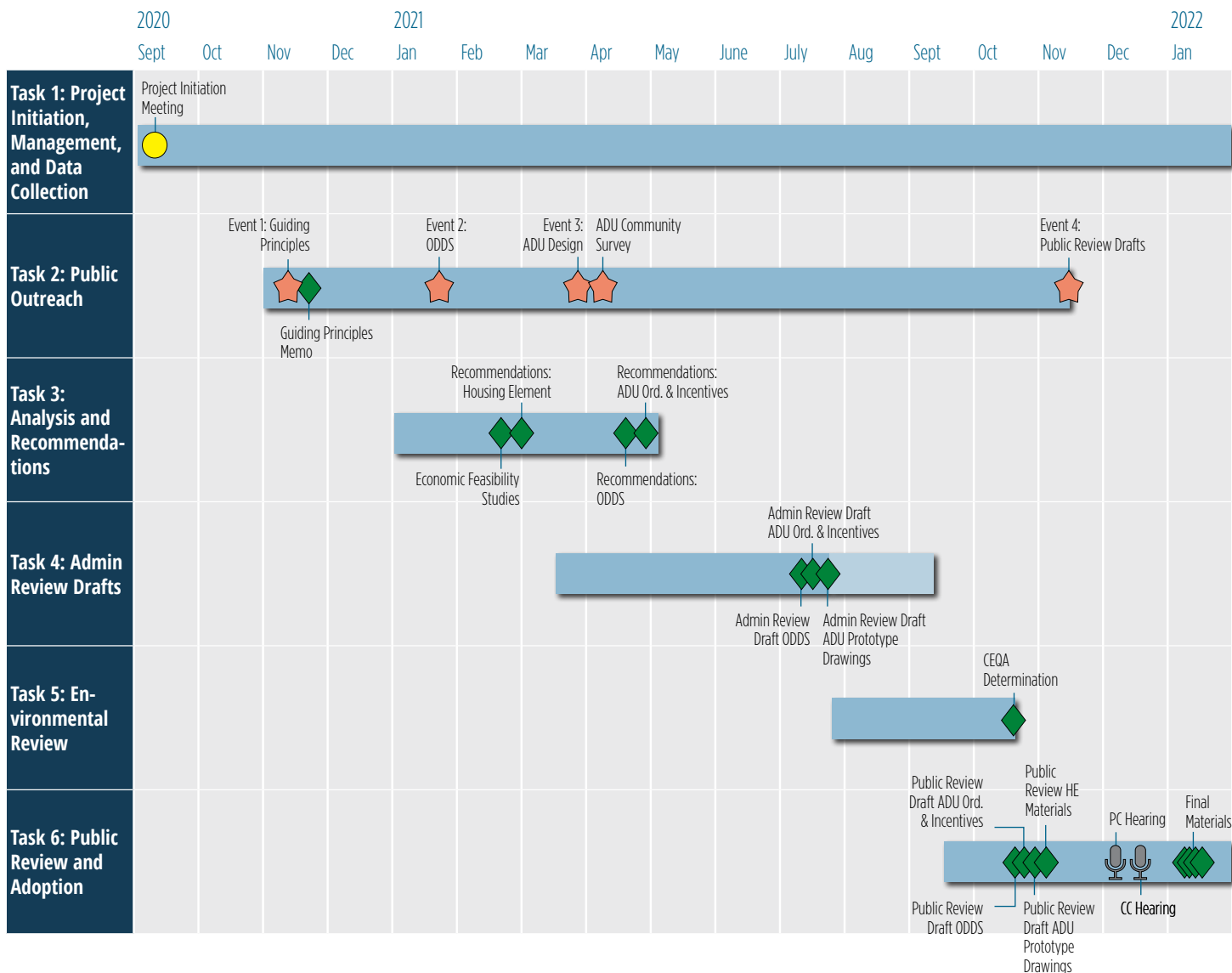
## TASK 6 DELIVERABLES:

- » Public Review Draft Materials (PDFs)
- » Hearing Draft Materials (PDFs)
- » Final Objective Development and Design Standards (PDFs and all native files, which may include Word, InDesign packages, SketchUp, and Illustrator files)
- » Final Amendments to ADU Ordinance and ADU Incentives (PDFs and all native files, which may include Word, InDesign packages, SketchUp, and Illustrator files)
- » Final ADU and JADU Prototype Drawings (PDFs and all native files, which may include Word, InDesign packages, SketchUp, and Illustrator files)

## Optional Tasks

- A. Project Website.** The consulting team will provide information for the City's website including text, photographs, maps, renderings, and other images, and information to explain the project's process. LWC anticipates that the City will upload material provided by the consulting team to the project page on the City website. The site may include a link to social media, an email list-serve sign-up so community members can stay engaged and advised on upcoming meetings, and access to project-related material and drafts for public review.
- B. Social Media.** LWC will engage an outreach social media platform (at the City's discretion) such as NextDoor, mySidewalk, or PlaceSpeak, to create an interactive on-line place for ongoing comments, input on project topics, and feedback on the process.
- C. ADU Prototypes.** The ADU and JADU drawing sets will be developed to include structural engineering, energy reports, specifications and construction details to comply with Piedmont's plan submittal requirements. The plan sets would be intended to be 'permit-ready' with exception of site-specific items such as a site plan and a utility plan.
- D. CEQA.** Rincon will prepare the CEQA documentation and manage the CEQA process for the program. The appropriate CEQA document is anticipated to be a programmatic Categorical Exemption or Initial Study-(Mitigated) Negative Declaration, but this would be confirmed through initial analysis and program evaluation.
- E. Staff Training.** The consulting team will design and conduct one or more training sessions for city staff following adoption of the objective development and design standards. The training sessions are intended to streamline housing production by assisting staff in interpreting and implementing the ODDS.
- F. Other,** as determined by research or as directed by staff.

# F. Project Schedule



# G. Project Budget

LWC Cost Table  
City of Piedmont SB 2 Planning Grant Mixed-Use and Multi-family Objective Design Standards and Prototype Plans and Incentives for Accessory Dwelling Units

Task	LWC, Inc.												Open Scope Studio	RINCON	Project Total		
	Principal \$275		Director \$205		Senior \$180		Associate \$145		LWC, Inc. TOTAL		Hours	Cost				Cost	Cost
	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost							
<b>Task 1: Project Initiation, Management, and Data Collection</b>	Task 1A: Project Initiation Meeting	3	\$ 825	4	\$ 820	4	\$ 720	-	\$ -	11	\$ 2,365	500	\$ 500	\$ 3,365			
	Task 1B: Project Management	2	\$ 550	2	\$ 410	8	\$ 1,440	8	\$ 1,160	20	\$ 3,560	-	\$ -	\$ 3,560			
	Task 1C: Document Review and Data Collection	1	\$ 275	2	\$ 410	8	\$ 1,440	8	\$ 1,160	19	\$ 3,285	7,000	\$ 7,000	\$ 10,285			
	Task 2A: Outreach Event #1 - Guiding Principles	4	\$ 1,100	4	\$ 820	16	\$ 2,880	16	\$ 2,320	40	\$ 7,120	-	\$ -	\$ 7,120			
	Task 2B: Outreach Event #2 - ODDS	4	\$ 1,100	4	\$ 820	32	\$ 5,760	32	\$ 4,640	72	\$ 12,320	-	\$ -	\$ 12,320			
	Task 2C: Outreach Event #3 - ADU Design	-	\$ -	8	\$ 1,640	16	\$ 2,880	8	\$ 1,160	32	\$ 5,680	3,500	\$ 3,500	\$ 9,180			
<b>Task 2: ADU Community Survey</b>	Task 2D: ADU Community Survey	8	\$ 2,200	8	\$ 1,640	20	\$ 3,600	22	\$ 3,190	58	\$ 10,630	3,500	\$ 3,500	\$ 14,130			
	Task 2E: Outreach Event #4: PRD	-	\$ -	-	\$ -	24	\$ 4,320	24	\$ 3,480	48	\$ 7,800	500	\$ 500	\$ 8,300			
	Task 3A: Economic Feasibility Studies	8	\$ 2,200	34	\$ 6,970	8	\$ 1,440	-	\$ -	50	\$ 10,610	-	\$ -	\$ 10,610			
	Task 3B: Recommendations - HE	8	\$ 2,200	8	\$ 1,640	40	\$ 7,200	32	\$ 4,640	88	\$ 15,680	-	\$ -	\$ 15,680			
	Task 3C: Recommendations - ODDS	8	\$ 2,200	-	\$ -	40	\$ 7,200	32	\$ 4,640	80	\$ 14,040	-	\$ -	\$ 14,040			
	Task 3D: Recommendations - ADU Ordinance and Incentives	4	\$ 1,100	-	\$ -	16	\$ 2,880	16	\$ 2,320	36	\$ 6,300	7,500	\$ 7,500	\$ 13,800			
<b>Task 4: Admin Review Drafts</b>	Task 4A: Admin Review Draft ODDS	-	\$ -	-	\$ -	16	\$ 2,880	16	\$ 2,320	32	\$ 5,200	-	\$ -	\$ 5,200			
	Task 4B: Admin Draft ADU Ordinance and ADU Incentives	-	\$ -	-	\$ -	4	\$ 720	4	\$ 580	8	\$ 1,300	2,500	\$ 2,500	\$ 3,800			
	Task 4C: Admin Draft ADU and JADU Prototype Drawings	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	15,000	\$ 15,000	\$ 15,000			
	<b>Task 5: Environmental Review</b>	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ -	-	\$ 4,500	\$ 4,500			
<b>Task 6: Public Review and Adoption</b>	Task 6A: Planning Commission Hearing	4	\$ 1,100	4	\$ 820	8	\$ 1,440	8	\$ 1,160	24	\$ 4,520	-	\$ -	\$ 4,520			
	Task 6B: City Council Hearing	4	\$ 1,100	4	\$ 820	8	\$ 1,440	8	\$ 1,160	24	\$ 4,520	-	\$ -	\$ 4,520			
	<b>TOTAL BASE FEE</b>									<b>114,930</b>	<b>\$40,000</b>	<b>\$5,000</b>	<b>\$159,930</b>				

# Appendix: Key Staff Resumes



## LISA WISE, AICP *President, Owner*

As a certified planner and public accountant, Lisa has over 30 years of experience in land development codes, zoning code updates, specific plans, housing policy, financial feasibility analysis, and the economic assessment of land use. Lisa is considered a national expert on code reform and housing policy and the former Treasurer and Chair of the Form Based Code Institute (FBCI) and certified instructor for the FBCI instructional courses.

Lisa has been directly responsible for a breadth of projects that assess land use regulation, economic and fiscal performance, and make recommendations for more vibrant and resilient communities. These include over 34 code updates, 35 economic projects, 23 master and specific plans, 20 housing elements, and several inclusionary and employee housing studies. Her work also includes Project Manager of Form Based Code Framework and Update in Riyadh (7 million pop.), and a Framework and Form Based Code in the western part of Saudi Arabia.

Prior to starting LWC in 2006, Lisa worked for land use planning firm Crawford, Multari & Clark Associates. From 1990 to 1999, Lisa was a Manager at PricewaterhouseCoopers (PwC), one of the “Big Four” international accounting, financial services and management consulting firms.

### Relevant Project Experience:

- Alameda County, CA, Ashland Cherryland Business District Specific Plan Update and Form-Based Code
- Austin, TX, Land Development Code Update
- Benicia, CA, Mixed-Use Master Plan and Form-Based Code
- Beverly Hills, CA, Economic Sustainability Plan
- Cincinnati, OH, Neighborhood Annexation Form Based Code Study
- Flagstaff, AZ, Zoning Ordinance Update
- Grover Beach, CA, Zoning Code Update and West Grand Ave. Master Plan
- Hayward, CA, Downtown Specific Plan and Form-Based Code
- Kingsburg, CA, Development Code Update, Form-Based Code, and Economic Study
- Las Vegas, NV, Downtown Form-Based Code
- Livermore, CA, Development Code Update
- Lompoc, CA, Zoning Code Update
- Long Beach, CA, Short Term Rental Housing Program and Regulations
- Malibu, CA, Zoning Code and Local Implementation Plan Update
- Mesa, AZ, Form-Based Code and Regulating Plan
- Petaluma, CA, SMART Rail Station Areas: TOD Master Plan
- Richmond, CA, Livable Corridors Plan and Form-Based Code
- San Luis Obispo, CA, Economic Development Strategic Plan
- San Luis Obispo, CA, San Luis Ranch Specific Plan and Code
- Soledad, CA, Downtown Specific Plan, Vision, and Form-Based Code
- Tehachapi, CA, Zoning Code Update, Housing Element 4th/5th Cycle
- Westerville, OH, Zoning Code Update



### PAST WORK EXPERIENCE

- California Polytechnic State University  
San Luis Obispo, CA, Adjunct Faculty, 2002 - Present
- Crawford, Multari & Clark Associates  
San Luis Obispo, CA, Professional Consultant,  
2001 - 2006
- San Luis Obispo County  
San Luis Obispo, CA, Staff Planner, 2000 - 2001
- Governor's Office of Planning & Research  
Sacramento, CA, Intern, 1999 - 2000
- PricewaterhouseCoopers, LLP  
New York, NY, Financial Services Manager, 1990 - 1999

### EDUCATION

- California Polytechnic State University  
San Luis Obispo, CA, Master of City & Regional  
Planning, 2001
- DePaul University  
Chicago, IL, M.S. Accountancy, 1990
- University of Cincinnati  
Cincinnati, OH, B.S. Business Administration in  
Marketing & Finance, 1987

### CERTIFICATIONS & MEMBERSHIPS

- American Planning Association (APA)  
2001 - Present
- Certified Public Accountant, 1991
- Congress for the New Urbanism (CNU)  
2003 - Present  
Paul Crawford Award for Excellence in Planning, 2017
- Form-Based Code Institute  
Chair, 2015 - 2018; Treasurer, 2014 - 2015
- Dean's Leadership Council  
California Polytechnic State University, College of  
Architecture and Environmental Design  
2018 - Present

# DAVID BERGMAN

## Director

With over 25 years of experience, David has focused on real estate, community development and urban planning projects, with an emphasis on the formation and implementation of urban and regional development strategies, public private-partnerships, and the role of art and culture in economic development. David's background includes an expertise in public policy and alternatives analysis that balance compliance with applicable law, economic feasibility, fiscal performance and community vision.

David's commitment to client service centers around providing preferred strategies based on data and market-driven financial results. His experience features large-scale mixed-use and urban infill developments, and planned communities. He has provided feasibility analysis and funding strategies across all major property sectors including residential, retail, office, industrial, hospitality, and institutional. David also brings a deep understanding of the potential fiscal and economic impacts of events, programs and public art installations for high-profile U.S. and international clients.

Additionally, David has strong public sector management and academic leadership experience. He is the former Director of Planning for the City of South Pasadena, CA where he was responsible for management of current and long-range planning as well as the City's Building and Safety Department and code enforcement functions. At the City of Santa Cruz, CA, David was the manager of special projects for the City's Economic Development Department.

Recent examples of David's work include:

- Pasadena, CA, General Plan Economics and Land Use Element
- Long Beach, CA, Housing Element Update
- Santa Clarita, CA, General Plan Economics and Land Use Element
- Los Angeles, CA, Economic and Fiscal Impact Study, Los Angeles International Airport (LAX)
- Beverly Hills, CA, Fiscal Impacts
- Coachella Music and Arts Festival, Marketing and Promotion Programs, and Economic Impacts
- TOD Economic Strategies
- Public-Private Partnerships Structures for Infrastructure Development



### PAST WORK EXPERIENCE

#### Metropolitan Research and Economics

Santa Monica, CA, Principal, Director and Owner  
2009 - 2020

#### City of South Pasadena, CA

Director, Planning and Building  
2018 - 2019

#### City of Santa Cruz, CA

Manager of Special Projects, Economic  
Development  
2014 - 2017

#### Economics Research Associates

Los Angeles, CA, Principal  
1996 - 2009

### EDUCATION

#### University of California

Los Angeles, CA, Master of Arts, Geography  
Urban Planning

#### University of Wisconsin

Madison, WI, B.A., Geography and Classical  
History

### ACADEMIC EXPERIENCE

#### University of Southern California

School of Architecture, 2016 - 2019

#### Southern California Institute of Architecture

2001 - 2016

#### University of Michigan

School of Architecture, 2009 - 2010





# MONICA SZYDLIK, AICP

## Senior Associate

Monica brings over 16 years' experience in planning and design to the firm. Her career has focused on leading transit-oriented development plans, streetscape design, design guidelines, form-based development regulations, and zoning code updates. Her skills include managing multi-disciplinary teams, clear and informative communication with client and team members, facilitating community outreach events, and coordinating presentations and deliverables. Monica integrates graphic tools into her work such as 3-D modeling and diagramming and photo simulations. Monica's background includes and emphasis on architecture and landscape design.

The core of Monica's professional career is physical planning and urban design with an emphasis on supporting livable and sustainable neighborhoods and communities. Monica holds a Master of Architecture from the University of Michigan, Ann Arbor, and a Bachelor of Arts in History from the University of California, Berkeley.

### Relevant Project Experience:

- Avondale, AZ, Avondale City Center Specific Area Plan
- Belmont, CA, Belmont Village Specific Plan
- Burbank, CA, Single-Family Neighborhood Compatibility and Design Project
- Honolulu, HI, Downtown and Kalihi Neighborhood TOD Plans
- Honolulu, HI, Public Views Study
- Livermore, CA, Isabel Neighborhood Plan and EIR
- Los Altos, CA, Objective Design Standards
- Paso Robles, CA, Beechwood Specific Plan
- Oakland, CA, Oakland-Alameda Freeway Access Plan
- Redwood City, CA, Hillside Regulations
- Redwood City, CA, Residential Design Guidelines
- San Bruno, CA, Bayhill Specific Plan
- San Diego, CA, Mission Valley Community Plan - Urban Design
- San Francisco, CA, Bayshore Station Relocation Project
- San Jose, CA, Santana Row/Valley Fair and Winchester Boulevard Urban Village Master Plans
- San Pablo, CA, San Pablo Avenue Specific Plan
- Santa Cruz County, CA, Santa Cruz County Accessory Dwelling Unit Study
- South Lake Tahoe, CA, Tahoe Valley Development and Design Standards
- South San Francisco, CA, El Camino Real/Chestnut Avenue Area Plan
- St. Helena, CA, Zoning Code Update
- Tehachapi, CA Oak Tree Village Specific Plan
- Vacaville, CA, Land Use and Development Code Audit
- Woodland, CA, Comprehensive Zoning Code Update



### PAST WORK EXPERIENCE

Dyett & Bhatia Urban and Regional Planners  
Oakland, CA, Senior Associate, 2006 - 2018

Kirk Miller Affiliates  
San Francisco, CA, Architectural Designer, 2005-2006

### EDUCATION

University of Michigan, Ann Arbor  
Master of Architecture

University of California, Berkeley  
B.A. History

### CERTIFICATIONS & MEMBERSHIPS

American Institute of Certified Planners  
2017 - Present  
License #330767

### AWARDS

APA, California Chapter Award of Excellence, 2018  
Belmont Village Specific Plan

APA, Hawaii Chapter Honor Award for Urban Design, 2016  
Downtown and Kalihi Neighborhood TOD Plans

APA, California Northern Section Award of Honor for Neighborhood Planning, 2012  
El Camino Real/Chestnut Avenue Area Plan

APA, Arizona Chapter Award, Master Plan Category, 2009  
Avondale City Center Specific Area Plan

# SPENCER JOHNSON, CNU-A

## Lead Associate

Spencer focuses on urban and graphic design, hybrid codes, long-range planning, land use economics, and strategies that cater, very specifically to the client needs. Spencer works closely with subconsultant partners and clients to develop graphics, conduct research, facilitate community engagement efforts and produce effective reports. Spencer brings technical expertise in graphic design and modeling software (Adobe Creative Suite and SketchUp) and participates in all aspects of LWC projects from initiation to completion.

Spencer has been appointed Deputy Project Manager on several projects, including the City of Westerville, OH Zoning Code Update, City of Henderson, NV Development Code Update, and the City of Las Vegas, NV Downtown Form-Based Code, where he helped facilitate formal educational activities and documented and analyzed development patterns and conditions. In January 2018, Spencer earned the Congress for the New Urbanism accreditation (CNU-A) through the University of Miami School of Architecture and he currently serves as the Subsection Director of the American Planning Association (APA), California Central Coast Chapter, San Luis Obispo Subsection.

Prior to LWC, Spencer worked at the San Francisco-based urban design and architecture firm, Van Meter Williams Pollack LLP (VMWP) where he assisted in the design of several TOD and affordable housing projects. Spencer holds a Bachelor of Science degree in City & Regional Planning from California Polytechnic State University, San Luis Obispo.

### Relevant Project Experience:

- Alameda County, CA, Castro Valley General Plan Implementation
- Austin, TX, Land Development Code Update
- Compton, CA, Artesia Station Transit-Oriented Development Specific Plan
- Eureka and Shelter Cove, CA, Community Sustainability Plans
- Hayward, CA, Downtown Specific Plan and Code
- Henderson, NV, Development Code Update
- Iowa City, IA, Form-Based Code
- Las Vegas, NV, Downtown Form-Based Code
- Lompoc, CA, Zoning Code Update
- Mammoth Lakes, CA, Conceptual Land Use Plan
- Marin County, CA, Code Amendments
- Marin County, CA, Short-Term Vacation Rentals Report
- Paso Robles, CA, Beechwood Specific Plan
- San Luis Obispo, CA, San Luis Ranch Specific Plan
- Seaside, CA, General Plan Update Market Report
- Tehachapi, CA, Oak Tree Village Specific Plan
- Tempe, AZ, Transportation Overlay District Code Update
- Westerville, OH, Zoning Code Update



### PAST WORK EXPERIENCE

#### Van Meter Williams Pollack LLP

San Francisco, CA, Intern, Urban Design  
January 2015 - September 2015

#### Northern Tool & Equipment

Faribault, MN, Intern, Design Engineering  
June 2014 - August 2014

#### California Polytechnic State University

San Luis Obispo, CA, Event Planner  
August 2013 - June 2016

### EDUCATION

#### California Polytechnic State University

San Luis Obispo, CA, B.S., City & Regional  
Planning

### CERTIFICATIONS & MEMBERSHIPS

#### Congress for the New Urbanism

Accredited Professional, 2018 - Present

#### American Planning Association

Subsection Director, San Luis Obispo, CA Central  
Coast, 2019 - Present  
Membership Inclusion Officer, CA Central Coast,  
2018 - 2019  
Member, 2015 - Present

#### California Polytechnic State University

'Best Collaborator' Designation  
Associated Students in Planning, Vice President,  
2013 - 2014

#### League of American Bicyclists

Bicycle Friendly Communities Gold Rating  
Contributor for San Luis Obispo



# Mark Hogan

**AIA, LEED BC+D, NCARB**

OpenScope Studio  
Principal

1776 18th Street  
San Francisco, CA 94107

**P** (408) 478-4206 | *direct*  
**P** (415) 891-0954 | *office (main)*  
**E** markhogan@openscopestudio.com

Mark is an architect whose primary professional interest is improving cities by creating places people want to live and spend time via good design and improved land use policies. Prior to joining OpenScope, he was an Associate at David Baker Architects where he worked on large infill housing projects throughout the San Francisco region. He has also worked for the London office of Skidmore, Owings and Merrill.

He has written on a variety of topics in publications including SPUR's magazine *The Urbanist*, *Disegno*, *The RIBA Journal* and *BOOM: A Journal of California*. He is also a senior lecturer teaching architecture studios at the California College of the Arts. Recently, he has worked with both the San Francisco Planning Department and city legislators to shape Accessory Dwelling Unit policy. Mark is a licensed architect in the states of New York and California and is NCARB certified. He holds an M. Arch. from UC Berkeley and a BFA from the University at Buffalo.

## WORK HISTORY

California College of the Arts  
San Francisco, CA | 2014-

David Baker Architects  
San Francisco, CA | 2007-09, 2011-13

Skidmore Owings and Merrill  
London, UK | 2010-11

Center for the Built Environment  
Berkeley, CA | 2004-06

## EDUCATION

M. Arch  
University of California  
Berkeley, CA

BFA  
University at Buffalo  
Buffalo, NY

## SELECTED PROJECTS

The Yard at Mission Rock  
San Francisco, CA

The Rivermark  
West Sacramento, CA

Lakeside Senior Housing  
Oakland, CA  
LEED Gold Anticipated

300 Ivy  
San Francisco, CA  
LEED Platinum

JTI International Headquarters  
Geneva, Switzerland

Tassafaronga Village  
Oakland, CA  
LEED Platinum

Kinsell Commons  
Oakland CA  
LEED Platinum  
Build it Green Rated

\*Resume encompasses experience prior to OpenScope Studio



## Ian Dunn

**AIA, LEED BC+D**

OpenScope Studio  
Principal

1776 18th Street  
San Francisco, CA 94107

**P** (415) 310-8092 | *direct*  
**P** (415) 891-0954 | *office (main)*  
**E** iandunn@openscopestudio.com

Ian has over 20 years of experience designing urban infill developments and award-winning civic buildings, education facilities, single-family residences, and multi-family housing. He has successfully managed dozens of commissions, ranging from modest remodels to \$150 million residential buildings, and has fostered strong relationships among the public agencies, contractors, consultants, and developers that make complex projects in San Francisco successful.

He is currently the principal of OpenScope Studio, and was formerly a Senior Associate at David Baker Architects – nationally-renowned experts in sustainable mixed-use urban developments and multi-family housing. He is also a senior lecturer at the California College of the Arts where he teaches architectural design, and lectures on contemporary issues in urban multi-family housing. His technical interests and expertise include sustainable architecture, building envelope and curtainwall detailing, and digital modeling and fabrication. Ian has been a licensed architect in California since 1998, and holds an M. Arch. from Columbia University, and a BA Arch. from UC Berkeley.

### WORK HISTORY

California College of the Arts  
San Francisco, CA | 2011-09, present

David Baker Architects  
San Francisco, CA | 2005-03, 2013-02

Ian Birchall & Associates, Architects  
San Francisco, CA | 2003-10, 2005-02

Heintges & Associates  
New York City, NY | 2003-05, 2003-08

Martinez + Cutri, Architects  
San Diego, CA | 1991, 2000

### EDUCATION

M. Arch  
Columbia University  
New York, NY

BFA  
University of California, Berkeley  
Berkeley, CA

### SELECTED PROJECTS

Santa Clara Sustainable  
Santa Clara, CA

Saint Frank Coffee  
San Francisco, CA

Polka Dot Preschool  
San Francisco, CA

Potrero 1010 Housing  
San Francisco, CA

Fillmore Park Housing  
San Francisco, CA

Armstrong Senior Housing  
San Francisco, CA

Crescent Cove Apartments  
San Francisco, CA

\*Resume encompasses experience  
prior to OpenScope Studio



# Mary Davis

**Assoc. AIA**

OpenScope Studio  
Associate

E marydavis@openscopestudio.com

Mary comes with a background in architecture, landscape architecture and urban design. She has experience in both large planning, tenant improvement and multi-family residential projects. She is currently working on projects with the San Francisco ADU program.

With several years working for the San Francisco Planning and Urban Research Association (SPUR), Mary brings a strong knowledge and love of the history and politics of San Francisco's built environment.

## WORK HISTORY

OpenScope Studio  
San Francisco, CA (current)

Angela Matt Architects, Inc.  
San Francisco, CA (2016 - 18)

Old Farmer Landscape Architects  
Taipei, Taiwan (2013 - 15)

San Francisco Planning and Urban  
Research Association (SPUR)  
San Francisco, CA (2009 - 12)

Wolf & Berghen Architects  
San Francisco, CA (2008 - 13)

Plum Architects  
San Francisco, CA (2007 - 08)

## EDUCATION

M.Arch  
University of Michigan  
School of Architecture  
Ann Arbor, MI

BA  
Trinity College  
Hartford, CT

## QUALIFICATIONS & MEMBERSHIPS

Assoc. AIA, ACLU

San Francisco Planning and Urban  
Research Association (SPUR)

\*Resume encompasses experience  
prior to OpenScope Studio

## SELECTED PROJECTS

Veritas Investments  
San Francisco, CA  
Addition of accessory dwelling units into  
30+ large apartment buildings in San  
Francisco

University of Macao  
Campus Plazas  
Macao  
Redesign of the Main Library and  
Administration plazas

Hai-an Boulevard Design  
Tainan, Taiwan  
Invited international competition to  
redesign a major city boulevard to  
prioritize the pedestrian experience

National Taiwan University Healing  
Garden  
Taipei, Taiwan

## COMMUNITY INVOLVEMENT

Friends of the Urban Forest

San Francisco Botanical Garden

Alemany Community Farm

Swing Left, Sister District



## Abe Leider, AICP CEP

**TITLE:** PRINCIPAL PLANNER

**PROJECT ROLE:** PRINCIPAL-IN-CHARGE

Abe Leider is a Principal in Rincon's Environmental Sciences and Planning group and manager of Rincon's Oakland office. He is responsible for management and preparation of planning and environmental documents and specialized technical studies. Mr. Leider has over 20 years of experience in the planning field and has managed or primarily authored successful planning and environmental documents on subjects ranging from regional resource management and land use regulation to complex public and private development projects. He is proficient at interpreting state and federal planning and environmental regulations and guidelines as well as developing thorough and clear environmental documentation. Mr. Leider is experienced at providing professional contract planning support in all facets of the project review and permitting process to small, mid-sized and large jurisdictions throughout California. He has prepared informational and technical reports on a range of planning and environmental topics, including general land use trends, agriculture, biology and aesthetics/visual resources.

### EDUCATION

BA, English and Environmental Studies, University of California at Santa Barbara

### CERTIFICATIONS

Professional Certificate in Land Use and Environmental Planning, UCSB Extension

American Institute of Certified Planners, Certified Environmental Planner

### AWARDS

Planning Excellence for Best Practice – Ashland Cherryland Specific Plan, County of Alameda, American Planning Association (APA) Nor Cal Chapter (shared), The Next Downtown, City of Los Angeles, APA, Los Angeles Chapter (shared)

### SELECT PROJECT EXPERIENCE

Principal in Charge or Project Manager for the following:

- City of Berkeley – Adeline Corridor Specific Plan EIR
- County of Alameda – Fairview Area Specific Plan IS-MND
- City of Berkeley – Southside Zoning Ordinance Amendments Project EIR
- City of Palo Alto – Cubberley Community Center Concept Plan IS-MND
- County of Alameda – Ashland-Cherryland Business District Specific Plan EIR
- City of Redwood City – Mixed-Use Live/Work and Emergency Shelter Zoning Amendment Project Addendum EIR
- County of Alameda – General Plan EIR Addendum for Innovative Housing Program
- City of San Leandro – Bay Fair BART TOD Specific Plan EIR
- City of Berkeley – On Call Planning and Environmental Services (multiple projects)
- City of Palo Alto – On Call Environmental Planning (multiple projects)
- City of Concord – On Call Contract Planning and CEQA/NEPA Environmental Services (multiple projects)
- City of Hayward – On Call Environmental Planning (multiple projects)
- City of San Leandro – On Call Environmental Planning (multiple projects)
- City of Los Angeles – Planning Services (multiple projects)
- Major Contract Planning Projects, Cities of Ojai and Port Hueneme (multiple projects)





## Karly Kaufman, MESM

**TITLE:** SUPERVISING ENVIRONMENTAL PLANNER/PROJECT MANAGER

**PROJECT ROLE:** PROJECT MANAGER

Karly Kaufman serves as a Supervising Environmental Planner/Project Manager within Rincon's Environmental Science and Planning group. In this capacity, she is involved in managing and preparing CEQA and NEPA documentation and technical air quality, greenhouse gas, and noise impact analyses. Ms. Kaufman manages and prepares environmental documents for a diverse range of projects including general plans, specific plans, residential and commercial development projects, and infrastructure projects. She has prepared Environmental Impact Reports, Initial Studies, Negative Declarations, and Categorical Exemptions. She is experienced with the CalEEMod land use emissions model and a variety of other air pollutant and greenhouse gas emissions models including EMFAC 2011 and CALINE4. Ms. Kaufman specializes in organizing outreach and educational campaigns for a variety of audiences on both the national and local levels. Previous outreach campaigns have included: grassroots and community organizing, legislative and issue advocacy, fundraising and member recruitment, survey design, and educational campaigns for K-12 students and senior citizens. She is also a proficient public presenter.

### EDUCATION

MESM with emphases in Energy and Climate as well as Water Resources Management, Bren School of Environmental Science & Management, University of California, Santa Barbara

BS, Environmental Policy Analysis and Planning, University of California, Davis

### AFFILIATIONS

Board Member, Association of Environmental Professionals, SF Chapter

### CERTIFICATIONS

AEP Spring 2020 CEQA Advanced Workshop  
AEP Summer 2013 CEQA Legislative Update Workshop  
HUD Winter 2014 NEPA Training

### SELECT PROJECT EXPERIENCE

#### SOUTH BAY PROJECTS

- City of Palo Alto – Planning and Community Environment Department
- 2755 El Camino Real Residential Project IS-MND
- 3225 El Camino Real Mixed-Use Project IS-MND
- 1700 Embarcadero Road Auto Dealership IS-MND
- 3045 Park Boulevard R&D Project IS-MND
- 2747 Park Boulevard R&D Project IS-MND
- 4256 El Camino Real Hotel Project EIR
- CEQA Procedures Manual and Templates
- Cubberley Concept Plan IS-MND
- City of Mountain View - 1696-1758 Villa Street Residential Project EIR
- City of Santa Clara - Single-Use Carryout Bag Reduction Ordinance IS-ND
- City of Berkeley – Southside Zoning Ordinance Amendments Project EIR

#### PROGRAMMATIC CEQA DOCUMENTATION

- City of Berkeley – Southside Zoning Ordinance Amendments EIR
- City of Berkeley – Adeline Corridor Specific Plan EIR
- City of San Leandro Community Development Department/Raimi & Associates - Bay Fair Transit Oriented Development (TOD) Specific Plan EIR
- Alameda County Community Development Agency/Lisa Wise Consulting - Ashland and Cherryland Business District Specific Plan EIR
- Alameda County Community Development Agency/Barry Miller Consulting - Fairview Specific Plan IS-MND
- Town of Windsor – Windsor General Plan EIR





## Kari Zajac, MESM

**TITLE:** PROJECT MANAGER

**PROJECT ROLE:** AIR QUALITY AND NOISE TECHNICAL LEAD

Kari Zajac is a project manager and technical analyst with Rincon Consultant's Environmental Science and Planning Group. Ms. Zajac has five years of experience providing CEQA/NEPA compliance and technical analysis for both public and private clients. She specializes in air quality, greenhouse gas, and noise analysis and is experienced with the California Emissions Estimator Model (CalEEMod), Road Construction Emissions Model, Roadway Construction Noise Model (RCNM), Traffic Noise Model (TNM), and Extech sound level meter operation and computer software.

### EDUCATION

MESM, Bren School of Environmental Science & Management, University of California, Santa Barbara, Specialization: Conservation Planning

BS Wildlife, Fisheries, and Conservation Biology, University of California, Davis

### AFFILIATIONS

Member, Association of Environmental Professionals

### SELECT PROJECT EXPERIENCE

- City of Union City General Plan EIR air quality, greenhouse gas (GHG), and noise analysis, City of Union City
- Cubberley Community Center IS-MND noise analysis, City of Palo Alto
- City of Novato General Plan air quality, GHG, and noise analysis, City of Novato
- Adeline Corridor Specific Plan EIR air quality and GHG analysis, City of Berkeley
- Goldman School of Public Policy EIR noise analysis, University of California Berkeley
- Silver Creek Mixed-Use Development Air Quality Study, City of San Jose
- San Jacinto Specific Plan Air Quality and Greenhouse Gas Study, City of San Jacinto
- Alamo Street Mixed Use Project Air Quality and Greenhouse Gas Study, City of Simi Valley
- Plant Expansion and Nutrient Removal Project IS-MND and Air Quality Conformity Analysis, Eastern Sierra Community Service District
- University of California Santa Cruz Kresge College EIR, Santa Cruz
- Porter Estates Company Bradley Ranch Inc. (Trio Petroleum) IS-MND, County of Monterey
- Fort Ord Regional Trail Greenway Active Transportation EIR, Transportation Authority for Monterey County
- 328 Willow Street Noise Study, City of San Jose
- Alamo Street Mixed Use Project Air Quality and Greenhouse Gas Study City of Simi Valley
- Founders Village Air Quality, Greenhouse Gas, and Noise Studies, City of Chino Hills
- Holiday Inn Express Noise Study, City of Fresno
- 1641 Mountain View Avenue Facility Noise Study City of Oxnard
- 1100 Foothill Boulevard Commercial Project Noise Study, City of Rialto
- Trumble Road Open Pit Restoration Noise Study, City of Menifee
- 2222 E First Street Noise Study, City of Santa Ana
- Irvine Ranch Water District Baker Water Treatment Plant Noise Study, City of Lake Forest







## Lucy Sundelson

**TITLE:** ASSOCIATE PLANNER

**PROJECT ROLE:** LEAD ANALYST

Lucy Sundelson is proficient in CEQA document preparation and current planning project management. Ms. Sundelson previously worked as an Assistant Planner at the City of Berkeley, where she managed Use Permit and Design Review applications. At Rincon, Ms. Sundelson specializes in CEQA project management and analysis and in contract planning services, including projects with extensive community involvement, technical resource analyses, and multiple public meetings. She has recently worked as project manager or lead analyst for numerous programmatic CEQA documents, including the Cubberley Community Center IS-MND and the Housing Incentive Program Expansion and 788 San Antonio Road Mixed-Use EIR in Palo Alto, the Southside Zoning Ordinance Amendments EIR in Berkeley, and the Downtown Precise Plan EIR in Orinda.

### EDUCATION

BA, Urban Studies, University of California, Berkeley

Career Discovery, Harvard Graduate School of Design

### SELECT PROJECT EXPERIENCE

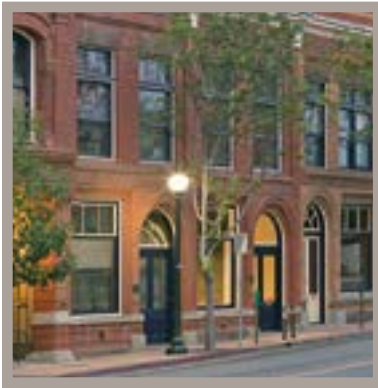
#### CEQA

- City of Palo Alto, Cubberley Community Center Master Plan IS-MND
- City of Palo Alto, Housing Incentive Program Expansion and 788 San Antonio Mixed-Use Project EIR
- City of South San Francisco, 499 Forbes Boulevard EIR
- City of Millbrae, Moxy Hotel IS-MND
- City of San Jose, Mercedes Benz IS-MND
- City of Berkeley, Adeline Corridor Specific Plan EIR
- City of Berkeley, Southside Zoning Ordinance Amendments EIR
- City of Orinda, Downtown Precise Plan EIR
- County of Alameda, Addendum to the Castro Valley General Plan EIR
- County of Alameda, Whitecotton Cottage Demolition Project EIR
- County of Alameda, Nike Missile Site Project IS-MND
- City of Sonoma, MacArthur Place Hotel Improvements IS-MND
- City of Albany, Oceanview Elementary Project Categorical Exemption

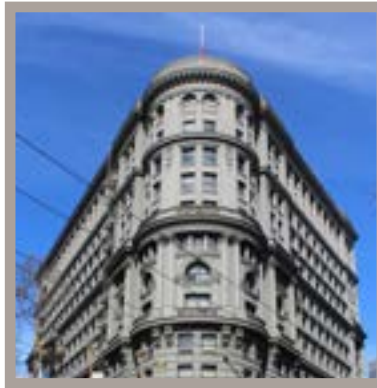
#### CURRENT PLANNING

- City of Palo Alto, Staff-Level Planning Permits and Long-Range Planning
- City of San Leandro, Staff-Level Planning Permits and Zoning Counter
- City of Berkeley, Use Permits, Appeals, Staff Reports, and Mitigation Monitoring
  - 2015 Blake Street Housing EIR and Use Permit
  - 2000 Dwight Way Senior Housing Use Permit
  - 1740 San Pablo Avenue Mixed-Use Project IS-ND and Use Permit
  - 2501 Haste Street Mixed-Use/Student Housing Use Permit
  - 1499 University Avenue Hotel Use Permit and City Council Appeal
  - 2580 Bancroft Way Housing Project Construction Mitigation Monitoring





SAN LUIS OBISPO



SAN FRANCISCO



LOS ANGELES



**City of Piedmont  
California**



**Date:** August 17, 2020  
**To:** Mayor and Council  
**From:** Kevin Jackson, Planning & Building Director  
**Subject:** Minor edits to agreement with Lisa Wise Consulting, Inc.

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Item 7 on the August 17<sup>th</sup> City Council Agenda is the consideration of a contract with Lisa Wise Consulting, Inc., to develop SB 2 housing programs in an amount not to exceed \$160,000. Subsequent to the publication of the Council Agenda Report, staff at the City and Lisa Wise Consulting noticed two sections in the contract (both found on agenda report page 8) where minor corrections and clarification were needed. The recommended edits are shown in redline below:

**Section 11. Notices**

Any notices to be sent pursuant to this Contract shall be given in writing, via facsimile and concurrently by prepaid U.S. certified or registered postage addressed to City at 120 Vista Avenue, Piedmont, California 94611, and to Independent Contractor at Lisa Wise Consulting, Inc., ~~601 California St Suite 607, San Francisco, CA 94109~~ 983 Osos Street, San Luis Obispo, CA 93401, or at such other address as each party shall give the other in writing from time to time, and notices shall be deemed received at the time of personal delivery or three (3) working days after being placed in the United States Mail, postage prepaid, certified mail, return receipt requested.

**Section 15. Termination**

The following provisions shall govern termination under this Contract:

- a. Either party may terminate this Contract for cause as follows:
  - (1) The party electing to terminate shall give the other party written notice of termination at least five (5) **business** days prior to the termination date, setting forth very specifically the grounds for termination, the specific provisions of the Contract that has been violated, and a full statement of the facts surrounding the violations(s).

The recommended corrections and clarification edits have been reviewed and approved by the City Attorney.