



City of Palo Alto

City Council Staff Report

(ID # 11320)

Report Type: Consent Calendar

Meeting Date: 6/1/2020

Summary Title: SF Foundation Challenge Grant MOU

Title: Approval and Authorization for the City Manager or Designee to Execute Memoranda of Understanding (MOUs) With the San Francisco Foundation and PolicyLink to Accept Placement of a Fellow Under the Partnership for the Bay's Challenge Grant Program; Authorization for the Mayor to Submit a Technical Assistance Request Letter

From: City Manager

Lead Department: Planning and Development Services

Recommendation

City Staff Recommends that City Council:

- Authorize the City Manager to Enter into a Memorandum of Understanding (MOU) with the San Francisco Foundation Accepting the Terms of Participation in the Challenge Grant Program;
- Authorize the City Manager to Enter into an Agreement with Policy Link for the Management of the Challenge Grant Fellow; and
- Authorize Mayor Fine to Sign a Technical Assistance Request Letter to PolicyLink that Allows the Challenge Grant Fellow to Work with the City of Palo Alto.

Executive Summary

In October 2019, City Staff submitted a Challenge Grant application to Partnership for the Bay's Future. On February 4, 2020, City Staff was notified that the City of Palo Alto had been awarded a Challenge Grant Fellow to assist in the development of legislation that would protect renters and preserve affordable housing. Employed by PolicyLink, the Fellow will work with the Planning and Development Services Department and community partners for two years. The City has worked with the San Francisco Foundation, a lead funder of the Partnership for the Bay's Future, as well as PolicyLink on the attached Memorandum of Understanding (Attachment A), Jurisdiction Partnership Agreement (Attachment B), and Technical Assistance Request Letter (Attachment C).

Background

The City Council has identified helping renters through research and implementation of policies and programs as a priority. The need for renter protections came into sharp focus for the City Council in 2018 when a property owner proposed the conversion of an existing and historically affordable apartment complex into a hotel. City Council acted on August 27, 2018, to pass an emergency ordinance that gave the tenants some relocation assistance, though all the tenants were ultimately displaced.¹ A permanent ordinance was adopted on September 17, 2018.²

Subsequently, at the City Council meeting on September 10, 2018, Councilmember DuBois introduced a Colleagues' Memorandum that called for a thorough review of renter protections.³ Council directed staff to review the existing renter protection ordinance and comparable ordinances in the San Francisco Bay Area while evaluating relocation assistance, strengthening enforcement measures, and discussing the full range of renter protections.

At the City Council meeting on September 23, 2019, Councilmembers DuBois and Kou introduced a Colleagues' Memorandum that recommended that the City pursue housing goals that would address the socio-economic diversity and affordability of the community.⁴ At that time, Council directed staff to prioritize exploring elements of the City's affordable housing activities and accelerate bringing them to the Planning and Transportation Commission and Council.

Unfortunately, due to a number of staff vacancies in the Planning & Development Services Department, staff resources and expertise in this policy area prevented progress from being made. The Challenge Grant, for which the City successfully competed, provides the needed resources to allow the City to thoughtfully pursue renter protection policies.

Discussion

The Challenge Grant Fellowship is an effort of Partnership for the Bay's Future. The Partnership for the Bay's Future (PBF) is a collaborative effort to build a prosperous, inclusive, vibrant and livable Bay Area. The Partnership launched in early 2019 with the support of the San Francisco Foundation, the Chan Zuckerberg Initiative, the Ford Foundation, Local Initiatives Support Corporation (LISC), Facebook, Genentech, Kaiser Permanente, the William and Flora Hewlett Foundation, the David and Lucile Packard Foundation, the Stupski Foundation, and Silicon Valley Community Foundation. PBF brings together leaders from community, businesses, local

¹Link to City Council Action Minutes:

<https://www.cityofpaloalto.org/civicax/filebank/blobdload.aspx?t=45199.74&BlobID=66757>

²<https://www.cityofpaloalto.org/civicax/filebank/blobdload.aspx?t=40175.38&BlobID=67002>

³<https://www.cityofpaloalto.org/civicax/filebank/blobdload.aspx?t=65189.46&BlobID=66602>

⁴<https://www.cityofpaloalto.org/civicax/filebank/blobdload.aspx?t=66804.19&BlobID=73927>

philanthropies, and government to find solutions to ensure that people of all backgrounds and economic statuses can call the Bay Area home. The PBF's goal is to increase housing affordability for all and ensure vibrant communities of racial equity and economic inclusion (Attachment D). In October of 2019, staff submitted an application for the Challenge Grant (Attachment E).

As part of this grant, talented mid-career Fellows were selected and assigned to seven jurisdictions throughout the Bay Area (see Fellow biographies in Attachment F). Palo Alto's Fellow will be responsible for facilitating the development, adoption, and implementation of innovative and high-impact policy in collaborative partnership with community and staff from departments across the City.

PolicyLink is managing the Fellowship, building a collaborative and supportive community between Fellows and providing Technical Assistance to advance the work in their assigned jurisdictions. PolicyLink is a national research and action institute advancing racial and economic equity. PolicyLink will also provide opportunities for staff and elected officials from the seven jurisdictions to come together to learn from one another.

In addition, Challenge Grant jurisdictions select a community partner to work alongside the City and Challenge Grant Fellow. Palo Alto selected Silicon Valley at Home (SV@Home) as our community partner.

For PolicyLink to provide the City of Palo Alto with technical advice and assistance in connection with their proposal for the Challenge Grant, PolicyLink requires a (1) specific and separate written request for the technical assistance and (2) a signed jurisdiction agreement. The technical assistance letter request must come from the Legislative body responsible for passing and implementing tenant protection policies. PolicyLink requires documentation of this request in order to engage with and provide information to members of the Palo Alto City government and the public about renter protections and the preservation of unsubsidized affordable housing. PolicyLink also requests the City enter into a jurisdiction agreement that outline the terms of the Fellowship. This agreement creates clear parameters and outlines the roles and responsibilities of PolicyLink and the City.

The Partnership for the Bay's Future, led by the San Francisco Foundation, also requests the City enter into an MOU. While the City will not be directly receiving any funds through the Challenge Grant, the MOU outlines the expectations for PolicyLink, the Partnership for the Bay's Future, and the City of Palo Alto. For example, Palo Alto staff commit to participate in quarterly convenings designed to bring together the participating jurisdictions for learning and sharing. Together, the MOU and the Jurisdiction Agreement affirm the City's commitment to work collaboratively to implement renter protection policies that serve Palo Altans.

Policy Implications

The Challenge Grant Application outlined policies that should be considered to aid in the production and preservation of affordable housing in Palo Alto. Particular attention will be paid to renter protections and tenant relocation assistance, with a focus on best practices regarding enforcing these policies.

Resource Impact

The Challenge Grant does not provide any funds to the City nor does the Challenge Grant require any funds from the City. Instead, the Partnership for the Bay's Future provides funding to PolicyLink, who in turn hires and manages the Fellow. The Challenge Grant also provides a grant to the identified community partner, Silicon Valley at Home, to support their work on this project.

Timeline:

The Challenge Grant was announced on February 4, 2020, and the Fellow began working in Palo Alto on March 16, 2020. If the Council approves this item, Mayor Fine will sign the Technical Assistance Letter and return it to PolicyLink. Once the Technical Assistance Letter is returned to Policylink, the Fellow will be free to pursue the requested work in the community. A more detailed timeline is outlined in the Challenge Grant Application (Attachment E).

Stakeholder Engagement:

The Fellow will collaborate with the City and the community-based partner organization, SV@Home, to conduct a listening tour of Palo Altans. This listening tour will give the Fellow the opportunity to build relationships in the community and reach a greater understanding of the community's needs. Working with established non-profits and advocates allows the Fellow to use those established networks to build trust and support for innovative housing policy that reflects the needs and desires of the community. Specific details of the community engagement plan can be found in the Challenge Grant Application (Attachment E).

Environmental Review:

The actions recommended in this report are exempt from review under the California Environmental Quality Act (CEQA) in accordance with CEQA Guidelines Sections 15061(b)(3). The actions would initiate a planning process and are not determinative of any specific outcome. Any proposed changes to the Municipal Code resulting from the two proposed projects would be subject to CEQA public review process prior to Council adoption.

Attachments:

Attachment A: Jurisdiction Agreement

Attachment B: Memorandum of Understanding

Attachment C: Draft Technical Assistance Letter

Attachment D: Partnership for the Bay's Future FAQ

Attachment E: Challenge Grant Application

Attachment F: Palo Alto Fellow Biography

Attachment G: Partnership for the Bay's Future Challenge Grant Job Description

CITY OF PALO ALTO & POLICYLINK AGREEMENT

This Agreement, effective as of ____ day of _____, 2020, is entered by the City of Palo Alto (“Jurisdiction”) and PolicyLink, a California nonprofit public benefit corporation (“PolicyLink”). Collectively, Jurisdiction and PolicyLink are referred to as the “Parties” and individually, as a “Party”.

RECITALS

A. Jurisdiction, PolicyLink and the San Francisco Foundation (“SFF”) are entering into that certain Memorandum of Understanding of even date herewith (the “MOU”) which governs the relationship between Jurisdiction, PolicyLink and SFF with respect to the placement of a Fellow who is employed by PolicyLink to help Jurisdiction increase capacity to pass, enact or adopt meaningful Protection and Preservation Policies as well as begin implementation of said policies.

B. The terms “Fellow,” “Protection and Preservation Policies,” and all other capitalized terms used but not defined in this Agreement will have the meanings ascribed to them in the MOU.

C. The MOU contemplates this Agreement as supplemental agreement between Jurisdiction and PolicyLink to set forth their respective rights and obligations with respect to the Fellow, insurance and intellectual property rights.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, and for good and valuable consideration, the sufficiency and receipt of which are hereby acknowledged, Jurisdiction and PolicyLink hereby agree as follows:

AGREEMENT

1. **Responsibilities of PolicyLink.** PolicyLink agrees to perform the following functions with respect to the Fellow (in addition to the functions PolicyLink agrees to perform under the MOU):
 - a. Support a cohort of government leaders with the knowledge, skills, and relationships to advance racial equity in housing policy in select Bay Area jurisdictions;
 - b. Increase capacity among Bay Area local government, community organizations, and elected leaders to work collectively to advance racial equity through housing policy;
 - c. Develop a set of high-impact tenant Protection and Preservation Policies and insure adoption and implementation in participating; jurisdictions;
 - d. Develop and manage a timeline and accountability framework for implementation for each jurisdiction following the two-year fellowships;

- e. Develop set of shared state policy priorities among the participating jurisdictions;
- f. Supervision of the Fellow including:
 - i. Onboarding and orientation;
 - ii. Managing all employee documentation, benefits, time off and related human resources documentation;
 - iii. Provide all aspects of Fellow supervision including setting hours, monitoring work performance, attendance, adherence to personnel policies; investigation of complaints, administration of performance evaluations, performance improve plans and any required disciplinary action;
 - iv. Facilitate and support daily supervision efforts of the Fellow by Jurisdiction to produce project work and deliverables;
 - v. Develop shared communication protocols between PolicyLink and Jurisdiction's project team and facilitate joint assessments related to the Fellow's project work plan progress;
 - vi. Provide professional development program, with an emphasis on racial equity data analysis, policy development, community engagement, effective mediation, and communications, as well as help responding to emerging technical and adaptive needs;
 - vii. Provide ongoing coaching and mentoring support for the Fellow as he or she navigates varied political and legislative realities;
 - viii. Provide technical assistance support for the Fellow and Jurisdiction, including data-driven policy impact analysis, strategic best practices, and case studies to advance the work;
 - ix. Host monthly meetings for the Fellow and Fellows from the various jurisdictions that have been awarded Challenge Grants to provide peer learning, exposure to best practice, strategies to address identified gaps and areas of opportunity for regional and state enabling actions;
 - x. Host quarterly convenings of the Challenge Grant jurisdictions' cohort from across the region to: share critical analysis, strategy, best practices, access to relevant peer learning, and potential joint regional strategy action;
 - xi. Guide and assist in the co-development with City/County of project work plan with data driven goals and quarterly benchmarks;
 - xii. Facilitate weekly check in with the Fellow and Jurisdiction to assess progress on work plan;
 - xiii. Assist in retention issues and facilitate re-recruitment of a successor to fill any vacancy in the Fellow position if such vacancy occurs more than 90 days prior to the end of the two-year fellowship;
 - xiv. Convene Fellows from the various jurisdictions that have been awarded Challenge Grants monthly to facilitate peer learning, Fellow networking, and regional strategy. These meetings may include participation by SFF;
 - xv. Quickly resolve any issues that may arise between the Fellow and Jurisdiction;

- xvi. Maintain close collaboration with Policy Fund staff at SFF in the management of the fellowship cohort and the regional cohort meetings to ensure accomplishment of initiative results between jurisdictions, SFF, and PolicyLink:

2. Responsibilities of Jurisdiction. Jurisdiction agrees to perform the following functions (in addition to the functions Jurisdiction agrees to perform under the MOU):

- a. During the two-year fellowship, host and support the Fellow to increase jurisdictional capacity to develop, pass and begin implementation of tenant protection and affordable housing preservation policies that have been proposed by Jurisdiction in its grant application;
- b. Commit lead staff and executive team staff to support and guide the Fellow during the two-year fellowship;
- c. Identify government leaders with the knowledge, skills, and relationships to advance racial equity in housing policy within Jurisdiction's area;
- d. Submit to PolicyLink a signed letter from the elected officials responsible for requesting the technical assistance for analysis, research, and assistance in drafting policies and or legislation that will expand and protect housing rights, tenant protections, and affordable housing development and or preservation. This includes drafting policies and legislation to advance, pass, and implement progressive tenant Protection and Preservation Policies within local government (PolicyLink will provide a template);
- e. Ensure support from key staff in leadership roles to the advancement of proposed tenant Protection and Preservation Policies;
- f. Develop relationships and systems to increase capacity among department staff, community organizations, and elected leaders to work collectively to advance racial equity through housing policy;
- g. Develop a set of high-impact tenant Protection and Preservation Policies and insure adoption and implementation;
- h. Commit to continued work on policies beyond the two-year fellowship, if applicable;
 - i. Participate in timeline and accountability framework to be implemented following the two-year fellowship;
 - ii. Participate in the development of state policy priorities among the participating jurisdictions in the Challenge Grant cohort, as applicable.
- i. Attend Quarterly Challenge Grant cohort Convenings scheduled by PolicyLink;
 - i. Commit lead staff and executive team staff to participate in quarterly cohort meetings with Fellows and the various jurisdictions that have been awarded Challenge Grants;
 - ii. Commit two elected officials involved in your efforts to participate in four cohort meetings over the two-year fellowship.
- j. Commit lead staff and executive team staff to support and guide the Fellow during the two-year fellowship;

- i. Provide guidance and support (e.g. workspace, technology, and tools, as directed by PolicyLink; introductions and access to key stakeholders; orientation, etc.) to the Fellow.
 - ii. Invest in and adhere to Jurisdiction's proposed community partnership model for the duration of the fellowship;
 - iii. Support the scheduling and convening of stakeholders; and
 - iv. Contribute to research and development of education tools for electeds, stakeholders, and community partners on local landscape of affordable housing issues and dynamics; and on the development and implementation of Protection and Preservation Policies;
- b. Define, measure and share data relevant to tracking outcomes for Partnership impact.
- c. Assist in the development of project work plan with data driven goals and benchmarks.
- d. Develop tools to measure performance in terms of housing outcomes for low-income communities and communities of color.
- e. Conduct analysis of the number of low-income people and people of color who are in long-term affordable homes.
- f. Develop tools and systems for ongoing monitoring of the number of households covered by tenant protections, rent regulations, and housing preservation policies.
- g. Assist in providing information to the Fellow for weekly reports on progress and process.
- h. Assist in preparation of quarterly evaluation report.
- i. Participate in presentations as needed

2. Insurance.

PolicyLink shall obtain a policy endorsement naming Jurisdiction as an additional insured under any general liability or automobile policy or policies, as provided in the MOU.

3. Intellectual Property, Ownership and Pre-Existing Materials.

This Challenge Grant is in service of fulfilling the aims of the Partnership for the Bay's Future goal of advancing solutions to housing affordability in the region with a goal to expand and protect the housing rights of up to 175,000 households over the next five years and preserve and produce more than 8,000 homes over the next five to 10 years in San Francisco, San Mateo, Santa Clara, Alameda, and Contra Costa counties. Materials developed through this partnership are intended to support the development of regional initiatives that strengthen low-income tenant protections and preserve and expand housing and to provide technical assistance to jurisdictions that have the potential to develop affordable housing at scale (hereinafter "Work Product"). PolicyLink shall own all Work Product produced in connection with this MOU.

- a. Work Product License. PolicyLink hereby grants Jurisdiction an irrevocable, worldwide, perpetual, nonexclusive, royalty-free right and license to use,

display, transmit, distribute, edit, adapt, modify, translate, develop, and create derivative works from the Work Product (hereinafter, "Work Product License").

- b. Pre-existing Materials. In addition, PolicyLink hereby grants to Jurisdiction an irrevocable, perpetual, royalty-free, worldwide, non-exclusive license to use, copy, distribute, and display Pre-Existing Materials necessary for Jurisdiction to use in connection with the exploitation of any of the rights granted under the Work Product License, provided, however, that the foregoing license to Pre-Existing Materials shall be used solely in connection with the use of the Work Product.
- c. Restrictions. Jurisdiction understands that its use of the Work Product and Pre-Existing Materials (collectively, the "Contract IP") is for its own business purposes only. Jurisdiction may not sell, license, or distribute any Contract IP to any third-party organization or individual. In addition, Jurisdiction agrees that it will not;
 - i. Use of any Contract IP to provide outsourced consulting, technical assistance, or other services, in competition with PolicyLink. Jurisdiction agrees to reproduce and include any copyright or other proprietary rights notices of PolicyLink in all copies, in whole or in part, of the Contract IP and to take reasonable steps to ensure its distributors and third parties who have access to the Contract IP conform to the terms and conditions of this Agreement. Jurisdiction shall be liable for any breach of the restrictions of this Agreement by a third party given access to the Contract IP by Jurisdiction.

4. Miscellaneous.

This Agreement may be amended only by a writing signed by all both Parties. No waiver by either Party of any of the provisions of this Agreement shall be effective unless in writing and signed by an authorized representative of the affected Party, and only to the extent expressly provided in such written waiver. This Agreement and the MOU contain the entire understanding between the Parties with respect to the subject matter of this Agreement as of the date hereof, and all prior and contemporaneous written or oral negotiations, discussions, understandings and agreements are merged herein.

5. Assignment.

This Agreement may not be assigned by either Party without the prior written approval of the other Party.

6. Counterparts.

This Agreement may be executed in two or more counterparts, each of which shall be deemed to be an original of this Agreement, and all of which taken together shall constitute one and the same agreement.

IN WITNESS WHEREOF, the Parties have executed this Agreement through their duly authorized representatives effective as of _____, 2020.

City of Palo Alto

Approved As To Form:

City Attorney

By: _____
Name: _____
Title: _____

PolicyLink

By: _____
Name: _____
Title: _____

**CHALLENGE GRANT
MEMORANDUM OF UNDERSTANDING**

This Memorandum of Understanding (“MOU” or “Agreement”), effective as of _____, is entered by the CITY OF PALO ALTO, a chartered municipal corporation (“City” or sometimes referred to as a “Jurisdiction”), the San Francisco Foundation (“SFF”), and PolicyLink (“PolicyLink”). Collectively, the City, SFF and PolicyLink are referred to as the “Parties” and individually, as a “Party”.

I. PURPOSE OF THE MOU

This MOU sets forth the terms and understanding among the Parties and is intended to reflect the Parties’ commitment to cooperate and work together to support the Challenge Grant award Fellow, matched to City, to advance the design, adoption and implementation of tenant protection and preservation policies with City’s staff, community partners and elected officials. (Challenge Grant Vision.) This MOU will spell out areas of collaboration and expand on ownership and accountability.

- A. **Principles:** The Parties each commit to the principles that form the foundation of the Partnership for the Bay’s Future (“PBF” or the “Partnership”), which are listed here and operationalized in Section II of this MOU.
 - i. Racial justice: The Parties will work toward the shared vision of a thriving Bay Area where race is never a barrier to opportunity.
 - ii. Community engagement: The Parties will prioritize actively engaging local community members and leaders in the execution of their shared goals, with special emphasis on engaging people of color and other underserved community members.
 - iii. Results orientation: The Parties are committed to their collective impact by realizing concrete gains toward shared goals.

- B. **Deliverables:** In alignment with the application submitted by the City to SFF, the City commits to making significant good-faith efforts to achieve the following deliverables.
 - i. Design and implement improvements to housing protection and preservation programs to advance racial equity, which could involve enhancing administrative implementation of existing policies and/or adopting new or revised housing policies.
 - ii. Conduct community engagement efforts to ensure that policy proposals are well-vetted in the community and are structured to achieve their intended outcomes, especially racial equity outcomes.

II. AGREEMENT

- A. **Primary Areas of Collaboration, Roles and Operational Responsibilities:** The Parties hereby agree to create the enabling conditions necessary to realize the Challenge Grant Award vision by engaging in specific areas of collaboration and performing the respective activities to set forth in the following five category chart:
 - a. Challenge Grant Vision
 - b. Challenge Grant Award: Fellows and Community Partnerships
 - c. Challenge Grant Award: Technical Assistance + Cohort Convenings
 - d. Communication (Internal + External)

e. Evaluation

Area of Collaboration	City	PolicyLink	San Francisco Foundation	Structures for Accountability
1. CHALLENGE GRANT VISION				
<p>Parties will uphold the Policy Fund Challenge Grant goals;</p> <ul style="list-style-type: none"> > Increase racial and economic equity across the region by stemming displacement of people of color from communities across the lower 5 county Bay Area. > Deepen the practice of partnership between jurisdictions and community groups > Support the rise of new government and community leaders that can support the region’s housing and tenant protection efforts long-term > Provide models for change that inspire other jurisdictions to follow suit 	<p>Jurisdictions commit to activate and engage civic and political will to sustain the adoption and implementation of progressive tenant protection and preservation policies, in collaboration with Community Partners, through the support and facilitation of a mid-career Fellow.</p> <p>In addition, actively advance systems change with an emphasis on expanded community engagement and progressive policy.</p>	<p>Ensure a competent, racially diverse Fellows pool that is supported with technical assistance, strong onboarding and relationship building to successfully assist Challenge Grant jurisdictions in advancing tenant protection and preservation policies.</p> <p>Ensure fellows and jurisdictions land on a strong results framework to guide their work.</p> <p>Actively build a strong bench of diverse regional leaders and provide a strong technical assistance, wraparound support structure and national/regional best practices to ensure their success.</p>	<p>Ensure that the Policy Fund Challenge Grant vision and long-term expectations for the Fellowship Program and Jurisdictional Cohorts are infused with SFF’s commitment to racial and economic inclusion.</p> <p>Policy Fund will utilize its grant making, convening, organizational capacity building and the lever of the Partnership at large to support and advance the Fellows work. Policy Fund is a fund established by SFF to support initiatives to preserve and expand housing, with a strong focus on strengthening low-income tenant protections, including initiatives aimed at promoting the enactment of renter protection and affordable housing policies.</p> <p>Galvanize civic engagement related to Policy Fund broadly and Challenge Grant specifically. Build momentum for the Policy Fund through influence, expertise and flexible dollars. Engage civic leaders from advocacy orgs, academia, foundations, etc. through the Partnership.</p>	<p>Challenge Grant MOU</p>
<p><i>Operational Responsibility:</i></p>	<p><i>Provide engaged leadership and support for the Fellow in service to the goal of policy adoption and increased</i></p>	<p><i>Provide technical assistance and employer oversight for the Challenge Grant Fellows and their matched jurisdictions.</i></p>	<p><i>Generate engagement and momentum for Challenge Grants among jurisdictional leaders through regular updates and by</i></p>	

	<i>community engagement.</i>	<p><i>Elevate best practices in systems change from regional and national perspective with Fellows and Jurisdictions.</i></p> <p><i>Regularly engage, convene, update and recruit influential civic leaders and anchor institutions to support fundraising, strategy, advocacy and reflection, in partnership with SFF.</i></p> <p><i>Leverage impact cross jurisdictions, state policy change.</i></p>	<p><i>celebrating what works.</i></p> <p><i>Regularly engage, convene, update and recruit influential civic leaders and anchor institutions to support fundraising, strategy, advocacy and reflection.</i></p> <p><i>Promote the role of civic leaders as long-term promoters of equitable and progressive housing policy</i></p>	
--	------------------------------	---	---	--

Area of Collaboration	City	PolicyLink	San Francisco Foundation	Structures for Accountability
2. CHALLENGE GRANT AWARD: FELLOWS AND COMMUNITY PARTNERSHIPS				
<p>Challenge Grant jurisdictions are awarded the following for 2 years.</p> <p>Challenge Grant Fellows will facilitate the development, adoption and implementation of innovative and high-impact policies in collaborative partnership with community and staff from departments across the jurisdiction.</p> <p>Community Partnerships:</p>	<p>Challenge Grant Fellows: Fellows will be placed within jurisdictions via a matching process. Jurisdictions will be given the opportunity to interview candidates. PolicyLink has final determination over jurisdiction/fellow matches, but shall only place a fellow with the jurisdiction if the jurisdiction has approved of the fellow in advance.</p> <p>Jurisdictions are expected to provide supervision, guidance and support (e.g. workspace and tools, introductions and access to key stakeholders, orientation, etc.) to fellow, regardless of where Fellows are located.</p>	<p>Challenge Grant Fellows: POLICYLINK will hire, match and pay the Fellows, with POLICYLINK acting in the role of program manager and employer.</p> <p>In case any issues arise between the Fellow and the Jurisdiction, POLICYLINK will be the point of contact to resolve.</p> <p>POLICYLINK will assist Fellows with research and policy development technical assistance that helps them tailor and adapt strategies to address unique community conditions and will identify and bolster any gaps in Fellows development around working with data, utilizing research, etc.</p>	<p>Challenge Grant Fellows: The SFF will provide the Fellows salary package (in the form of a grant to PolicyLink) and the technical assistance pool.</p> <p>Community Partners: SFF will grant directly to the Challenge Grant jurisdiction’s Community Partner in an amount no less than \$80k.</p>	Challenge Grant MOU

<p>Jurisdictions will engage deeply with community to develop solutions that meet local needs. Jurisdiction will work with a strong community organization to serve as a lead partner in community engagement and share a strong community partnership plan.</p>	<p>In addition, jurisdiction commits lead staff and executive team staff to support and guide Fellow.</p> <p>Fellows will be required to attend monthly Fellows meetings, Quarterly cohort meetings, and other professional development and relationship building opportunities, as identified, and will be excused from work for this purpose.</p> <p>Community Partners: Jurisdictions commit to their proposed community partnership model for the duration of the grant period.</p> <p>Jurisdictions take the lead on the CG Community Partnership plans. Fellows help facilitate relationships and work.</p>	<p>POLICYLINK will Assist Fellows in assessing, in real time, the technical assistance needs that exist within their Jurisdiction teams. Using the funding pool provided by SFF, as well as through peer learning within the cohort, help Fellows secure resources to meet the technical assistance needs.</p>		
<p><i>Operational Responsibility</i></p>	<p><i>Be a good steward of Fellows during the duration of the program, providing clear direction and support, facilitating their relationships with key partners both in and outside of government.</i></p> <p><i>Actively lead on a transformative community engagement approaches with community partners.</i></p>	<p><i>Provide tailored technical assistance to fellows and their local jurisdictions, and host monthly fellows meetings, throughout the duration of the two---year fellowship program.</i></p> <p><i>Employ the Fellows as FTE's of PolicyLink and be the managing partner responsible if any issues arise with the Fellows and/or the Chosen Challenge grant jurisdictions as it relates to the Fellows and Fellowship program. Quickly resolve any issues that may arise between the fellow and their</i></p>	<p><i>Provide funding for Fellows salary packages and community partner lead grants.</i></p> <p><i>Facilitate aligned funding for community groups.</i></p>	

		hosting jurisdictions.	
--	--	------------------------	--

Area of Collaboration	City	PolicyLink	San Francisco Foundation	Structures for Accountability
3. CHALLENGE GRANT AWARD: TECHNICAL ASSISTANCE AND COHORT CONVENINGS				
<p>In addition to Fellows, Challenge Grant jurisdictions are awarded the following for 2 years:</p> <p>Technical Assistance: Challenge Grant Jurisdictions will have access to a TA pool.</p> <p>Regional Cohort: Quarterly meetings</p>	<p>Technical Assistance Pool: Technical Assistance (TA) pool is available to assist jurisdictions in filling in gaps of knowledge or tools to complete the work.</p> <p>Process: Fellows highlight jurisdiction TA needs through POLICYLINK. Fellow or POLICYLINK submits a short proposal to SFF for use of funds. SFF retains the right to fund at any amount or not at all.</p> <p>Challenge Grant Cohorts: Jurisdictions are expected to attend and actively participate in quarterly regional convenings to exchange best practices, strategies and other learnings. Attendees to include Jurisdiction staff, Fellow, lead community partner. Jurisdictions commit two elected officials participation in four cohort meetings over the two-year grant period.</p>	<p>Technical Assistance Pool: Assist Fellows to assess the technical assistance needs within their jurisdiction’s teams and use the funding pool and peer learning to address these.</p> <p>Challenge Grant Cohorts: POLICYLINK will coordinate, structure and host quarterly convenings of the Challenge Grant jurisdictions from across the region to share critical analysis and strategy recommendations, best practices, access to relevant education and advance regional strategy. Agenda setting will be done in consultation with SFF.</p> <p>Build capacity of fellows and local leaders to engage stakeholders for greater impact.</p>	<p>Technical Assistance Pool: SFF will maintain a separate Technical Assistance pool for TA requests from jurisdictions that are not covered by the POLICYLINK contract. SFF will determine TA pool requests in partnership with POLICYLINK.</p> <p>Challenge Grant Cohorts: SFF will actively participate in agenda setting for cohort meetings.</p>	<p>Challenge Grant MOU</p> <p>Meeting and Convening Calendar</p>
<i>Operational Responsibility</i>	<i>Be an active and engaged partner in all quarterly Challenge Grant cohort</i>	<i>Convene Fellowship program stakeholders for quarterly updates, knowledge sharing</i>	<i>Co-create convening agendas in partnership with PolicyLink</i>	

	<i>convenings.</i>	<i>and learning, lifting up best practices and areas of course correction.</i>		
--	--------------------	--	--	--

Area of Collaboration	City	PolicyLink	San Francisco Foundation	Structures for Accountability
4. COMMUNICATIONS				
Contribute to a strong regional communication strategy that advances and amplifies local work and leverages values-aligned opportunities.	Jurisdiction will share relevant learnings and case studies from the policy and community engagement processes for shared learning with the regional cohorts and other jurisdictions within the region.	<p>POLICYLINK will share learnings from TA providers, subject matter experts, Fellows and jurisdictions with SFF Policy Fund staff.</p> <p>For information that requires permission to distribute, POLICYLINK will acquire so that SFF can share within newsletters, etc.</p>	PBF will develop and manage a foundational strategic communications and branding plan that raises visibility, promotes fundraising, and civic and political support through knowledge sharing and storytelling.	Knowledge and material sharing will occur on a rolling basis with POLICYLINK submitting quarterly summary updates.
<i>Operational Responsibility:</i>	<i>Partners are accountable for creating/sharing communications content for Advisory Board members, funders and broad Partnership networks.</i>	<p><i>Partners are accountable for creating/sharing communications content for Advisory Board members, funders and broad Partnership networks.</i></p> <p>Support the Partnership in strategic communications, particularly around promoting civic and political support through knowledge sharing and storytelling.</p> <p>Aligning capacity of fellows, jurisdiction, and partners around strategic communications goals.</p> <p>Support fellows in advancing communications strategies, and convening city staff and resources focused on communications.</p>	<p><i>PBF will centrally manage initiative-wide strategic communications and process for supporting communications across partners.</i></p> <p><i>PBF will manage external requests for communications. POLICYLINK will forward media and communications requests to PBF/Policy Fund Initiative Officer for review and approval to proceed.</i></p>	

Area of Collaboration	City	PolicyLink	San Francisco Foundation	Structures for Accountability
5. EVALUATION				
Actively participate in evaluative learning, course correction and evidence-building.	Jurisdiction will share relevant learnings and case studies from the policy and community engagement processes for shared learning with the regional cohorts and other jurisdictions within the region.	<p>POLICYLINK will share learnings from TA providers, subject matter experts, Fellows and jurisdictions with SFF Policy Fund staff.</p> <p>For information that requires permission to distribute, POLICYLINK will acquire so that SFF can share within newsletters, etc.</p> <p>Thought partner in structuring the system for evaluation, with a particular focus on progress on results, leadership development (across stakeholder groups), policy traction, communications impact.</p>	Contract and direct the work of the evaluation partner. Manage the interaction of the evaluating partner with MOU partners.	
<i>Operational Responsibility:</i>	<i>Actively participate in evaluation efforts.</i>	<i>Actively participate in evaluation efforts and utilize evaluative learnings to impact program success.</i>	<i>Manage evaluation efforts.</i>	

B. PolicyLink as Fellow’s Employer: PolicyLink shall be the sole employer of the Challenge Grant Fellow placed by PolicyLink with the City (“Fellow”). PolicyLink shall be responsible for payment of wages and benefits, withholding of payroll and other applicable taxes, and worker’s compensation coverage for the Fellow. City shall not be a joint employer of the Fellow and the Fellow shall not have any rights to retirement benefits or other benefits accruing to City employees. The Fellow shall execute a separate agreement with City expressly waiving these claims. It is PolicyLink’s responsibility to provide written notice to the Fellow participants of the provisions of this Section. The provisions of this Section shall survive the termination or expiration of this Agreement.

While PolicyLink will make the final Fellow placement decision, City will be given an opportunity to vet Fellow candidates for placement. If circumstances cause the substitution of the Fellow for any reason, assignment of a replacement will be subject to the prior written approval of City’s designated project manager. PolicyLink, at City’s request, shall promptly remove personnel who City finds do not perform the Partnership activities in an acceptable manner, are uncooperative, or present a threat to the adequate or timely completion of the project or a threat to the safety of persons or property.

C. Cooperation: In addition to performing the activities and obligations set forth above, the Parties agree to take such other actions, and negotiate in good faith and enter such further agreements as will be necessary to consummate the transactions contemplated by this Agreement.

D. Staffing: Each Party shall provide adequate dedicated staff time to support the activities laid out in this Agreement, including:

- i. Staff person to be responsible for the day-to-day work of Challenge Grant Fellowship Program
 - a. PolicyLink: Kaki Marshall
 - b. San Francisco Foundation: TBD
 - c. Jurisdiction: Rachael Tanner, Assistant Director of Planning and Development Services; Long Range Planning Manager

- ii. High-level leader who has the authority to make decisions on behalf of the Party
 - a. PolicyLink: Kalima Rose
 - b. San Francisco Foundation: TBD
 - c. Jurisdiction: Rachael Tanner, Assistant Director of Planning and Development Services; Jonathan Lait, Director of Planning and Development Services; Edward Shikada, City Manager

- iii. Additional staff with specific expertise to participate as needed in an advisory capacity to support the ongoing initiative activities listed above.
 - a. PolicyLink: Chione Flegal, Chris Schildt
 - b. San Francisco Foundation: TBD, Rachel Benditt (Communications)
 - c. Jurisdiction: Rachael Tanner, Assistant Director of Planning and Development Services; Amy French, Chief Planning Official; Long Range Planning Manager

Each Party may change the identified staff from time to time. The Party making the change in staffing shall notify the other Parties.

III. Notices. Any notices under or in this MOU shall be in writing, and shall be deemed to be delivered when hand delivered, delivered by overnight courier, delivered by certified mail, postage prepaid, return receipt requested, or by facsimile, unless such address is changed by written notice hereunder:

If to PolicyLink: **POLICYLINK**

Attn: Michael Hassid, Chief Financial Officer
1438 Webster Street
Suite 303
Oakland, CA 94612

If to Jurisdiction:

CITY OF PALO ALTO

ATTN: Rachael Tanner

Planning and Development Services Department

250 Hamilton Avenue, 5th Floor

Palo Alto, CA 94301

If to SFF:

THE SAN FRANCISCO FOUNDATION

One Embarcadero Center, Suite 1400

San Francisco, CA 94111

Attn: Fred Blackwell

IV. Funding. Except as expressly provided in this MOU, nothing in this MOU shall obligate City, SFF or PolicyLink to expend funds or other resources, nor shall anything in this MOU be construed as a limitation on any Party's authority to contribute staff, funds or other resources to further the purposes of this MOU or in the implementation of this MOU.

V. Discretion. Each Party, including their respective employees, officials and boards, shall exercise its sole discretion over all matters relating to the Partnership and over each project or decision over which it has jurisdiction consistent with its customary practices and procedures and consistent with all legal requirements. In addition, City shall exercise its sole discretion under this MOU in a manner that is consistent with the public health and safety and shall at all times retain its respective authority to take any action that is necessary to protect the physical health and safety of the public or to comply with changes in Federal or State law, including applicable federal and state regulations. Notwithstanding any other provision of this MOU, City's governing body retains full discretion to approve or disapprove any legislative or other proposed item developed under this MOU; should City ultimately not adopt certain or any proposals developed, those discretionary decisions shall not constitute or result in a violation of this MOU.

VI. No Joint Venture or Liability. Nothing in this MOU shall be construed as creating the right or ability of one Party to bind the others and nothing in this MOU shall be construed to create any joint liability with regard to, or as a result of, the activities undertaken by any Party, their employees, officers and/or agents, to implement this MOU. All employees, officers and/or agents of each Party shall remain employees, officers and/or agents of that Party and shall be subject to the laws, procedures, rules and policies governing that Party's employees, officers and/or agents. Nothing in this MOU shall be construed as creating a partnership, joint venture, employment or agency relationship between Jurisdiction, SFF and PolicyLink. Each Party shall conduct all of its activities under this MOU in accordance with all applicable laws and regulations.

VIII. No Damages. The Parties to this MOU have determined that damages are inappropriate and that it would be extremely difficult and impractical to fix or determine the damages to a Party as a result of a breach of this MOU. The Parties would not have entered into this MOU if any of them were liable to the other or to any other Party for damages under or with respect to

this MOU. Consequently, the Parties to this MOU have agreed that no Party will be liable in damages to the other Parties or to any other Party, and each Party covenants not to sue for or claim any damages and expressly waives its right to do so, for any matter arising from or connected with any dispute, controversy, or issue regarding the application, interpretation, or effect of this MOU.

IX. Publications. No publication shall include use of the official seal of City without its prior written approval. No publication shall include use of the name and/or symbol of TSFF or PolicyLink without the prior written approval of TSFF or PolicyLink.

X. Proprietary or Confidential Information. SFF and PolicyLink each understands and acknowledges that in performing activities under this MOU, may by accident or otherwise, obtain access to proprietary or confidential information owned or controlled by Jurisdiction, the disclosure of which to third Parties may be damaging to Jurisdiction. SFF and PolicyLink each agrees that any and all such proprietary or confidential information disclosed by Jurisdiction shall be returned to Jurisdiction (if in writing) and held in confidence. SFF and PolicyLink shall exercise the same standard of care to protect such information as a reasonably prudent entity would use to protect its own proprietary or confidential data. It is further understood that Jurisdiction may, by accident or otherwise, obtain access to proprietary or confidential information owned or controlled by SFF and/or PolicyLink the disclosure of which to third Parties may be damaging to them. Jurisdiction agrees that any and all such proprietary or confidential information disclosed to Jurisdiction shall be returned to SFF and/or PolicyLink (if in writing) and held in confidence. Jurisdiction shall exercise the same standard of care to protect such information as is used by Jurisdiction with respect to its own confidential information. All confidentiality obligations hereunder shall be subject to applicable law.

XI. No Lobbying or Election Activities. No part of any funds provided under this MOU (including the monetary grants from SFF to PolicyLink or to the community lead) may be used may be used: (1) to attempt to influence legislation, carry on propaganda or otherwise carry out lobbying activities within the meaning of Section 4945(e) of the Internal Revenue Code, or (2) to influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive.

XII. Conflict of Interest. Each Party acknowledges that it is familiar with Section 1090 et seq. of the Government Code of the State of California and any locally applicable laws, regulations, or policies, and certifies that it does not know of any facts which constitutes a violation of said provisions and agrees that it will immediately notify the other if it becomes aware of any such fact during the term of this MOU.

XIII. Nondiscrimination. In the performance of its Partnership activities, SFF and PolicyLink each agrees not to discriminate in the employment of any person due to that person's race, skin color, gender, gender identity, age, religion, disability, national origin, ancestry, sexual orientation, pregnancy, genetic information or condition, housing status, marital status, familial status, weight or height of such person.

XV. Indemnification.

- A. Each Party will indemnify, defend and hold harmless the other Party or Parties, and their respective officers, employees and agents from and against any and all third party loss, liability, expense (including reasonable attorneys' fees) or claims for injury or other damages (collectively "Claims") arising out of the indemnifying party's performance of this Agreement, but only in proportion to and to the extent such Claims are caused by or result from the negligent or intentional acts or omissions of the indemnifying party.
- B. In the event of concurrent negligence of two or more of the Parties, or the Parties' respective officers, employees or agents, the liability for any and all Claims shall be apportioned under the California theory of comparative negligence as presently established or as may hereafter be modified. Nothing in this Agreement shall constitute a waiver or limitation of any rights that the indemnifying party may have under applicable law in the event of concurrent negligence of persons or entities other than the parties to this Agreement.
- C. Notwithstanding any other provision of this MOU, PolicyLink will indemnify, defend and hold harmless City and its respective officers, employees and agents from and against any and all claims, liability, or expense (including reasonable attorneys' fees) arising out of or related to the hiring and Fellow selection process .
- D. The Parties intend and agree to cooperate with each other in the investigation and disposition of third-party liability claims arising out of the performance of this Agreement. Such cooperation may include joint investigation, defense and disposition of claims. The Parties agree to promptly inform one another whenever an incident report, claim or complaint is filed or when an investigation is initiated concerning any service performed under this Agreement. In the event of a conflict in interest, each Party may conduct its own investigation and engage its own counsel.
- E. The provisions of this Section shall survive the termination or expiration of this Agreement.

XVI. Insurance. PolicyLink shall procure and maintain during the full term of the Agreement the insurance coverage described in Exhibit A hereto. PolicyLink shall obtain a policy endorsement naming City as an additional insured under any general liability or automobile policy or policies.

All insurance required hereunder shall be provided through carriers with AM Best's Key Rating Guide ratings of A-:VII or higher which are licensed or authorized to transact insurance business in the State of California.

Certificates evidencing such insurance shall be filed with City concurrently with the execution of this Agreement. The certificates will be subject to the approval of City's Risk Manager and will contain an endorsement stating that the insurance is primary coverage and will not be canceled, or materially reduced in coverage or limits, by the insurer except after filing with the City's Risk Manager thirty (30) days' prior written notice of the cancellation or modification. If the insurer cancels or modifies the insurance and provides less than thirty (30) days' notice to PolicyLink, PolicyLink shall provide the Risk Manager written notice of the cancellation or modification within two (2) business days of PolicyLink's receipt of such notice. PolicyLink shall be responsible for ensuring that current certificates evidencing the insurance are provided to City's Risk Manager during the entire term of this Agreement.

The procuring of such required policy or policies of insurance will not be construed to limit PolicyLink's liability hereunder nor to fulfill the indemnification provisions of this Agreement.

XVI. Miscellaneous.

- A. This MOU will be governed by the laws of the State of California.
- B. This document represents the entire and integrated agreement between the Parties with respect to the subject matter hereof and supersedes all prior negotiations, representations, and contracts, either written or oral . This document may be amended only by a written instrument, which is signed by the Parties.
- C. No waiver by any Party of any of the provisions of this MOU shall be effective unless in writing and signed by an authorized representative of the waiving Party, and only to the extent expressly provided in such written waiver.
- D. The covenants, terms, conditions, and provisions of this MOU will apply to, and will bind, the heirs, successors, executors, administrators, permitted assignees, and consultants of the Parties.
- E. All transactions described herein are subject to and must be conducted in accordance with the applicable requirements of the Jurisdiction's Charter and Municipal Code.
- F. The individuals executing this MOU represent and warrant that they have the legal capacity and authority to do so on behalf of their respective legal entities.

XVII. Assignment. This MOU may not be assigned by any party without the prior written approval of the other Parties.

XVIII. Effective Date and Termination. This MOU will be effective through February 2022 from the date first written, but may be terminated by any of SFF, PolicyLink or the Jurisdiction for any reason, without cause, with 90 days advance written notice, or with cause, with 10 days written notice. Upon the termination of this MOU, all obligations and rights of the Parties shall cease and be of no further force or effect, provided, however, those rights and obligations that by their nature are intended to survive the termination of this MOU shall so survive. Without limiting the generality of the foregoing clause: (1) POLICYLINK shall have the right to remove the Fellow from Jurisdiction's facilities as soon as practicable after the termination date, (2) SFF shall have the right to cease any outstanding grants to the Community Lead and any outstanding financial support for access to the technical assistance pool, and (3) the Parties will have the right to use any and all information and data developed or obtained as a result of this MOU in furtherance of the goals of the PBF, except where such information or data constitute the proprietary or confidential information of either of the other Parties.

XIX. Counterparts. This MOU may be executed in two or more counterparts, each of which shall be deemed to be an original of this MOU, and all of which taken together shall constitute one and the same agreement

Accepted and Agreed:

JURISDICTION

By: _____

Name: _____

Title: _____

POLICYLINK

By: _____

Name: _____

Title: _____

THE SAN FRANCISCO FOUNDATION

By: _____

Name: _____

Title: _____

Exhibit A

INSURANCE REQUIREMENTS

CONTRACTORS TO THE CITY OF PALO ALTO (CITY), AT THEIR SOLE EXPENSE, SHALL FOR THE TERM OF THE CONTRACT OBTAIN AND MAINTAIN INSURANCE IN THE AMOUNTS FOR THE COVERAGE SPECIFIED BELOW, **AFFORDED BY COMPANIES WITH AM BEST'S KEY RATING OF A-VII, OR HIGHER, AUTHORIZED TO TRANSACT INSURANCE BUSINESS IN THE STATE OF CALIFORNIA.**

AWARD IS CONTINGENT ON COMPLIANCE WITH CITY'S INSURANCE REQUIREMENTS, AS SPECIFIED, BELOW:

REQUIRED	TYPE OF COVERAGE	REQUIREMENT	MINIMUM LIMITS	
			EACH OCCURRENCE	AGGREGATE
YES YES	WORKER'S COMPENSATION EMPLOYER'S LIABILITY	STATUTORY STATUTORY		
YES	GENERAL LIABILITY, INCLUDING PERSONAL INJURY, BROAD FORM PROPERTY DAMAGE BLANKET CONTRACTUAL, AND FIRE LEGAL LIABILITY	BODILY INJURY	\$2,000,000	\$2,000,000
		PROPERTY DAMAGE	\$2,000,000	\$2,000,000
		BODILY INJURY & PROPERTY DAMAGE COMBINED.	\$2,000,000	\$2,000,000
YES	AUTOMOBILE LIABILITY, INCLUDING ALL OWNED, HIRED, NON-OWNED	BODILY INJURY	\$1,000,000	\$1,000,000
		- EACH PERSON	\$1,000,000	\$1,000,000
		- EACH OCCURRENCE	\$1,000,000	\$1,000,000
		PROPERTY DAMAGE	\$1,000,000	\$1,000,000
		BODILY INJURY AND PROPERTY DAMAGE, COMBINED	\$1,000,000	\$1,000,000
<p>YES THE CITY OF PALO ALTO IS TO BE NAMED AS AN ADDITIONAL INSURED: CONTRACTOR, AT ITS SOLE COST AND EXPENSE, SHALL OBTAIN AND MAINTAIN, IN FULL FORCE AND EFFECT THROUGHOUT THE ENTIRE TERM OF ANY CONSULTANT AGREEMENT, THE INSURANCE COVERAGE HEREIN DESCRIBED, INSURING NOT ONLY CONTRACTOR AND ITS SUBCONTRACTORS, IF ANY, BUT ALSO, WITH THE EXCEPTION OF WORKERS' COMPENSATION, EMPLOYER'S LIABILITY AND PROFESSIONAL INSURANCE, NAMING AS ADDITIONAL INSUREDS CITY, ITS COUNCIL MEMBERS, OFFICERS, AGENTS, AND EMPLOYEES.</p>				

I. INSURANCE COVERAGE MUST INCLUDE:

- A. A CONTRACTUAL LIABILITY ENDORSEMENT PROVIDING INSURANCE COVERAGE FOR CONTRACTOR'S AGREEMENT TO INDEMNIFY CITY.**

ii. **CONTRACTOR MUST SUBMIT CERTIFICATES(S) OF INSURANCE EVIDENCING REQUIRED COVERAGE AT THE FOLLOWING URL:**
<https://www.planetbids.com/portal/portal.cfm?CompanyID=25569>

iii. **ENDORSEMENT PROVISIONS, WITH RESPECT TO THE INSURANCE AFFORDED TO “ADDITIONAL INSUREDS”**

A. PRIMARY COVERAGE

WITH RESPECT TO CLAIMS ARISING OUT OF THE OPERATIONS OF THE NAMED INSURED, INSURANCE AS AFFORDED BY THIS POLICY IS PRIMARY AND IS NOT ADDITIONAL TO OR CONTRIBUTING WITH ANY OTHER INSURANCE CARRIED BY OR FOR THE BENEFIT OF THE ADDITIONAL INSUREDS.

B. CROSS LIABILITY

THE NAMING OF MORE THAN ONE PERSON, FIRM, OR CORPORATION AS INSUREDS UNDER THE POLICY SHALL NOT, FOR THAT REASON ALONE, EXTINGUISH ANY RIGHTS OF THE INSURED AGAINST ANOTHER, BUT THIS ENDORSEMENT, AND THE NAMING OF MULTIPLE INSUREDS, SHALL NOT INCREASE THE TOTAL LIABILITY OF THE COMPANY UNDER THIS POLICY.

C. NOTICE OF CANCELLATION

- 1. IF THE POLICY IS CANCELED BEFORE ITS EXPIRATION DATE FOR ANY REASON OTHER THAN THE NON-PAYMENT OF PREMIUM, THE CONTRACTOR SHALL PROVIDE CITY AT LEAST A THIRTY (30) DAY WRITTEN NOTICE BEFORE THE EFFECTIVE DATE OF CANCELLATION.**
- 2. IF THE POLICY IS CANCELED BEFORE ITS EXPIRATION DATE FOR THE NON-PAYMENT OF PREMIUM, THE CONTRACTOR SHALL PROVIDE CITY AT LEAST A TEN (10) DAY WRITTEN NOTICE BEFORE THE EFFECTIVE DATE OF CANCELLATION.**

Vendors are required to file their evidence of insurance and any other related notices with the City of Palo Alto at the following URL:

<https://www.planetbids.com/portal/portal.cfm?CompanyID=25569>

OR

http://www.cityofpaloalto.org/gov/depts/asd/planet_bids_how_to.asp



March 1, 2020

Adrian Fine, Mayor
City of Palo Alto
250 Hamilton Avenue
Palo Alto, CA 94301

Dear Mayor Fine:

Thank you for your interest in having PolicyLink provide the Mayor of Palo Alto with technical advice and assistance in connection with the Mayor and City Council of Palo Alto's efforts to educate and engage members of the Palo Alto City Government, and the public about renter protections and the preservation of unsubsidized affordable housing. In order to comply with Internal Revenue Service rules (Reg. Sec. 53.4945-2(d)(2)), PolicyLink would like to have your request in writing, in advance, in the name and on behalf of the Mayor of Palo Alto.

The sample letter enclosed will suit our needs to protect our Section 501(c)(3) tax-exempt status and ensure our compliance with the terms of our foundation grants.

Upon receiving the letter, we will be happy to use our resources to assist the Select Committee as you have requested.

Very truly yours,

Michael J. Hassid, Chief Financial Officer
PolicyLink

DRAFT – IF APPROVED, WILL BE PLACED ON CITY OF PALO ALTO LETTERHEAD

March 24, 2020

PolicyLink

Attn: Michael J. Hassid, Chief Financial Officer
1438 Webster Street, Suite 303
Oakland, California 94612-3228

Dear Mr. Hassid:

By means of this letter, the Mayor of Palo Alto, on behalf of the City Council of Palo Alto, officially requests technical advice and assistance from PolicyLink in connection with the ongoing implementation of its legislation to protect renters and preserve unsubsidized affordable housing. Specifically, I request PolicyLink's advice and assistance with respect to reviewing, analyzing, and adjusting the current renter protection ordinance and assessing comparable ordinances, policies, and programs in the San Francisco Bay Area for applicability in Palo Alto. This includes evaluating policies such as—but not limited to—reasonable relocation assistance, protection from sizable rental increases, policies to prevent displacement of residents from their homes, or eviction without just cause, while protecting the fair rights of property owners; strengthening enforcement measures to ensure compliance with penalties for violations of Palo Alto's existing requirement to offer an annual lease to tenants; and for providing assistance in drafting ordinances and policies to respond to COVID-19 emergency circumstances, including recovery from COVID-19. Overall, we seek PolicyLink's assistance in understanding advisable means to protect the renters within our community while balancing the rights of property owners.

We are interested not only in the factual information that you can provide to us, but also in your organization's professional analysis and recommendations related to these subjects. Although your submissions may be directed to the City Council, we may also request that you distribute it to other specified government officials or assist in distributing it to the general public.

The Mayor of Palo Alto and City Council understands that in order to comply fully with this request, your organization may need to work on drafting legislation or legislative provisions, research public opinions, and engage in communications with stakeholders, policymakers, and allied groups.

We look forward to receiving your input throughout the duration of the City of Palo Alto's work to implement its renter protections and affordable housing preservation, as well as any necessary assistance with emergency responses. Thank you in advance for your organization's valuable contribution to the work of the City of Palo Alto.

Very truly yours,

Mayor Adrian Fine
City of Palo Alto



Q: What makes this Partnership different from similar efforts to solve the affordable housing crisis?

The [Partnership for the Bay's Future](#) is the first of its kind in California because it consists of philanthropic, faith, government, business, and community leaders all working toward a shared vision: to address the affordable housing crisis. The public-private Partnership, and its [investment and policy funds](#), aims to expand and protect the housing stability of up to 175,000 households over the next five years and preserve and produce more than 8,000 homes over the next five to 10 years.

The Partnership is unique, in part, because of its focus on the “3Ps”—Protection, Preservation, and Production—and, because it achieves results both through investments and policy change. No other effort has the dual focus, recognizing that both investments and policy change are needed and that having both will deliver added leverage and impact.

The Bay's Future Fund, our affordable housing investment fund, will offer flexible capital to invest directly in affordable, mixed, and middle-income housing projects. The country's first-ever regional housing Policy Fund will support initiatives to preserve and expand housing, with an emphasis on strengthening low-income tenant protections.

Q: How much has each organization committed?

[Our Partners](#) have already secured initial funding of more than \$260 million for an intended \$500 million Bay's Future Fund. The Policy Fund has secured almost \$20 million of an intended goal of \$40 million. The Partnership will continue to engage new Partners and funders. Please [contact us](#) for more information or if your organization is interested in becoming a Partner.

Q: How does this connect to efforts to alleviate homelessness?

We share a commitment to alleviating homelessness and are engaged in conversations about how to best integrate the work happening across the region into this Partnership. We are excited about the Bay Area's emerging commitment to addressing housing and homelessness—and efforts to bring the two issues together, wherever possible.

The Partnership is launching with investment opportunities that would add to these programs, including:

- The Bay's Future Fund's Supportive Housing Investment Product: High loan-to-value Supportive Housing Loans for acquisition and predevelopment costs will allow experienced developers to accelerate the development process and get more people experiencing homelessness into homes significantly faster than would otherwise be possible.
- The Policy Fund's focus on protection policies: These support efforts to protect tenants, stem the tide of displacement, while preserving and producing housing.

We also recognize that interventions that more directly target the causes of and solutions to homelessness are needed, and the Partnership looks forward to working to more fully address the issue of homelessness in the future.

Q: How will the Partnership measure progress?

Today, [two full-time workers, making \\$15 per hour—over \\$62k per year—can only afford to live in 5% of the Bay Area's neighborhoods](#). Our goal is to change this and make the Bay Area a thriving place for more residents. The Partnership will measure progress by the number of homes created, the number of tenants protected, and the shifting percentage of neighborhoods that are affordable to most full-time workers.

Ultimately, we aim to expand and protect the housing rights of up to 175,000 households over the next five years and preserve and produce more than 8,000 homes over the next five to 10 years.

Q: How will the Partnership ensure the community is engaged and has a say?

This was important to us from the beginning. This Partnership was developed through years of conversations with community and faith leaders, housing experts, elected officials, and residents. As our Partnership expands, our programs will evolve to ensure this Partnership remains broad and inclusive—representing all groups of people that make the Bay Area great.

Additionally, the Partnership will rely upon a diverse Advisory Board, which includes investors from the philanthropic and corporate sectors, public sector and policy experts, and community leaders to inform the work and ensure it is grounded in the best interests of the community. The Partnership will evolve based on input from experts, advocates, and community members.

Q: How did this project originate, and what role has the community played?

The Partnership's goal is to be additive and supportive of existing efforts underway. Its creation involved community conversations, in which we listened to the people affected by the housing crisis and gained a deeper understanding of the most effective ways to address their challenges. We also engaged a wide range of faith leaders and community and housing advocates to shape our approach to protecting tenant rights and promoting housing stability, while preserving and producing more affordable homes.

Q: How does this relate to the recently passed homeless tax on San Francisco businesses?

This Partnership is a separate effort spearheaded by the community, businesses, philanthropy, and housing advocates to help protect residents and create affordable housing in a comprehensive way. We also are focused on policy, because we know that just building more housing will not solve the issue.

Q: How will the Partnership make sure that large and small community developers will be able to benefit from available products and funds?

The Partnership's Bay's Future Fund will engage mission-aligned developers of all sizes. Several products have been designed for smaller developers who have historically faced barriers to accessing capital. As the Partnership grows, we will actively seek and incorporate community feedback to ensure we are promoting equitable, diverse solutions to the housing crisis.

Q: Can you speak to the role of tech companies in this crisis?

While not the root cause of the affordable housing crisis, the growth of tech companies has put pressure on a broken system. The current shortage of affordable housing has been created by a lack of protections for tenants, preservation of existing affordable housing and investment in new affordable units, as well as by a strong regional economy that has outgrown existing government policies and funding. Our Partners are focused on a combination of solutions that we hope will solve the crisis in the long-term. Tech companies are starting to build housing and support efforts to make housing more affordable. We are grateful to Facebook and Genentech, who have already invested in the Partnership, and look forward to other tech leaders joining in the future. We need tech companies and businesses to be involved in promoting long-term solutions, but they aren't the only partners we need. To truly advance our goals, we need all businesses and groups at the table—working together.

Q: How will you address the environmental implications of additional, affordable housing?

The Partnership is working with community partners—including environmental advocates and stakeholders—to create solutions that positively impact the environment, in addition to helping residents. Every development will be evaluated and implemented in a way that addresses environmental and community concerns.

Q: Why aren't other funders in this space included?

We are in conversation with a number of additional funders, with the hope that they will join the effort and contribute to the Bay's Future and Policy Funds. We need all voices and investors at the table, and look forward to expanding our reach to support more residents.

Q: What kinds of policies will the Policy Fund support?

The Policy Fund will support local jurisdictions in passing and implementing policies that will protect tenants and preserve and produce housing. The Fund will use the policies vetted in the [CASA \(Committee to House the Bay Area\)](#) process as a menu of possibilities for jurisdictions to propose in their applications for funding. The Fund's first effort will be Challenge Grants, which will be focused on strengthening tenant protections, and the preservation of affordable housing. For instance, the Fund would support jurisdictions in passing and implementing tenant protections such as just cause eviction, rental assistance, and tenant representation policies.

Q: Does the Partnership support the CASA (Committee to House the Bay Area) Compact recommendations?

We believe that in order to promote a thriving Bay Area for all, we need to invest in the production and preservation of affordable housing, as well as policies that protect tenants. To get there, our goal is for the Partnership's efforts to complement the great work that community and faith leaders and housing advocates have already been leading for decades. One of our efforts is a Policy Fund that will support local jurisdictions in passing and implementing policies to protect tenants and preserve and produce housing. This Fund will use the policies vetted in [the CASA process](#) as a menu of possibilities for jurisdictions to propose in their applications for funding.

Q: Why did you focus only on 5 of the counties in the Bay Area?

This is meant to be a starting point—we want to be sure we're being ambitious, but also focusing on a smaller number of counties, given the deep relationships and capacity needed to implement the funds effectively. By targeting resources to these 5 counties (Santa Clara, San Mateo, San Francisco, Alameda and Contra Costa), we hope to jumpstart high-impact projects and policies that could have positive impacts throughout the region, and have the potential to expand to additional counties in future years.

[HOME](#) [ABOUT US](#) [THE OPPORTUNITY](#) [CONNECT WITH US](#) [NEWS](#)

Challenge Grant Summary Sheet

Jurisdiction: Palo Alto

Team Members: Main contact - Hang Huynh, Senior Planner, Planning and Development Services Dept.

Fellow supervisor - Elena Lee, Planning Manager, Planning and Development Services Dept.

Director and Assistant Director, Planning and Development Services Dept. (no names)

Silicon Valley at Home (no name and title)

Proposed Protection and Preservation policies:

- Adjust the current renter protection ordinance
- Review existing renter protection ordinance and comparable ordinances in the San Francisco Bay Area
- Evaluate reasonable relocation assistance to be provided for tenants of properties with 5 or more units displaced due to a change of use, sizeable rental increases, or eviction without just cause, while protecting the fair rights of property owners
- Strengthen enforcement measures to ensure compliance with penalties for violations of Palo Alto's existing requirement to offer an annual lease to tenants

Racial + Economic Equity Lens: The population of Palo Alto is 63% Caucasian, 27% Asian/Asian-American, 5% Latino, and 2.5% reported being a household of two or more races. 72% of Latino/Hispanic households are renters, just under 60% of mixed-race households are renters, and 69% of the small African/African-American population are renters. While the majority of renters are white, and the majority of low-and moderate-income tenants are also white, non-Asian people of color are far more likely to be renters in Palo Alto.

The targeted community engagement strategy is to reach the communities that are most affected by tenant protections. With the Challenge Grant Fellow, and translator when needed, the plan is to engage smaller, focused groups, including with communities of color, to learn about their experiences as tenants. The smaller, focused groups will allow direct dialogue between tenants and the project team in a supportive environment that is less intimidating than large public forums.

Political Context: Due to limitations in staff time, specifically the Planning and Development Services Department which is experiencing a 33% vacancy, the City has not been able to advance the issue of renter protection policies in a robust manner.

The need for renters' protection became a priority for the City Council in 2018 when a property owner proposed to convert an existing apartment complex to a hotel. Two months after tenants received eviction notices, City Council passed an emergency ordinance requiring landlords of buildings of 50 units or more to provide relocation assistance to no-fault evicted tenants, as well as passed new tenant protection policies.

Previously, the City Council have taken up issues related to tenant protections, which were contentious and divisive. However, after the above-mentioned apartment conversion situation developed, the dialogue shifted with a desire to be more proactive. The real lives impacted by the eviction notices touched the hearts of many in the community and created space for a renewed conversation about how

to ensure Palo Alto remains a desirable community with a high quality of life that is inclusive of low- and moderate-income residents.

The City has very engaged and educated residents, who demand a significant amount of data and information. If changes are proposed, extensive community engagement is needed to build support.

The Palo Alto community has preserved single family homes and has not developed a large amount of multi-family or affordable housing. Recently, the City Council has adopted or modified ordinances to encourage housing production. They approved 59 units of affordable housing, the first fully affordable development in eight years. In addition, City Council recently adopted a package of policies to facilitate the development of multifamily housing; however, rising construction costs have delayed construction.

Community Partnership Plan: Silicon Valley at Home (SV@Home) will be the lead community partner. SV@Home has been the voice for affordable housing in the Silicon Valley advocating for policies, programs, land use, and funding. The organization has worked at a regional scale by engaging local jurisdictions' staff, providing technical support, and facilitating conversations. SV@Home would assist with 1) understanding the problem through focused outreach, and qualitative and quantitative data analysis, 2) identifying and refining solutions in order to develop a policy package for Palo Alto, and 3) presenting the policy package to both the City Council and the public for discussion and action.

Jurisdiction Contributions: This effort will be supported by a range of experienced planning staff, including the manager of the Long-Range Planning Team and the senior housing planner. Staff will also be supported by the Planning and Development Services Department Director and Assistant Director. To show the commitment to the community engagement, the City's management staff will be deeply involved in the community conversation throughout the process, providing an additional link between the City Council and the stakeholder groups.

Endorsement Letters: Mayor Eric Filseth, Vice Mayor Adrian Fine, Councilmember Kniss (seven councilmembers total includes Mayor and Vice Mayor), and Silicon Valley a

I. BASIC INFORMATION

Name of City:	Palo Alto
Name of Submitting:	City of Palo Alto
Name of Staff Contact Person:	Hang Huynh
Title:	Senior Planner
City Department:	Planning and Development Services
Email:	Hang.Huynh@cityofpaloalto.org
Phone Number:	(650) 329-2493
Name of Person Providing Direct Supervision to Fellow:	Elena Lee
Title:	Planning Manager
City Department:	Planning and Development Services
Email:	Elena.lee@cityofpaloalto.org
Phone Number:	(650) 617-3196
Address:	Palo Alto

II. VISION, POLICY PRIORITIES & IMPACT

We will look for the following within your answer:

- Provide a clear and concise statement of the problem you seek to address, include data to provide additional context on the nature and extent of this challenge.
- Description of whether your proposal focuses on tenant protections, or a combination of tenant protections and preservation of existing affordable housing and how you intend to use the fellow to achieve your outcomes.
- Please describe the innovative or groundbreaking change you would like to see in the next 2-5 years and how that change impacts vulnerable tenants (and existing affordable housing) in your city.
- The local economic, political and social conditions that are driving that vision.
- The package of policy changes you are proposing. Please describe why have you chosen to advance these particular policies and whether they are part of a new or continuing effort. For this section, please refer to the Policy Fund's list of recommended policies in the Appendix (See the full RFP document for reference). Please note: Jurisdictions that have already enacted some of the listed policies are encouraged to apply and will be considered as competitive as jurisdictions with no protections.

The City of Palo Alto seeks to address the vulnerabilities that renters face, especially low- and moderate-income renters, by developing policies that provide renters with protections. Through renter protection measures, Palo Alto can increase stability for renters and can ensure that Palo Alto remains a sustainable community where households of all incomes and occupations thrive.

The need for renters' protection became a priority for the City Council in 2018 when a property owner proposed to convert an existing apartment complex to a hotel. Originally known as the Hotel President in 1929, the President Hotel was converted from a hotel to a 75-unit apartment complex in 1968. The President Hotel provided apartments for relatively lower rents, between \$1,200 to \$2,400, for over 50 years. The rent was comparable to deed-restricted rents for very-

low and low rentals. The new owners, intending to convert the building back to a hotel use, issued eviction notices to vacate in June 2018. Two months after tenants received eviction notices, City Council passed an emergency ordinance requiring landlords of buildings of 50 units or more to provide relocation assistance to no-fault evicted tenants. However, to date, the relocation assistance provided a temporary monetary relief but all tenants at the President Hotel ultimately were evicted and have relocated.

With limited policies of tenant protections, the emergency ordinance was a direct reaction to the City Council's concern about the lack of tenant protections for the President Hotel residents. The President Hotel evictions highlighted for the City Council the need for proactive tenant protections.

The entire Bay Area faces a shortage of housing, especially affordable housing. The limited supply of housing coupled with a rise in high wage earners has led to extremely high rents, congested roads, increasing levels of homelessness, and an exodus of many of our city's diverse residents. Many of those who serve the community and play critical roles in the local economy and high quality of life—from cooks and artists to teachers and firefighters—cannot live in or near Palo Alto. A common example are business owners facing shutdowns of their businesses due to difficulty hiring and retaining service workers who are often renters of the community. Most recently, Prolific Oven, a bakery that has been with the City for 39 years, has announced it is closing at the end of September 2019 due to the high cost of doing business. One of the cited reasons was the difficulty to retain workers due in part to the high cost of housing.

Though Palo Alto has a population of only 66,000 residents, the population swells to 130,000 during day time working hours (City of Palo Alto FY 2018 Comprehensive Annual Financial Report (CAFR)). This dramatic three-fold increase is due to the high number of jobs located in the city. In addition, many jobs in Palo Alto are high-wage jobs in the technology, medical, and education fields. The high number of high-wage jobs contributes to intense competition for the limited housing supply in the city and means that landlords have their pick of tenants. Renters with higher incomes are able to secure housing more easily than lower-income households.

In August 2019, the median rent for a two-bedroom apartment in Palo Alto was \$4,500 . To comfortably afford this, a family of two would need to earn at least \$180,000 annually (https://www.trulia.com/real_estate/Palo_Alto-California/market-trends/). Still, according to the 2017 American Community Survey, renter households make up 45% of the households in Palo Alto. Given the high rents, it's unsurprising that 40% of renter households are cost-burdened. Cost-burdened households pay more than 30% of income to housing, leaving a limited amount of income available for transportation, food, medical care, education, and other needs.

The Palo Alto community has preserved single family homes and has not developed a large amount of multi-family or affordable housing. Since 1973, there are 2,192 affordable rentals, below market rate rentals, or below market rate ownership units built in the city, or approximately 8%. Of these 84% are designated for low to moderate income households.

City Council has passed policies designed to address the supply-side of the housing crisis. Just a few months ago, the City approved 59 units of affordable housing, the first fully affordable development in eight years. In addition, City Council recently adopted a package of policies designed to facilitate the development of housing, however rising construction costs have delayed the construction of entitled multifamily housing, thus prolonging its realization.

In the context of limited housing supply, a large number of high-wage jobs, and the vulnerability of renters, the City of Palo Alto aims to focus efforts on renter protection. By protecting renters, the City can help provide stability, retain the income-diversity that remains, and support stability of future renters as well.

The City Council and broader community acknowledges the housing challenges our residents face and have initiated action to address these issues. In September 2018, the City Council discussed a host of renter protection policies. The Council directed staff to explore policies including:

- Direct staff to return to Council with specific proposals to adjust the current renter protection ordinance;
- Review of existing renter protection Ordinance and comparable ordinances in San Francisco Bay Area;
- Evaluate reasonable relocation assistance to be provided for tenants of properties with 5 or more units displaced due to change of use, sizeable rental increases, or eviction without just cause, while protecting the fair rights of property owners;
- Strengthen enforcement measures to ensure compliance with penalties for violations of Palo Alto's existing requirement to offer an annual lease to tenants;
- Consider other updates to existing renter protections and mediation program as needed to continue a healthy and diverse community; and
- Discuss the full range of renter protections. Discussion topics to include just cause evictions and rent stabilization among other protections.

Due to limitations in staff time (specifically the Planning and Development Services Department experience 33% vacancy in full-time positions), the City has not been able to advance this issue in a robust manner. While the community acknowledges affordable housing is a pressing matter that must be addressed, building community consensus requires time for thoughtful discussion and deliberation buttressed by research. The City has been unable to pursue renter protection policies in this manner.

With the support of our community partner, Silicon Valley at Home (SV@Home) and the Challenge Grant Fellow, the City proposes to (1) understand the problem through focused outreach, qualitative and quantitative data analysis, (2) identify and refine solutions in order to develop a policy package for Palo Alto, and (3) present the policy package to both the City Council and the public for discussion and action. The City Council's 2018 action and list of associated policies are a starting place for this project; yet we move forward understanding that policies may be added, and others discarded as ineffective for Palo Alto.

The City of Palo Alto believes that through this approach, a successful set of policies can be advanced that provide protection and stability for renters throughout the city. In the medium term, 2-5 years, we expect to see the policies implemented and helping retain low, moderate, and middle-income households.

We also believe that our approach to community engagement can serve as a model for nearby communities that are similar to Palo Alto. The engagement will develop community support and buy-in to solutions. The community support will maximize the likelihood renter's policies be supported and adopted by City Council.

If funded, the City of Palo Alto can be a model for policy change for smaller to medium cities in the Bay Area. Palo Alto's demographics, building form and development pattern, policies, and jobs/housing imbalance are representative of the 15 other cities in Santa Clara County. If change is to occur in the region, realistic change needs to occur at a smaller scale of a peer city so that neighboring cities will consider replication and adoption. Palo Alto can model a proven framework and process other cities can use.

Given the diverse ideas to address renter protections, the process for policy change is estimated to be carried out in phases over the two years of the Challenge Grant.

The City's role as primarily a regulatory body can support tenant protection issues through policy. With the direction from City Council's Memo in 2018, the approach above will be an extension of efforts already underway.

III. SOCIAL, RACIAL & ECONOMIC EQUITY

Please describe how your proposal will intentionally improve social, racial and economic equity in your city, including the following:

- *Identify the vulnerable low-income residents and communities of color that your policy plan will impact. Please include data that breaks down impacted populations by race and income.*
- *Describe the approach you will use to meet the needs of these populations.*
- *Outline the specific impact you anticipate that the passage of your proposed policies will have on these communities.*

Santa Clara County is the most populous county in the Bay Area with a current median income estimated at over \$125,000. As incomes continue to rise at the high end, lower income households struggle to hold on. Santa Clara County has a very high-income inequality ratio of 16.4 according to the Public Policy Institute of California, meaning high-income families have 16 times more income than low-income families (<https://uwba.org/wp-content/uploads/2017/10/SantaClara-Snapshot.pdf>). While this highlights the economic polarization of the County, it also reveals its economic diversity. Although Palo Alto is one of the more affluent cities in the County, low income families make up 28% of the population of City. The renter population in Palo Alto is also economically diverse, but fully 50% of them are

low and moderate-income households with incomes below \$100,000 (American Community Survey, 5-Year Estimates, B25003 (A-I)).

In 2017, the population of Palo Alto was 63% Caucasian, 27% Asian/Asian-American, 5% Latino, and 2.5% reported being a household of two or more races. Renters make up 45% of the households in Palo Alto, and over 60% of renter households are classified as Caucasian, or non-Hispanic white by the census. However, 72% of Latino/Hispanic households are renters, just under 60% of mixed-race households are renters, and 69% of the small African/African-American population are renters. Thus, while the majority of renters are white, and the majority of low-and moderate-income tenants are also white, non-Asian people of color are far more likely to be renters in Palo Alto (American Community Survey, 5-Year Estimates, B25003 (A-I)). Because renters are more likely to have lower incomes than homeowners, they experience the most vulnerability in an unstable, high-priced market, and are unfortunately not as well represented in the policy making process. The focus of this effort is to engage the full diversity of the population in the process.

The Challenge Grant will allow the City to approach community engagement with a more targeted approach. The strategy is to directly converse with the communities that are most affected by tenant protections. With the Challenge Grant Fellow, and translator when needed, we plan to engage with smaller, focused groups, including with communities of color, to learn about their experiences as tenants. The smaller, focused groups will allow direct dialogue between tenants and the project team in a supportive environment that is less intimidating than large public forums. This will allow the City to gather a range of qualitative data that has not been previously available. Through these efforts, we can learn the shape, scope, scale, and breadth of issues challenging renters in Palo Alto. This can help to refine the policies by ensuring those pursued directly impact our local community.

In addition to focusing on tenants, we also plan to speak with other stakeholders directly affected by tenant protections: landlords. We discuss this strategy further in the community engagement section. A key component of working with communities of color, low income renters, and other tenants is creating space to hear their stories and helping to broker the dialogue between these communities and landlords. In addition, we hope to engage the broader community in the discussion, because truly, the entire community is impacted when renters have unstable housing.

IV. PAST EFFORTS

Please describe the most significant tenant protection or affordable housing preservation policies that your city has passed in the past 2-5 years. In your answer, please include:

- *The impact made*
- *Key elements that made the adoption, implementation, and impact possible.*

If you have not made significant policy progress, please explain why and describe your obstacles. Include in your answer:

- *An overview of the political and economic context, identifying anything your city could have done differently to pass the policies.*

- *An explanation of how your proposed Challenge Grant effort will be different from these past efforts.*

In 2018, the City Council adopted an emergency ordinance No. 5441 or Palo Alto Municipal Code 9.68 – which required properties with 50 or more units, provide a relocation assistance for no-fault evictions, with additional relocation assistance payments to a tenant aged 60 years or older, disabled, or low-income household as defined by Palo Alto Municipal Code 16.65. This emergency ordinance was a direct engagement of the tenants being displaced at the President Hotel. Prior, Council has also adopted the following policies:

- Palo Alto Municipal Code 9.74 – prohibiting landlords to discriminate against families from having fewer than two persons occupy a bedroom per unit;
- Palo Alto Municipal Code 9.72 – providing tenant-landlord mediation services;
- Palo Alto Municipal Code 9.68 – requiring landlord offer at least one-year leases.

Housing production has allowed preservation of existing housing by expanding the housing supply. From a code-based approach, City Council has adopted or modified ordinances to encourage housing production. Most recently in 2018, City Council adopted the Affordable Housing Combining District, similar to an overlay, that allows flexible developmental standards, to create 100% affordable rental housing in commercial zoned areas within half-mile of transit, and adopted the Workforce Housing Combining District, which encouraged development for middle income households by incentivizing development within half-mile of transit flexible development standards in the Public Facilities zoning district. In 2019, the City Council incorporated the Housing Incentives Program into the Zoning Code, (1) to allow an increase of floor area in certain zones, (2) increase unit density in the multi-family residential zones, (3) allow 100% affordable housing projects to be exempt from the retail preservation requirement and (4) allow certain properties adjacent to El Camino real to use commercial floor area for residential to increase the housing floor area.

In addition, the City Council has adopted the Housing Work Plan, a staff proposal to update the Municipal Code to encourage housing consistent with the City's Comprehensive Plan and modified the Accessory Dwelling Unit ordinance to facilitate more second units. The Housing Work Plan includes policies, programs, and proposed changes to help increase the production of housing. The Plan aims to enable the production of 300 housing units per year to meet the goals of the Comprehensive Plan, which calls for 3,545 to 4,420 housing units to be built between the years of 2015 to 2030. Notably, the City adopted a series of updates to the City's Accessory Dwelling Unit (ADU) ordinance. The ADU ordinance went beyond State mandated ADU requirements to encourage second units, including junior accessory dwelling units and conversions of garages to ADUs. This housing work plan has allowed for a significant increase in the production of ADUs and notably, a 100% affordable housing project of 59 units, the first fully affordable residential development in eight years.

Lastly, the City Council has also supported efforts to the preservation of the housing stock. The City works with Palo Alto Housing to administer its deed- restricted units and also contacts the Department of Housing and Urban Development (HUD) and California Tax Credit Allocation Committee (CTCAC) of affordable housing projects and expiring contracts. The City has

adopted policies in 2017 Comprehensive Plan, which laid an overarching goal of preserving a sustainable community. In Policy L-2.3, a key part of preserving a sustainable community was to allow and encourage mix of housing types and sizes to be integrated into neighborhoods and designated for greater affordability. In addition, the recent Housing Ordinance has allowed parcels that have a residential use that exceed the maximum density to be redeveloped or replaced at the existing density if the project continues as rentals. If projects are to be redeveloped from rental to ownership, Palo Alto Municipal Code 21.40 requires that at least 25% of the total units must be affordable for low to moderate income households and that current tenants have the first right to refusal to purchase unit. Rental preservation continues to be a priority task in the City's Housing Work Plan and work are underway.

The Challenge Grant efforts will differ from these past efforts because of (1) the evolving political context and (2) the approach to community engagement proposed. Prior to the aforementioned President Hotel challenge, the City Council had taken up issues related to tenant protections. Some have reflected that the conversation and dialogue became fraught, with divisions appearing and certain topics becoming lightning rods. When the President Hotel was a crisis, the real lives impacted by the eviction notices touched the hearts of many in the community. The crisis inspired direct response as well as a desire to be more proactive. This community experience has shifted the dialogue, creating space for a renewed conversation about how to ensure Palo Alto remains a desirable community with a high quality of life that is inclusive of our low- and moderate-income residents.

We also believe that our approach to community engagement will build on this moment and bring stakeholders into the conversation in unique and constructive ways.

V. STAKEHOLDERS AND COMMUNITY PARTNERSHIP

Please share your plan to engage your community on this process, with a specific emphasis on engaging low income and communities of color. Include in your answer:

- *Description of the local stakeholders most critical to achieving your policy outcomes — including tenant rights groups, affordable housing developers, policy organizations, and/or neighborhood groups.*
- *The community groups you will partner with most closely to engage community and develop/pass meaningful policy.*
- *The community group that will serve as your lead partner (This group will receive two years of financial support for their partnership). Please describe the role this community group will play, why this community group is best positioned to lead on this effort, and your past relationship with this group. We are open to more than one community lead.*
- *How you will work with your lead partner and other community groups to foster true partnership. The expectation is that the jurisdiction will take the lead in building/maintaining transformational community partnerships, with Fellows helping to facilitate the process*
- *The direct support (e.g. financial, other) that you will invest in your community partners to ensure the success of your community engagement efforts.*

- *Include a letter from your community organization or organizations acknowledging that your community partnership plan, including budget, was crafted with their input. [All documents can be uploaded in Step 8 of this application process]*

In order to successfully advance renter protection policies in Palo Alto, the City and community partners must work to (1) gather quantitative data, (2) engage all of the stakeholders, (3) facilitate dialogue among stakeholders, (4) frame the issues, (5) distill and evaluate solutions, and (6) propose solutions to decision-makers.

(1) Gather Quantitative Data:

First, the Team, to be composed of City staff, the Challenge Grant Fellow and Silicon Valley at Home (SV@Home), will gather quantitative data of renters in Palo Alto, which will include more place-based data, such as income analyses by race and ethnicity. This will enable the project team to identify stakeholder groups for the qualitative data gathering stage.

(2) Engage Targeted Stakeholders:

This qualitative engagement, intended to complement the quantitative data, will first identify different stakeholder groups, as well as individual leaders and organizations within each group. Stakeholders in the City include developers, property owners, renters, and range of perspectives of various local organizations of Palo Alto Forward, Palo Alto Housing Corporation, and Palo Alto Unified School District. Most importantly, the project team will reach out to affected groups that are often not engaged such as RV dwellers, business owners, service workers and those working with at-risk communities, such as intervention organizations as Downtown Streets Team and our local homeless shelter. It is essential that SV@Home and the Challenge Grant Fellow, with their expertise, assist with building and trust in the engagement process. After initial relationship building, the Challenge Team will engage in various methods to solicit input from the stakeholders, including interviews, pop-up workshops, surveys, and listening tours to understand the various perspectives of the communities. Through engaging with stakeholders separately, the Team can further refine the problems so that it is clear what issues need to be addressed.

(4) Distill and Evaluate Solutions:

The targeted outreach to stakeholders will help reveal the values and priorities of stakeholders, as well as refine the problems faced by renters, the constraints landlords express, and opportunities to advance tenant protections. The Challenge team can integrate this qualitative and quantitative data in order to refine the problems, research solutions, and distil a package of policy proposals specifically designed to address concerns in Palo Alto and calibrated to our local community. Considering the stakeholders will identify various problems, this phase will include policy research and analysis of the potential impacts of solutions if applied in Palo Alto.

(5) Framing the Issues:

The Challenge Team will then prepare for near simultaneous presentation of this policy package. We will engage the broader community in a conversation about how to protect vulnerable tenants in our community. Protecting renters affects more than landlords and tenants, it affects the entire community. By deliberately engaging a broader group of residents, we can share the policies, their intended impacts, and gain valuable feedback.

The outreach and listening tour will define the needs of the stakeholders and frame issues and will guide the Team's exploration of solutions. This process will also include additional outreach to the broader community, including facilitated dialogues, panel discussions, online surveys, pop ups, and meetings with other neighborhood groups.

(6) Propose Solutions to Decision-Makers:

Ultimately, the Palo Alto City Council will need to consider the policy package. The full Council can consider this; they may also refer the item to the Policy & Services Committee, as well as the Planning and Transportation Commission. The City Council values community input. The formal Council hearings serve as an opportunity for community engagement via public comment and the discourse among decision makers. We anticipate that the Challenge Team will bring the package forward to the decision-makers for an initial hearing, then engage the broader community as defined in step 5, and then return to the Council following the broader conversation. This interplay between formal hearings and more dynamic public engagement is a delicate balance that will need to be carefully considered as the policies advance.

Overall, the comprehensive and inclusive community engagement strategy will foster trust and support by creating an understanding of the community's various issues and priorities for tenant protections. The effective engagement will in turn, be used to inform policy changes. Policy development will require a form of public deliberation to seek collective solutions that can be supported by the broader community and eventually adopted by City Council.

This proposed community engagement plan provides for engagement earlier in and throughout the process, in order to build trust and foster a relationship. This relationship is critical for the development of a common understanding. The common understanding is needed to lead to solutions that not only address actual needs but will have the support of the larger diverse community.

The City has asked Silicon Valley at Home (SV@Home) to be the lead partner on this endeavor. SV@Home has been the voice for affordable housing in the Silicon Valley since its inception. The organization has advocated for policies, programs, land use, and funding that have directly correlated with tangible outcomes all over the Silicon Valley. The organization has worked at a regional scale advocating for policies for affordable housing by engaging local jurisdictions' staff, providing technical support, and facilitating conversations. The organization's approach has been very pragmatic as exemplified in completed advocacy work through education, engagement, and awareness for very diverse groups with diverse interests. Particularly, SV@Home can support policy conversations directly with advocates, various communities, and elected officials. Understanding the community climate, and very diverse interests, SV@Home is the ideal organization to deal with a challenging topic in this community, pragmatically.

The City believes that the partnership should be an open dialogue and an exchange of ideas. With SV@Home, the City will refine a community engagement plan. The Challenge Grant Fellow, with extensive and innovative community engagement experience, will help facilitate the discussion with the community. The team will regroup after each session and discuss changes needed for the next engagement and adapt to the various groups.

The Grant will provide resources for staffing and also for more expertise in community engagement, from both the Challenge Grant Fellow and our partner organization, SV@Home to

allow for a more robust community engagement process. The Challenge Grant Fellow and SV@Home will be invaluable assets to the community engagement process. Often the most difficult process in the plan is identify all the stakeholders who are often not heard. Staff plans to have implement open communication with stakeholders, intended to inform each phase of the project and throughout the process. This multi-pronged approach to dialogue will give the community opportunities to influence the outcome at any point throughout the process, empowering them in the decision-making process.

VI. CITY LEADERSHIP, & CONTRIBUTION TO SUCCESS OF EFFORT

Please describe what your city will contribute to ensure the success of this effort. In your answer, please include the following:

- *Demonstrate your jurisdiction's track record of passing progressive housing policies*
- *Identify in-kind support and resources to advance your proposed work*
- *Name staff, including executive team members, who will play a lead role in this effort. Describe their roles in the effort and their relationship with the Challenge Grant fellow.*
- *Name the staff member or elected that will directly supervise the Challenge Grant fellow and indication of where they sit in the organizational chart, relative to leadership.*
- *Elaborate on the political context of your jurisdiction, including:*
- *Whether you have the council votes necessary to adopt these policies and secure the budget to implement them.*
- *The role that the City Manager and/or Mayor may play in helping to advance the proposed policy package and ensure implementation. If you do not foresee the City Manager/Mayor playing a role, please provide additional context as to why not and how you plan to work around that, if applicable.*
- *Description of the community context as it relates to the adoption of proposed policies*

The City Council has taken many progressive regulatory and policy actions as mentioned earlier in the application with the adoption of the following: The Affordable Housing Overlay/Combining District, the Workforce Housing Overlay/Combining District, the Housing Incentives Program, the Accessory Dwelling Unit ordinance, and the Housing Work Plan. The City intends to continue develop innovative new policies to implement but will need additional resources, such as those provided by this Challenge Grant.

This effort will be supported by a range of experienced planning staff. The Challenge Fellow will work under the direction of the full-time manager of the Long-Range Planning Team and will be a lead collaborator with the City's full-time senior housing planner as well as working directly with SV@Home. In addition, staff will also be supported by the Planning and Development Services Department Director and Assistant Director. Both the Director and Assistant Director have deep housing experience and an understanding of Palo Alto specific issues. To show the commitment to the community engagement, the City's management staff will be deeply involved in the community conversation throughout the process, providing an additional link between the City Council and the stakeholder groups.

By providing the community with the opportunity to be engaged throughout the process from its initial inception and onward, it becomes possible to build true community support, clearly

communicating to the City Council the importance of this work. Palo Alto has a very engaged City Council who place great importance on understanding the issues and the needs of their constituents, often engaging in spirited debates. Palo Alto has seven council members, with the mayor leading the public hearings and setting up priorities. The City Manager and staff work with the mayor in structuring public hearings and meeting, to allow for meaningful discussions. The City Manager will provide support for the Mayor in context and procedures to adopt proposed policies.

The City has very engaged and educated residents, with over 97.2% of the community attaining a high school diploma or higher. Thus, there is a demand for significant amount of data and information, along with extensive community engagement to build support if changes are proposed. It is critical that the Team create strategies to ensure productive community engagement activities that will bring people towards solutions to the challenges and not intensify the divide.

VII. APPROACH AND KEY MILESTONES

Please explain your approach to passing and beginning successful implementation of your policy package, including:

- *Key activities and timeline for policy development, passage and implementation, including semi-annual milestones.*
- *Key stakeholders for policy development, passage and implementation.*
- *Your plans for implementing these policies once they are adopted, including timeline, responsible departments/staff and budget.*

A critical factor for successful implementation of potential tenant protection policies is continued community engagement in the development and implementation of policies. During the policy development process, the Team has to ensure that the outcomes during the outreach portion of the community engagement are fully considered and articulate the values and goals into tangible policies. By conveying the community's goals, this can form a partnership and allow empowerment with community to long-term commitment to the community engagement process.

All potential policies in the City will need to follow proper process and include maximize community engagement. Not including public noticing, below follows the potential timeline of the community engagement process. The potential timeline as follows for community engagement and implementation of policies:

-KEY DATES AND MILESTONES-

November – January 2020

Challenge Grant Award Announcement; City Council accepts grant award (City of Palo Alto Planning and Development Services (PDS) Department)

January – February 2020

Strategy Meeting for Community Engagement Process; Development of Stakeholders' List (PDS Department, Challenge Grant Fellow, and City Manager's Office)

March – June 2020

Community Engagement Meetings and Listening Tours (PDS Department and Challenge Grant Fellow)

June 2020

Policy Development Meetings (PDS Department and Challenge Grant Fellow)

July 2020

Convene and Propose Policies from Community Engagement (Facilitator, Challenge Grant Fellow, and PDS Department)

August 2020

Study Session with City Council; broader community dialogue (Challenge Grant Fellow and PDS Department)

September 2020 – December 2020

Draft Policy Suggestions for City Council Policy and Services Committee review; continue community dialogue through focused activities; City Council discussion continues (PDS Department, City Attorney, Challenge Grant Fellow)

January 2021

Draft an Ordinance (PDS Department and City Attorney)

February 2021

Draft Ordinance for 30-day Public Comment (PDS Department and Challenge Grant Fellow)

March 2021

Public Hearing on Ordinance to Planning and Transportation Commission (PDS Department and Challenge Grant Fellow)

April 2021

Public Hearings on Ordinance to City Council (PDS Department and Challenge Grant Fellow)

May 2021

Adoption of Ordinance (PDS Department and Challenge Grant Fellow)

June 2021

Ordinance Effective (PDS Department and Challenge Grant Fellow)

July 2021

If Ordinance relates to fees, 60 days effective (PDS Department and Challenge Grant Fellow)

July 2021 – onward

Implementation of Ordinance (PDS Department, City Attorney and Challenge Grant Fellow)*

June - August 2021 – onward

Renters and Landlord Workshops (PDS Department, Challenge Grant Fellow, BMR Administrator, and Translator)*

August 2021 – onward

Additional Community Education and Website to enable successful Implementation (PDS Department, Challenge Grant Fellow, BMR Administrator, and Translator)*

***City staff to work with initially with Challenge Grant Fellow to establish format and to carry out going forward.**

CHALLENGE GRANT FELLOWS



Lauren Bigelow (Palo Alto)

Lauren (she/her) joins the Fellowship from Palo Alto Housing, where she helped create policy and administered Below Market Rate programs for the cities of Palo Alto, Mountain View, Redwood City, and Los Altos. While at Palo Alto Housing, Lauren focused on educating tenants on local housing policy and connecting them to local housing and advocacy resources. Lauren serves as a Commissioner on Menlo Park's Housing Commission and San Mateo County's Commission on Disabilities, where she works to review development proposals and update affordable housing guidelines to ensure equity and inclusion of historically excluded communities. Prior to Palo Alto Housing, Lauren worked at College Track in East Palo Alto to bridge opportunity gaps faced by low income communities disproportionately comprised of people of color. She has a BS in Psychology and Social Action from Palo Alto University and a BA in Theatre and Communications from Goucher College in Baltimore, MD. Lauren is devoted to preserving the diversity of communities by protecting current residents and increasing the supply of affordable housing.



Karen Camacho (East Palo Alto)

Karen (she/her) is an experienced organizer, coming most recently from the Housing Leadership Council of San Mateo County (HLCSMC). At HLCSMC, Karen advocated for the protection, preservation, and production of affordable housing; collaborated with different government and community stakeholders; and empowered residents to speak up about affordable housing opportunities in their communities. She also worked to implement the Surplus Land Act and to ensure affordable housing opportunities on public land. Prior to joining HLCSMC, Karen worked at the ACLU of Northern California as an organizer and policy advocate on criminal justice and reproductive rights issues. She gained much of her early advocacy experience organizing around Latinx rights in college and advocating – alongside Buena Vista Mobile Home Park residents – for individuals facing eviction. Karen has interned at the Lawyers' Committee for Civil Rights Under Law in Washington, D.C., and worked as a mentor and educator for youth in San Mateo and Santa Clara counties. She is passionate about empowering marginalized communities and ensuring that low-income people of color have the tools they need to authentically create the changes they want to see in their communities. Karen completed her bachelor's degree in Political Science and a master's degree in Latin American Studies at Stanford University. She currently serves on the Rent Stabilization Board of East Palo Alto.

CHALLENGE GRANT FELLOWS



Anna Cash, MCP (Berkeley)

Anna's (she/her) interests and experience center around social, racial, and economic justice, and planning for more equitable cities. Prior to the fellowship, Anna held the role of Program Director of the Urban Displacement Project (UDP) at UC Berkeley, where she was responsible for research management, with an emphasis on community engagement and policy applications of research on displacement. During graduate school, Anna's research explored the diversity of housing tenure types in Oakland, shedding light on who is left out of resident protections. Prior to graduate school, she lived in Brazil, conducting research on worker cooperatives, and reporting on displacement and the inspiring community organizing happening in favelas. Anna holds a bachelor's degree in Sociology and Latin American Studies from Wesleyan University, and a Master's in City Planning from UC Berkeley. She is very excited to work collaboratively with community partners and the City of Berkeley towards implementing creative housing justice strategies.



Brandon Running Bear Harrell (Redwood City)

Brandon (he/they) works at the intersection of sociology and ecology, where economic development and permaculture design meet to provide for all human needs. His 10 years of demonstrated background in urban innovation and community building continue to help scale radical inclusion and systems change. Brandon is a partner at the Urban Permaculture Institute where he co-developed locally responsive, urban and environmental planning strategies and recommendations to regional governance and "grasstops" organizations. Previously, Brandon was a full time GIS software geek and diversity, equity, and inclusion advocate – holding director-level positions at organizations such as GIS Planning Inc., Change Catalyst, and Impact Hub. As director he led efforts to develop partnerships and programs as well as support engagement with local communities – contributing to the economic opportunities and stabilization of their residents and culture. Though born and raised in the Bay Area, his expertise in urban innovation and community planning enabled him to work on community development and environmental justice projects as far as Taiwan, Portugal, the United Kingdom, Germany, Turkey, Nicaragua, Cuba, and Kenya. Brandon has lectured about planning and development in the United States and the Caribbean and has taught at UC Berkeley. Brandon holds a master's degree in City Planning from UC Berkeley, an MBA from LIFT Economy, and a bachelor's degree in Communication from the University of New Mexico. When he's not working, he can be found practicing archery or cooking with his partner.

CHALLENGE GRANT FELLOWS



Charles Harris (Alameda County)

Charles (he/him) is joining the Fellowship from Hello Housing, where he was the Program Manager for Cupertino and the Town of Los Gatos Below Market Rate programs. Prior to Hello Housing, Charles was at Hamilton Families working to help families experiencing homelessness find stability by leveraging policy tools to connect them to affordable housing. He comes with experience managing large municipality-based affordable housing programs that include down-payment assistance, homeownership, and rental opportunities with the goal of augmenting those programs to work better for the people. Charles has extensive research experience and a strong understanding of affordable housing policies, production, and market trends, which has given him a concrete understanding of how organizations can move towards making housing more accessible for all communities and families. Charles is most interested in both creating pathways to homeownership for low-income and working-class families, as well as exploring new and innovative ways to create and preserve affordable housing.



Zachary Murray (Oakland)

Zachary (he/him) was most recently a program manager for the Oakland Community Land Trust, where he worked to promote resident-centered solutions, community ownership, and permanent affordability through policy advocacy, technical assistance, and fundraising. Additionally, Zach works as a training specialist and practitioner with a focus on affordable housing development and finance for the People of Color Sustainable Housing Network. Previously, he was a state and local policy specialist with Grounded Solutions Network. While at Grounded Solutions, Zach led the development of the Inclusive Communities Toolkit and Inclusionary Housing Calculator 2.0 and provided research and spatial analysis to support local inclusionary housing and affordable housing preservation efforts in Detroit, New Orleans, and Pittsburgh. Zach also studied homeownership and racial equity patterns in California's statewide and local housing markets while serving as an economic equity manager at the Greenlining Institute in Oakland. A graduate of Cornell University, Zach's passion for community development and justice using race and place as a lens is inspired by his upbringing in Baltimore, MD.

CHALLENGE GRANT FELLOWS



Aboubacar "Asn" Ndiaye (San Jose)

Aboubacar "Asn" (he/him) has been generating and advocating for policy to achieve economic and racial justice in Silicon Valley through innovative policy, research and organizing campaigns that focus on affordable housing and anti-displacement, transportation justice, and quality jobs. Prior to joining the fellowship, he was Policy Manager for Working Partnerships USA, a community organization bringing together the power of grassroots organizing and public policy innovation to drive the movement for a just economy. Before Working Partnerships, he worked as Strategic Researcher for SEIU Local 1, responsible for planning and developing organizing campaigns for building services workers in the Midwest, and as an Employment Specialist for Goodwill Industries of Houston, where he assisted individuals with barriers to employment find gainful and sustainable work. Asn has also worked or volunteered in a variety of roles on electoral campaigns in Texas, Michigan, and Illinois. He is a proud immigrant and a graduate of the University of Texas at Austin, where he earned a bachelor's degree in Government. His interests include making cities more equitable, labor history, and traveling.



Partnership for the Bay Challenge Fellow

Loaned to Challenge Grant Jurisdiction via Interagency Partnership Agreement

Introduction

Now more than ever, leaders across California and the nation are looking toward the Bay Area for innovative solutions that will lead our communities toward a more inclusive future. At the same time, the region is at a crossroads. Our economy is one of the strongest on the planet, yet inequality is skyrocketing, and we face a housing and displacement crisis that has hit low-income and communities of color particularly hard, which has had a ripple effect throughout the region.

Partnership for the Bay's Future is a collaborative regional effort to address these pressing challenges and is one of the most ambitious investment and policy initiatives in the nation. Through two separate funds, the Partnership focuses on both policy, such as tenants' rights, and investments in housing development, to tackle these issues holistically and at an unprecedented scale. The San Francisco Foundation has selected 7 jurisdictions to implement high-impact, achievable plans for policy initiatives to support with Challenge Grant funds. These 7 Challenge Grant jurisdictions will be matched with a mid-career fellow supervised by Policy Link to increase the city's capacity to pass meaningful protection and preservation legislation.

This fellowship creates an opportunity for ambitious leaders to work with the nation's most forward-thinking housing and economic leaders to advance the next generation of housing policy in one of the most influential regions in the world. Fellows will be responsible for championing the development, adoption, and implementation of innovative and high-impact policies in collaborative partnership with community and staff from departments across the jurisdiction.

The Position

A Cohort of 7 fellows will work under the supervision of PolicyLink to support the development and implementation of the Challenge Grant proposals. Each fellow will be assigned one local jurisdiction to work with directly and will be the champion of the project work plan for that jurisdiction. The Cohort will work as a team to develop of effective communication tools for this initiative's findings, accomplishments and best practices to a wide variety of audiences.

This is a 2-year limited term position focused on managing a regionally specific policy project of a local jurisdiction in the Bay Area. The project proposed by a local Bay Area jurisdiction is made possible by the Partnership for the Bay's Future, a regional collaborative effort to address efforts to engage and align leaders in the equity field. The San Francisco Foundation and Policy Link have partnered to create The Challenge Grant Fellowship to build capacity, expertise, and collaboration in local jurisdictions to address the Bay Area's affordable housing crisis. Seven jurisdictions were selected for high-impact, achievable plans to advance policy in anti-displacement strategies, affordable housing development, and protection of existing affordable housing. Under the direct supervision of a Policy Link Senior Associate on the Housing Equity Team, this position will support one of the seven to jurisdictions in the Challenge Grant pool to increase the jurisdictions capacity to pass meaningful affordable housing protection and preservation legislation.

Major Duties and Responsibilities

Strategic Planning. Work with the project team to complete and execute an overall strategic work plan for project. Clarify priority stakeholders and related communications efforts. Draw on PolicyLink field and communications expertise to inform strategic plan (including honing of messages and identifying media targets).

Team Support. Community partner staff have significant contributions to make to the communications effort. The Fellow will work with community partners to ensure that their expertise is utilized for maximum impact to support the communications strategic plan and coordinate specific activities that support the jurisdictions ability to inform decision makers on issues that relate to project goals. Support jurisdiction staff to develop policy language by conducting research.

Project Management. Initiate, plan, execute, control, and close the work plan for the team assigned to the identified Challenge Grant Proposal. Produce regular reports on project goals and support team members to meet specific benchmarks on identified timelines. Support identified jurisdiction staff to achieve all project goals within the given time constraints. Support team to shape or reform the objectives as needed to deliver on the project goals. Schedule and facilitate monthly meetings of project team to identify action, tasks, and deliverables, and to present reports that influence decisions made by other people involved in the project.

Coordination of Best Practice Management. Support program evaluation efforts for the initiative with compelling stories and media-worthy collateral. Translate communication of these practices into a core element of work to infuse improved practice in the jurisdiction and in the field. Conduct report writing, program evaluation, case study compilation, and preparation of material for publication. Incorporate PolicyLink and other equity leader's expertise in framing issues of anti-displacement strategies and affordable housing protection and development.

Media content. Preparing talking points and scripts for education. Help prepare senior officials for interviews and community meetings. Draw on PolicyLink connections with media outlets and social media in communities of color to expand reach of communications efforts to broader audiences and equity field. Draft articles for placement in field publications with audiences of

practitioners, as well as in key blogs, to build awareness of program accomplishments and frameworks for policy action. Leverage media placements to build awareness of mainstream media and generate coverage of initiative successes. Generate qualitative compelling descriptions with quantitative evaluation.

Position Responsibilities

- Champion the development, adoption, and implementation of innovative and high-impact policies in collaborative partnership with community-based organizations named in the project and staff from City or County Department the selected proposal.
- Work with project partners to produce project workplan with data driven benchmarks
- Monitor project work plan and prepare weekly reports on progress toward benchmarks, and process evaluation
- Conduct background research on organizations and equity leaders to gather information to inform areas of focus, partners, and publications for reference
- Analyze research to lay out and understand connections and relationships among equity leaders as well as their presence in the field, on social media, etc.
- Write reports and develop presentations for decision makers and community members
- Deliver reports and presentations to decision makers and stakeholders
- Facilitate of integrated partnership with government, community and advocacy organizations, related to the development of government planning or policy processes
- Research and develop communication and education products to support constituency alignment in the functional area of the project
- Provide leadership in the convening local stakeholders and community partners to inform policy development
- Internal (and possibly external) meeting support including scheduling, logistical coordination, agenda preparation, development of meeting materials, and notetaking
- Commit to racial and economic equity
- Conduct data analysis and research to support policy development, advocacy, or organizing
- Conduct to research and development of education tools for elected, stakeholders, and community partners on local landscape of affordable housing issues and dynamics and the development and implementation of protection and preservation policies
- Conduct research on the cultural, political, policy, and market dynamics at play in affordable housing development and the Bay Area