

Partnership for the Bay's Future

Learning Cycle 2 Report

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PREPARED BY
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Cycle 2 Overview

As part of Cycle 2 of the learning and evaluation engagement with The Partnership for the Bay’s (PBF) Future to evaluate the Policy Grant Fellowship, we conducted four cross-site focus groups in July 2023. All PBF sites participated and nearly every site had at least one of two core team partners—jurisdiction and community-based organization (CBO) partners—in attendance alongside the site team’s Fellow.* During this learning cycle, we facilitated conversations about shared learnings by organizing focus groups on four policy themes, a new approach for this project. This method allowed sites working on similar policy goals to build off each other’s responses, build camaraderie, and offer insights and suggestions to strengthen regional connections between housing advocates and local governments. We distributed a short questionnaire to core team members who could not participate and received two responses.

Fellows also tracked key Policy Grant indicators from the start of the Fellowship in June 2022 to June 2023, including the number of policies passed or introduced, number of community meetings, funding engagements, and number of units to be produced or preserved. Fellows developed the indicators at the start of the Fellowship to align with the evaluation’s emphasis on being equitable and participant-guided.

FOCUS GROUPS BY THEMATIC FOCUS

COPA/TOPA:**

- East Palo Alto, Mountain View

Equitable Development/Production:

- Berkeley, Oakland, San Francisco

Preferential Land Use:

- Antioch, Housing Authority of Contra Costa County (HACCC), Richmond

Preservation:

- Bay Area Housing Finance Authority (BAHFA), San José, South San Francisco

* All Fellows, jurisdictions, and CBOs participated in focus groups except the San Francisco Fellow (the position was vacant at the time), and government representatives from Oakland and Antioch.

**Community/Tenant Opportunity to Purchase Policy



Policy Progress & Learnings Highlights

Policy Progress

We asked sites about the progress they have made since the Cycle 1 focus groups in Fall 2022. Below is a summary table of each site’s progress. A more detailed description of work conducted this period is included in the **Detailed Site Policy Updates** section. Sites with an asterisk received a prior Policy Grant during PBF’s first grants in 2020.

EXHIBIT 1 – Site Team Policy Progress

| SITE | POLICY PROGRESS |
|-----------------|---|
| Antioch | <ul style="list-style-type: none"> • Setting up listening sessions to inform Accessory Dwelling Unit (ADU) work. • Working on creating two committees: (1) faith leaders and (2) residents. • Exploring new partnerships, as the previous church partner in the microhome project no longer controls its land. |
| BAHFA | <ul style="list-style-type: none"> • Planning to launch Housing Preservation Pilot Notice of Funding Availability (NOFA) with Regional Early Action Program (REAP) 2.0 funding. • Working on streamlining Welfare Tax Exemption process. |
| Berkeley* | <ul style="list-style-type: none"> • Passed a Housing Preference Policy that prioritizes displaced families and their descendants in South Berkeley for placement in affordable housing projects in the area. • Focusing on community engagement for Equitable Black Berkeley through Public People’s Assemblies. • Setting up funding streams like an Enhanced Infrastructure Financing District (EIFD) and an Environmental, Social, and Governance (ESG) fund. |
| HACCC | <ul style="list-style-type: none"> • Released RFQ for first phase of Las Deltas property sale; moving into second phase of sale once first phase developers have been notified. • Conducting outreach to former Las Deltas residents. |
| East Palo Alto* | <ul style="list-style-type: none"> • Secured a commitment of \$150,000 to produce a rental registry and another \$100,000 for an emergency rental assistance program. • Continuing work on a March 2022 City Council request for staff to conduct and share additional research into the Opportunity to Purchase (OPA) primarily concerning the inclusion of single-family homes in the right of first refusal. • Securing funding for housing affordability and developing a rent registry. |

Policy Progress (continued)

EXHIBIT 1 – Site Team Policy Progress (continued)

| SITE | POLICY PROGRESS |
|---------------------|--|
| Mountain View | <ul style="list-style-type: none"> • Preparing for back-to-back council sessions focused on (1) local replacement requirements and (2) displacement response strategy. • Working to create a documentary of the conversion of the Crestview Hotel into residential units. The documentary will be used to build support broadly for housing efforts. |
| Oakland* | <ul style="list-style-type: none"> • Adopted major changes to the City’s NOFA program’s policies to be more inclusive of emerging developers. • Revitalizing Oakland’s pre-development loan program to make it more accessible for emerging developers. • Exploring formalized partnerships with third-party private programs that can support BIPOC developers. |
| Richmond | <ul style="list-style-type: none"> • Included Policy Grant priorities in the City’s Housing Element, which ensures work can continue beyond the grant term. • Creating an interactive map of all vacant, abandoned, and tax-delinquent properties. • Currently exploring constraints to their work given the Surplus Land Act. |
| San Francisco | <ul style="list-style-type: none"> • Completed the first round of the Developers of Color Cohort program and launched applications for the second cohort. Learnings from the cohort will inform recommendations for the City’s development process policies. • Reviewing underwriting guidelines to understand what shifts could further advance equity. |
| San José* | <ul style="list-style-type: none"> • Preparing for a late Fall council study session on the Three Ps (Protection, Preservation, and Production) of housing. • Developing an NOFA to fund acquisition and rehabilitation work. • Conducting additional research and analysis to make the case for a more robust preservation ecosystem in San José. |
| South San Francisco | <ul style="list-style-type: none"> • Issuing an RFP to contract with firms to facilitate a tenant-landlord advisory board that will inform anti-displacement efforts through different lenses and interests across the housing ecosystem. The goal is to recruit trusted voices that will not act as lobbyists. |

Policy Theme Findings

Policy Grant teams are making progress towards their policy goals. As teams achieve small and big wins, they encounter a multitude of obstacles and are utilizing diverse methods to overcome them. Major findings include:

- A major innovative policy such as **COPA/TOPA requires much more research and engagement** with supporters and opponents than other policies the site teams pursue. As a relatively new policy, elected officials need to be educated about it and require trusted voices to provide the education and evidence.
 - Site teams pursuing **preferential land use policies are facing less opposition, as these policies are much more focused in scope** (i.e., small units being built in backyards or church lots, or the relative isolation of areas where development is taking place).
 - Sites working on **equitable development are focused on building the capacity of emerging developers and establishing links among developers, third-party programs, and the City**. This will increase the number of developers working on City projects with closer ties to the communities in which projects are happening.
 - Teams advancing **preservation policies are taking a comprehensive approach, building out the infrastructure** of preservation work through funding opportunities and education efforts.
-

Cross-Site Team Key Learnings

- Many **Policy Grant site teams are making strategic shifts in their policy approaches to counter opposition to specific policies, to garner support, or as a reaction to changing political conditions.** For instance, since the San José City Council (SJCC) rejected the COPA policy, both Mountain View and South San Francisco are positioning their COPA/TOPA policies as part of broader efforts toward housing preservation and anti-displacement.
 - **Some site teams are advancing their goals through administrative changes, or ‘little p’ policies. This strategic approach allows for small changes over time as opposed to introducing sweeping policies city staff may not welcome all at once.** A good example of this approach is Oakland, where the team has succeeded in the City adopting several administrative changes more inclusive of emerging BIPOC developers.
 - **Strong community engagement, education, and support are priorities across most site teams, especially in the face of better-resourced opposition.** East Palo Alto has learned from its ongoing policy efforts that the opposition from outside the community could show up with enough support to derail a policy. Other sites, such as Antioch and HACCC, are engaging with a very specific group of community members.
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Policy Theme Findings

Context to Policy Themes

During this learning cycle, we facilitated conversations about shared learnings by organizing focus groups on four different policy themes (at right). These policy themes are based on our initial analysis of each site team's policy goals. We confirmed with Fellows which policy theme best fit each of their site teams.

However, it's important to note most of the site teams are working on a variety of policy areas beyond these four major categories. Thus, focus group participants talked about their whole range of policy work.

The four policy themes arose organically based on sites' self-identified policy goals articulated in their grant applications and the scope of the work they outlined at the start of the grant period.

QUICK REFERENCE: FOCUS GROUPS BY THEMATIC FOCUS

COPA/TOPA:

- East Palo Alto, Mountain View

Equitable Development/Production:

- Berkeley, Oakland, San Francisco

Preferential Land Use:

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Preservation:

- Bay Area Housing Finance Authority (BAHFA), San José, South San Francisco

COPA/TOPA

The Opportunity to Purchase Act (**OPA**) is an innovative preservation strategy that creates opportunities for community or tenants to own their home. At the start of the second round of the Policy Grant, three site teams—East Palo Alto, Mountain View, and San José—decided to directly pursue or focus heavily on a COPA or TOPA policy, either as a continuation of previous efforts or as a new policy strategy.

In April 2023, before we began our data collection for Cycle 2, the San José City Council voted against the proposed COPA policy. The site team attributes the outcome in part to recent changes in City Council composition following the 2022 election, and to insufficient understanding of affordable housing preservation in San José more broadly, including current efforts, challenges, and needs, which COPA/TOPA aimed to address.

INSIGHTS

#1: A complicated policy that requires lots of time and education efforts.

- In Mountain View, the site team has conducted extensive research on COPA/TOPA, assessed what elements would be most plausible, and considered how they might be slowly introduced to the Mountain View City Council (**MVCC**) as part of larger anti-displacement efforts in the near future.
- The COPA/TOPA policy development process is long and intense, often spanning years and ultimately voted on by potentially new councilmembers who may be risk-averse in their first terms and unfamiliar with housing issues. After COPA/TOPA was voted down in San José, the San José team reflected that, alongside the policy development process, it is important to continuously educate public officials, the community, and other interested groups about preservation and affordable housing generally, including ways in which COPA/TOPA can help alleviate housing issues.

COPA/TOPA (continued)

#2: Finding and aligning the right voices in support of the policy.

- The East Palo Alto team reflected on their learning from Berkeley and Oakland COPA/TOPA processes about the level of opposition to the policy. The team conducted extensive community engagement before going to the East Palo Alto City Council (EPACC), yet they still received pushback—sometimes not in good faith—about conducting insufficient outreach. This speaks to the amount of engagement needed with homeowners and realtors. Others in the focus group also pointed out that beyond assuaging opposition, particularly from the real estate lobby, what is needed are real estate voices *in support* of the policy. We did not hear any examples of real estate representatives engaging in this process but note these voices can highlight actual experiences in successfully working with COPA/TOPA framework in other cities.
- As research and analysis on the policy is underway, Mountain View CBO partner SV@Home has been working to keep community groups engaged and thinking about the policy. One goal of these early conversations is to ensure the process does not pit different community interests against each other and instead have a unified voice of support in front of MVCC.
- In reflecting on their COPA/TOPA process and upcoming presentation on the Three Ps approach to SJCC, the San José team has been thinking of how to include voices that SJCC will find most credible and unbiased. The San José team shared that at times, it feels like SJCC would like to hear information from experts external to the City, rather than only from City staff whom they may regard as biased in their analysis of the housing situation.

Preferential Land Use

Sites working broadly on preferential land use are focusing on changing the way land is used, either by selling their property to nonprofit developers or by creatively changing the way it is developed:

- Antioch is working to facilitate the construction of micro-homes on faith-owned land and encourage the construction of ADUs. These policies aim to preserve neighborhoods and encourage affordable housing development.
- HACCC is turning over ownership of the Las Deltas land and structures in North Richmond to local developers. Their goal is to welcome back former residents, prevent displacement, and improve conditions for current residents by leaning on local developers who are invested in creating thriving local communities.
- Richmond is working on policies to change the stewardship of public land and blighted or distressed properties with an emphasis on partnering with Community Land Trusts (CLT).

INSIGHTS

#1: Land use policies face less misinformation than other complex policies like COPA/TOPA.

Preferential land use site teams reflected their policy goals do not generate as much opposition as they have observed in other sites working on COPA/TOPA, nor are they subject to challenges related to other legal constraints such as Prop 209.

One focus group participant suggested preferential land use policies such as changes to regulations for ADUs in backyards or tiny homes in unused parking lots are seen as “trying to help people,” thus generating less division of opinion than more complex policies. Another participant shared they have not seen opposition to the site’s development plans, possibly due to a widespread desire to see local developers carry out local projects. A third participant noted their development sites are small, which might help them avoid opposition to their plans from large nonprofit developers in the future.

Preferential Land Use (Continued)

#2: Community engagement is very focused, based on policies' intended populations or specific geographies.

- In contrast to other policy development processes that engage communities across the entire geography of a jurisdiction, sites working on preferential land use have taken a very narrow approach to the communities they engage.
- Antioch has primarily focused on hearing from unhoused individuals who would most likely occupy the structures developed through policy changes and has created a program for these individuals to share their lived experiences. The site is also exploring the creation of a Faith Leaders Advisory Committee.
- HACCC has focused the first part of the Challenge Grant on reaching displaced former Las Deltas residents to gauge their interest in returning and disseminating information about the opportunities available.
- Richmond has developed maps of blighted and distressed properties and is using these maps to engage neighbors and communities to determine which properties would be most useful to develop.

Preferential Land Use (Continued)

#3: Some sites are facing learning curves and delaying broader community engagement.

- HACCC does not typically sell its land. They have encountered challenges with the way their land parcels are mapped out and how the properties sit on those parcels. The site is exploring ways to minimize the fees nonprofit developers pay for acquiring the land and properties.
- Richmond has been studying changes to the Surplus Land Act to determine how it can dispose of or lease city-owned property and exploring additional opportunities such as foreclosed properties.

#4: Preferential land use sites have begun to partner more deeply beyond Policy Grant efforts.

- The three preferential land use site teams have started to convene and discuss their policy goals, challenges, and solutions. Perhaps because all three sites are in the same county, or because of the similarities of their Policy Grant goals and longer-term goals (e.g., ADU tools, lease projects, community engagement strategies), collaboration beyond the Policy Grant may be more straightforward for these sites than other grant sites. The teams are meeting every other month and have involved additional participants beyond those in the Policy Grant. This level of regional engagement supports the continuation of policy work beyond the grant timeframe. The group's initial discussions have centered on developing a county spending plan for a potential bond fund.

“We just had our first Contra Costa County convening [with our site teams], thinking about how we can build on what this network has provided us to grow our table in Contra Costa County and tackle some important upcoming issues.”

– FELLOW

Equitable Development

Three site teams are fostering equitable housing production through different strategies:

- Berkeley’s equitable development approach involves fostering reparations for displaced communities and a community-driven approach to housing development.
- Oakland is changing their administrative policies to be more friendly toward emerging developers.
- Oakland and San Francisco are prioritizing housing production efforts by building the capacity of BIPOC developers to diversify and expand housing production.

Nonetheless, teams are facing similar challenges in tackling power dynamics and legal constraints.

“We were able to have a conversation with the community [about] why the Black community has to lead this. [You] can only reach those outcomes if [you] are centered in this conversation.”

– CBO PARTNER

INSIGHTS

#1: Building capacity across the housing field.

- Building capacity for communities is a critical mechanism to challenge existing power dynamics: the Berkeley site team has set a goal to empower the local community to govern the new funds and provide inputs into the potential community benefits. This way, the community can have a greater say in the outcomes and not be subject to decisions made solely by other major players.
- With staff turnovers across public and private partner agencies, building and sustaining capacity, especially technical expertise, is rising as a major need to sustain momentum in advancing policy work. For instance, city officials in San Francisco are working to support BIPOC developers in navigating the complicated procurement processes required for housing production. Although some of these developers have been in the industry for a long time, many of their staff are new and therefore require additional guidance from City staff.

Equitable Development (Continued)

#2: Fostering relationships within the ecosystem.

Building connections between developers and other important entities in the production ecosystem, as well as fostering collaboration among developers themselves, is an essential link for enhancing knowledge and expertise within the procurement system.

To this end, the Oakland site team is working on establishing formal partnerships between developers and third-party organizations that can provide technical assistance.

“You can't legislate relationships;
you just have to build them.”

– CBO PARTNER

#3: Tackling race within legal constraints.

- Policy Grant jurisdiction partners face a major challenge advancing equity in housing given the constraints posed by Prop 209, which prohibits race-based preferential treatment for public employment and contracting.
- Site teams are navigating this legal constraint by focusing on the structural frameworks that have led to displacement of, and limited housing opportunities for, BIPOC communities. For instance, Berkeley can ask questions such as “Were you displaced via imminent domain seizure?” or “Do you have a multi-generational history in this community?” allowing PBF partners to focus on affected communities.
- CBO partners such as Healthy Black Families that do not face the same legal constraints as local governments are able to complement those efforts by conducting narrower outreach through community building and advocacy training.

Preservation

Since there are multiple strategies available to address the issue of preserving affordable housing, Policy Grant site teams have been taking a holistic approach to their preservation work (i.e., looking at prevention more holistically than simply a single policy):

- As a regional entity, BAHFA focuses on funding efforts and streamlining tax exemption processes to support preservation efforts.
- The San José team is working to strengthen the local preservation ecosystem by providing capacity building to organizations that will be doing the acquisition and rehabilitation of unsubsidized affordable housing and educating council members on the preservation ecosystem in San José.
- The team in South San Francisco is advocating for preservation as part of a broader anti-displacement effort.

Some major issues these sites are encountering include a misunderstanding of what preservation entails and a lack of a solid underpinning to move preservation work forward.

INSIGHTS

#1: Establish the infrastructure for preservation.

Due to the complexity of engaging in preservation work, site teams are first taking a strategic step to set up the infrastructure required for preservation work to function effectively:

- For San José, the setup starts with building the capacity of organizations to take on preservation, followed by an NOFA with the actual funding for organizations to engage in preservation work.
- In South San Francisco, this infrastructure setup entails building a community-wide anti-displacement advisory board.

Preservation (Continued)

#1: Establish the infrastructure for preservation. (continued)

BAHFA is aiming to build the infrastructure for preservation through funding, which will benefit the Bay Area as a whole. As a new agency, BAHFA aims to set up internal mechanisms to ensure the efficient allocation of funds and due diligence processes once they issue an NOFA.

BAHFA's infrastructure work also includes mapping the regional capacity of organizations to take on preservation work and understanding the needs of preservation practitioners. This analysis will inform how to structure loans and projects within state guidelines.

#2: Building buy-in through education and community engagement.

Site teams have learned preservation is not well understood by the public in general. As a result, teams are focusing much of their energy on educating elected officials and the community at large.

To this end, the San José team is conducting extensive research that can help make the case for preservation work and is also planning a study session for SJCC.

Similarly, South San Francisco is prioritizing its community-wide outreach as part of its work for the anti-displacement task force.



Cross-Site Team Learnings

Cross-Site Team Progress

Site teams are making progress toward their policy goals across a number of work areas.

Since the start of 2023, Fellows have worked with their site teams to identify quantifiable indicators that would be useful to track over the time of the Policy Grant to measure progress. As a result of this participatory approach, not all site teams are capturing the same indicators. Our team combined the indicators common across most site teams. These indicators, taken alongside the qualitative data, represent what the Policy Grant sites themselves have identified as important measures of success on their policy journey.

Exhibit 2 shows indicators for community engagement and secured funding from the start of the Policy Grant through June 2023.

| EXHIBIT 2 Indicators as of June 2023 | | |
|---|--------------|----------------------|
| INDICATOR | TOTAL | # OF SITES REPORTING |
| # of policies/ordinances/measures passed or modified | 5 | 2 |
| # of community meetings | 76 | 9 |
| # of attendees at community meetings | 1,401 | 9 |
| # of housing units to be produced | 1,832 | 2 |
| # of housing units to be preserved | 50 | 1 |
| # of funding commitments secured | 21 | 4 |
| Amount of funding commitments secured (including Oakland’s NOFA awards to applications that have emerging developer partners) | \$65,394,000 | 3 |
| Amount of funding commitments secured (excluding Oakland’s NOFA awards to applications that have emerging developer partners) | \$394,000 | 3 |

Key Learnings

#1: Pivot strategically.

Many PBF site teams are making strategic shifts in their policy approaches. These shifts result from a need to counter opposition to specific policies, garner support, or as a reaction to changing political conditions.

Some sites are learning from previous policy setbacks in revising their approaches, with some success. One approach is to present specific policies as part of a broader approach to improve housing conditions.

“As we’re ... publicly discussing a hot button topic, trying to ... present it as one small tool within a toolbox of policies, so that it’s harder to push back against the one thing.”

– JURISDICTION PARTNER

POLICY SHIFTS

- After the COPA policy was rejected in San José, the Mountain View site team decided to make its COPA policy just one piece of a broader anti-displacement approach. Similarly, in South San Francisco, the site team is now looking at COPA as one element of a more comprehensive policy strategy focused on preservation because of San José’s experience.
- Given the failure of Measure V—the Transient Occupancy Tax—to pass during the first round of the Policy Grant, the EPA team instead pushed for a general tax (Measure L) that passed (70% yes) in November 2022. The team felt more confident a general measure fund would pass and that they would be able to earmark funds specifically for housing efforts.

#2: Focus on ‘little p’ policy wins.

Some site teams are making progress by narrowing down the scope of policies or focusing on administrative measures that are easier to adopt. This approach of ‘little p’ policies enables site teams to advance housing solutions by making small-scale changes that can have a big impact on long-term policy goals and build momentum for further changes that need to be decided at the council or ballot level.

“It’s not a wise or good use of our time to bring something really big and controversial through council. Not to say that ... we should stop doing important policy work, but more just that we have to be very strategic about what we take on.”

– FELLOW

‘LITTLE P’ WINS

Oakland is making strides towards its larger goal of supporting emerging BIPOC developers by passing administrative changes such as:

- Lowering the minimum years of experience for developers to participate in NOFA applications.
- Redefining the “emerging developer” definition to be more inclusive of BIPOC developers.
- Increasing the bonus points awarded to emerging developer applicants.
- Increasing developer fee cap for emerging developer applicants.

After COPA was turned down, the San José site team started focusing on moving forward with some preservation-focused activities that do not require a vote, including notice of funding availabilities, developing partnerships, and data analysis.

#3: Prioritize community engagement.

Engaging the community in drafting and advancing policies has been a top priority for site teams, with numerous community meetings held and a diverse range of participants involved.

Some site teams are strengthening their community base as they prepare to develop and introduce policies to garner support and proactively address potential opposition:

- The East Palo Alto site team has learned that despite its strong CBO partners conducting extensive public outreach and education, the opposition could show up with enough force to derail a policy.
- The Mountain View site team has held several interest group meetings with a variety of interest groups (e.g., tenant, nonprofit developers, and market-rate developers) as a way to reach agreements.

“[We are] making sure we are doing our due diligence to reach our constituents and the folks that we work with and prioritize in our mission—the folks least likely to be at the table when it comes to policymaking. Those are the voices that we want to make sure continue to participate.”

– CBO PARTNER

Some site teams have been very intentional in the voices they seek to provide input:

- Antioch has made efforts to reach community members who are unhoused and bring in voices of people with lived experience. The site is currently working on creating two formal committees through which partners and communities can voice their opinions.
- HACCC is intentionally reaching out to former Las Deltas residents.



Reflections

Reflections

#1: The impact of strategic shifts.

Making strategic pivots can have profound implications for the housing goals and objectives of sites. In subsequent evaluation cycles, we hope to deepen our understanding of how, where, and under what conditions strategic shifts do or do not alter each site's overall goals and objectives.

#3: Facilitate more regional collaboration.

A common theme across sites is the need for funding and the potential funding stream from a regional bond that could be issued by BAHFA next year if approved by voters, but it became clear throughout the focus groups that site teams are not currently working together to advocate for this bond. There is space for more regional coordination within the Policy Grant.

#2: Considering a longer policy grant timeline.

After reflecting on both successes and setbacks since the Policy Grant's inception, it's worth considering whether extending the grant's timeline would be beneficial. We are finding that, even if site teams pass a policy within the grant term, they do not have enough time within the grant term to implement that policy or see through the resulting changes. A longer grant period could provide more time for site teams to accomplish the many steps related to policy change, from garnering public support to implementing changes resulting from the new policies.

“It's more important that we disagree effectively than that we always agree. It's about being able to hear each other, understand where others are coming from, know what is going to happen, and try to figure out how to find the common ground.”

– GRANT REPORT



Detailed Site Policy Updates

Antioch

To inform modifications to both Antioch’s ADU and faith-based land micro-homes, the site team has continued to focus on community outreach and engagement through a robust set of listening sessions, large community meetings, and one-on-one conversations. After identifying an underrepresentation of Black and Latinx community voices (partly identified through indicators tracking set up for the Policy Grant evaluation), the site team has prioritized outreach efforts in majority-Black churches and within the Latinx community.

Now, the site team is shifting its focus to create two committees: (1) a Faith Leaders Advisory Committee that will extend past Antioch into East Contra Costa County and (2) a Community Voices Advisory Committee composed of residents and CBO partners. The latter, alongside the pre-existing Resident Empowerment Program, will aim to continue to promote dialogue between the community and local government.

The site team is driving toward a November 2023 council session to present its faith-owned land ordinance. One unexpected challenge is the bankruptcy of the Catholic Diocese in Oakland, which means the site team’s closest partner for a pilot faith-owned land micro-home no longer controls its land and cannot approve the pilot. The site team is exploring additional partnerships for faith-owned land pilot projects and with lending institutions to fund ADU loans.

POLICY GOALS

1. Leveraging unused faith-based organization land
2. Encouraging accessory dwelling units for low-income homeowners
3. Building community leaders and greater community-government dialogue

EXHIBIT 3 Antioch Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|---|-------|
| # of items presented to decision makers | 1 |
| # meetings with unhoused residents | 3 |
| # of different meeting methods/format | 7 |
| # of Resident Empowerment Program (REP) trainings | 33 |
| # of hours receiving training (e.g., storytelling, time management) | 37 |
| # of presentations REPs give to City government/decision-makers, faith leaders, other | 35 |
| # of homeowners who submit an ADU application | 50 |
| # of low-income homeowners who submit an application | N/A |
| Time and/or cost savings of low-income homeowners doing an ADU project (pre- and post-estimates from building department) | N/A |
| Comparison of attendance at community meetings with Antioch’s past efforts (low priority) | N/A |

Bay Area Housing Finance Authority (BAHFA)

During Cycle 2, the BAHFA site team has focused its efforts on research and early implementation of pilot programs related to their policy goals. BAHFA is preparing to launch a Notice of Funding Availability (NOFA) in Fall 2023 through the Regional Early Action Planning (REAP 2.0) program funded by the State of California. As a new entity, this has been an intensive process to coordinate with the California Department of Housing and Community Development (HCD) and set up internal processes to ensure loans can be made available quickly once applications are received. This is a new process the team did not expect to undertake at the time of the Policy Grant application.

Based on early engagements with preservation stakeholders in the region, BAHFA decided to prioritize its Welfare Tax Exemption work before embarking fully into plotting potential changes to allow preservation work to count toward Regional Housing Needs Allocation (RHNA) goals. Some research and analysis on the RHNA work has started, but BAHFA has focused more on supporting community partners in working with the Alameda County assessor’s office to streamline the Welfare Tax Exemption. Reducing the time it takes to receive the exemption supports preservation of small sites because it reduces the chances of large, unexpected property tax bills that should not exist given these sites actually qualify for the exemption.

The BAHFA Fellow and community partners have also started to map the local capacity in the region for preservation work. Together, BAHFA and its partners have attended or presented at over 50 convenings.

POLICY GOALS*

1. Regionally-networked preservation convenings
2. State legislative proposal to allow jurisdictions to count preserved units toward RHNA goals

EXHIBIT 4 BAHFA Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|------------------------------|
| # of convenings/presentations by BAHFA | 10 |
| # of convenings by community partners (Preservation Lab, People’s Land and Housing Alliance) | 13 |
| # of external convenings attended by grant partners (Oakland Property Acquisition Collaborative, Stable Homes Coalition) | 75 |
| # of different meeting methods/format | Hybrid (virtual & in person) |
| Completion of convening with REAP 2.0 recipients on program lessons learned | N/A |
| # of TA resources provided | N/A |
| # of meetings to inform Equity Framework | 2 |
| # of BAHFA informational presentations on Bond | 25 |
| # of meetings/interviews to determine feasibility | N/A |
| Successful endorsement by BAHFA/MTC/ABAG (if proposed) | 2 |
| # of supporters of the bill (if proposed) | N/A |

Berkeley*

Berkeley has continued work on the Equitable Black Berkeley (EBB) project, which is aligned with the Transit Oriented Development plan for the Ashby BART station and designed to repair harm to the Black community caused by institutional racism, segregation, and redlining. One success is the recent council decision to approve a right-to-return policy for the affordable housing component of the development that will give preference to individuals who were formerly displaced to access that housing. The right-to-return policy work started in the previous round of Policy Grants (the Challenge Grant). Meanwhile, Healthy Black Families has continued hosting People’s Assemblies to tell a cohesive narrative about what makes a thriving Black Berkeley.

The team has also been exploring funding options to support potential returning residents. In addition to parallel City-led efforts under this funding umbrella, the team has been exploring the creation of an Enhanced Infrastructure Financing District (EIFD) tied to the development at North Berkeley and is pursuing the creation of an Environmental, Social, and Governance (ESG) investment fund whose revenue would directly support Berkeley’s EBB project. The team has also submitted a grant to the Robert Wood Johnson Foundation in partnership with BART to increase community participation and voice in the development process. The goal is for this grant to open opportunities for future funding available through the Department of Transportation for reconnecting communities.

POLICY GOALS

1. Community-driven, equitable development at two BART stations, with supportive policies such as right-to-return and local preference
2. Innovative funding to raise \$500M for development at BART sites
3. Build a replicable model for reparative work

EXHIBIT 5 Berkeley Core Indicators as of June 2023**

| INDICATOR | TOTAL |
|---|---------------------------|
| # of policies/ordinances introduced | 3 |
| # of pilot projects | N/A |
| # of community meetings | 6 |
| # of community meetings with translation services or other accommodations | 6 |
| # of attendees at community meetings | 335 |
| # of interest groups engaged | 23 |
| # of housing units to be produced | 1800 |
| % of units reserved for affordable housing | Q1: 50% Q2: 35% to 50% |
| # of units to be preserved | N/A |
| # of funding secured/leveraged/commitments | 0 |
| \$ amount of funding secured/leveraged/commitments | N/A |
| # of city council/board of supervisors meetings with community participation (low priority) | N/A |

* This is Berkeley’s second PBF Policy Grant.

** All of Berkeley's indicators align with PBF's overall core indicators.

Housing Authority of Contra Costa County (HACCC)

After months of drafting and deliberating, the HACCC site team released the RFQ for the first phase of the Las Deltas property sale, completed the 90-day waiting period for applications, and is working with the selection panel to score applications and prepare to notify selected developers. The HACCC Board will approve the selection in Fall 2023. After developers have been notified, HACCC will begin a similar process for the market rate sale of properties. This work is challenging for HACCC in the absence of a Redevelopment Authority. The goal is for local developers to revitalize and develop the Las Deltas neighborhood, creating housing opportunities for current and former Las Deltas residents and displaced North Richmond residents.

The site team has begun to navigate the challenge of carefully mapping out all parcels and structures to comply with new regulations and reduce the fees nonprofit developers may have to pay to split those parcels and structures so they can be used for development.

Throughout this effort, the team has continued its outreach to former Las Deltas residents to gauge interest in returning to Las Deltas; they have reached 66% of former residents for whom they had contact information, of which 94% have said they are interested in returning.

The CBO partners have started to compile grant opportunities and are exploring avenues for the creation of a new MOU between North Richmond CBOs. Because the previous MOU between Richmond agencies is sunseting, development efforts in North Richmond are challenging. Establishing a new MOU has the potential to sustain work in North Richmond beyond the scope of the Policy Grant.

POLICY GOALS

1. Creating homeownership opportunities for Las Deltas residents, existing residents, and displaced North Richmond residents with community land trusts, co-ops, condos, and other models
 - a. A preference policy
 - b. Streamlining approvals for Las Deltas
 - c. Creating new financial instruments
2. MOU between Richmond CBOs

EXHIBIT 6 HACCC Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|---|-------|
| # of properties sold | N/A |
| # of concrete questions/suggestions asked by community members at meetings | 48 |
| % housing units produced that are affordable for longer than 20 years | N/A |
| % housing units produced that are affordable below 80% AMI | N/A |
| # of former Las Deltas residents contacted | 54 |
| % former Las Deltas residents contacted that are interested in returning | 94% |
| % or # of former Las Deltas residents contacted who could affordably purchase or live in the new properties developed | N/A |
| # of attendees at community meetings who live in NR & former Las Deltas | N/A |
| # of people engaging with Las Deltas updates at MAC meetings | 5 |
| # emails/calls with questions from the community to the fellow | 37 |
| conventional vs non-conventional sources of funding | N/A |
| # of standing/ad hoc committees where policy was presented/discussed | 13 |
| # of individuals receiving updated homeownership curriculum | 0 |

East Palo Alto*

The East Palo Alto site team continues working on a COPA policy, which requires much effort and time. This work started during the previous round of the Policy Grant (the Challenge Grant). The site team is finalizing a research report on the policy and is aiming to present the policy to the City Council for a vote in Fall 2023. The team has had to make several property type exemptions to move the policy forward and reduce opposition.

The site team is also making progress on other fronts, such as the successful approval in the November 2022 election of a gross receipts business tax on residential rental properties. Since the funds did not have explicit spending targets for housing, the site team has engaged with elected officials to figure out ways to allocate some funds toward housing. The City Council recently approved funds for housing programs: commitments of \$150,000 to produce a rental registry and \$100,000 for an emergency rental assistance program. The rental registry would provide detailed information on the property owner and rental properties.

Maintaining community engagement is a priority for East Palo Alto. For instance, the team is supporting a tenant network, with community partners offering know-your-rights trainings for renters at risk of eviction or displacement.

The team has made limited progress with cooperative ownership opportunities but plans to make more progress on this front in the near future.

- ### POLICY GOALS
1. Continued work on the city’s Opportunity to Purchase Act, including implementation and fund and resource development
 2. Co-op ownership opportunities
 3. Tenant network education and empowerment

EXHIBIT 7 East Palo Alto Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|-----------|
| # of new/modified ordinances/policies passed or adopted | 0 |
| # of policies/ordinances introduced | N/A |
| # of pilot projects (low priority) | N/A |
| # of community meetings | 6 |
| # of community meetings with translation services or other accommodations | 6 |
| # of attendees at community meetings | 290 |
| # of interest groups engaged (low priority) | 34 |
| # of housing units to be produced | 0 |
| % of units reserved for affordable housing | 0% |
| # of units to be preserved (low priority) | 0 |
| # of funding secured/leveraged/commitments | 3 |
| \$ amount of funding secured/leveraged/commitments | \$255,000 |
| # of city council/board of supervisors meetings with community participation | 1 |
| # of government standing/ad hoc committees with CBO participation | 0 |

* This is East Palo Alto’s second PBF Policy Grant.

Mountain View

Mountain View’s Fellow has conducted research into the region’s various COPA/TOPA policies and compiled a matrix of potential options for Mountain View to explore. The site team has increased their focus on local replacement requirements because SB 330 will sunset. The site team is planning back-to-back council meetings to discuss (a) local replacement requirements and (b) a broad anti-displacement response strategy including acquisition preservation work, funding, and introducing OPA program basics. The City’s housing element workplan includes the creation of a Community Ownership Plan to explore CLTs and other alternative ownership models. The OPA process will likely connect with the Community Ownership Plan efforts.

The Fellow is also working closely with Neba Films to document the transformation of the Crestview Hotel into permanent housing. This provides an opportunity to show the human side and the importance of affordable housing production in the Bay Area. The site team hopes to show this documentary widely at film festivals and affordable housing events.

Finally, while the technology sector’s investment and philanthropy efforts for affordable housing are cooling, the site team has been exploring ways to utilize potential BAHFA regional bond funds and updating the commercial linkage fee program to generate funding for housing.

POLICY GOALS

1. Develop a displacement response strategy, including an acquisition program, requirements for replacing demolished units, and evaluating other potential policies such as COPA/TOPA
2. Develop and implement a housing funding strategy, including new revenue sources for both acquisition preservation and new construction
3. Develop a “storytelling through journalism” outreach and messaging strategy

EXHIBIT 8 Mountain View Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|--------|
| # of new/modified ordinances/policies passed or adopted | 0 |
| # of policies/ordinances introduced | N/A |
| # of pilot projects | N/A |
| # of community meetings (engagement or education) (low priority) | 15 |
| # of community meetings with translation services or other accommodations (low priority) | 7 |
| # of attendees at community meetings (low priority) | 70 |
| # of interest groups engaged | 4 |
| # of housing units to be produced | N/A |
| % of units reserved for affordable housing | N/A |
| # of units to be preserved (MV to specify rehab or acquisition) | 50 |
| # of funding secured/leveraged/commitments | 0 |
| \$ amount of funding secured/leveraged/commitments | \$0.00 |
| # of city council/board of supervisors meetings with community participation | N/A |
| # of regional engagements (convenings or conversations) | 1 |

Oakland*

The Oakland site team is focused on supporting emerging developers in Oakland through a multi-pronged approach with support from the City’s elected officials.

First, the team is aiming to update the long-existing pre-development loan program so a more diverse set of applicants can benefit from it. This could involve setting aside funds for emerging developers, but the team is still working out the specific parameters.

Next, the Oakland team is working on ways to enable more partnerships with a more diverse set of emerging developers, given the constraints imposed by Prop 209, which prohibits preferential treatment based on race. To address these constraints, the City of Oakland has modified the policies in its Notice of Funding Availability (NOFA) programs. These modifications include lowering the number of years of experience required for developers to participate in an NOFA application, redefining the definition of “emerging developer” definition to be more inclusive of certain BIPOC developers, increasing the bonus points awarded to emerging developer applicants, and increasing the developer fee cap for emerging developer applicants.

Lastly, the site team is still planning to use tax-defaulted sites as a source for redevelopment, though this last prong has not been a top priority for the team.

POLICY GOALS

1. Promote policies and programs to support emerging BIPOC developers
2. Remove obstacles and systemic barriers for BIPOC affordable housing developers, while supporting a model that stimulates investment in historically underserved Oakland neighborhoods
3. Create and implement new policies and programs to build the pipeline of properties accessible to emerging developers (e.g., tax-defaulted properties)

EXHIBIT 9 Oakland Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|--------------|
| # of new/modified ordinances/policies passed or adopted | 4 |
| # of policies/ordinances introduced | N/A |
| # of pilot projects | 0 |
| # of community meetings (engagement or education) | 4 |
| # of community meetings with translation services or other accommodations | N/A |
| # of attendees at community meetings | 170 |
| # of interest groups engaged | 170 |
| # of housing units to be produced | N/A |
| % of units reserved for affordable housing (low priority) | 0% |
| # of units to be preserved | N/A |
| # of funding secured/leveraged/commitments | 15 |
| \$ amount of funding secured/leveraged/commitments | \$65,025,000 |
| # of city council/board of supervisors meetings with community participation | N/A |
| # of tax defaulted or foreclosed properties in pipeline | 0 |
| Increase in # of emerging developers who qualify for Oakland HCD loan/grant products | N/A |
| Codifications of new definitions | 2 |

* This is Oakland’s second PBF Policy Grant.

Richmond

The Richmond site team has successfully included both policy priorities in the City’s housing element and housing equity roadmap, ensuring the continuity of the work. The Fellow has also created an interactive web-based map of all vacant, abandoned, and tax-delinquent properties with an overlay of their public or private ownership status. The goal is to develop a foreclosure risk index and use the maps to inform the City’s future decisions to designate properties as surplus or exempt.

The site team developed a local public land disposition policy that aligns with the State Surplus Land Act. The site team is preparing the Public Land Policy Framework for a City Council Study Session before the end of the year and hopefully adoption in 2024. The CBO partner, Richmond LAND, has also initiated meetings with councilmembers to ensure the passage of the Public Land Policy and has engaged the community using the mapping tools to determine which surplus sites are of most value to residents.

POLICY GOALS

1. Implementing a community land policy package (Equitable Public Land Policy and Neighborhood & Land Stabilization Policy) that is based on input and feedback from various local stakeholder groups and sectors in Richmond
2. Establishing metrics, procedures, and appropriate resources needed to ensure the long-term sustainability of housing policy
3. Preserving existing affordable housing

EXHIBIT 10 Richmond Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|-----------|
| # of new/modified ordinances/policies passed or adopted | 0 |
| # of policies/ordinances introduced | 0 |
| # of pilot projects | 0 |
| # of community meetings | 14 |
| # of community meetings with translation services or other accommodations | 1 |
| # of attendees at community meetings | 61 |
| # of interest groups engaged | 3 |
| # of housing units to be produced | N/A |
| % of units reserved for affordable housing | N/A |
| # of units to be preserved | 0 |
| # of funding secured/leveraged/commitments | 2 |
| \$ amount of funding secured/leveraged/commitments | \$113,812 |
| # of city council/board of supervisors meetings with community participation | 0 |
| # of residents reached through other methods (e.g., phone calls, social media) | 91 |
| # of units with habitability issues / # of blighted properties | 283 |
| # of units at risk of foreclosure or tax default | 498 |
| # and type of data collection, analysis, and visualization | 6 |

San Francisco

The San Francisco site completed programming for the first cohort of the Bay Area Developers of Color Cohort, which included panels with cross-disciplinary real estate and land use experts, access to network events, and a mock NOFA process designed to provide participants with the skills and connections needed to navigate the City’s affordable housing development process.

The site team conducted interviews with cohort members to hear feedback on the program and make improvements for the second cohort. Applications for the second cohort closed in August 2023. In addition to recruiting and planning for the second cohort, the site team is also reviewing the City’s underwriting guidelines to understand the extent to which equity is addressed and what shifts can be made to further advance equity in this process. This process also ties in with the City’s Racial Equity Committee that has been working with all City departments on a cohesive review process. In August 2023, the site’s Fellow transitioned out of the partnership*. SFF and the City are currently assessing how to structure the remainder of the grant.

POLICY GOAL

1. Develop a set of recommendations for the city’s request for proposals process, underwriting guidelines, and other internal processes to support emerging/existing BIPOC developers based on the learnings from the developers of color cohort

EXHIBIT 12 San Francisco Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|---|-------|
| # of meetings with Developers of Color Cohort members for feedback | 23 |
| # of cohort teams to participate in mock NOFA and complete it | 4 |
| # of city departments engaged to serve cohort | 13 |
| # of equity initiatives evaluated | 4 |
| # of equity initiatives with process improvements suggested/implemented | 4 |
| # of equity related NOFAs/RFPs released | 1 |
| # of meetings to inform Equity Framework | 23 |
| # of BAHFA informational presentations on Bond | 4 |

* A new Fellowship Associate was hired in November 2023 to support the San Francisco site team.

San José*

On the heels of their previous anti-displacement plan and state policy wins, San José’s original policy goal was to pass a COPA policy. In April 2023, after years of community engagement, City Council hearings, and policy drafts, the San José City Council voted down the COPA policy to the dismay of community supporters and site team.

The site team has now shifted its focus to building the preservation ecosystem overall and making the case broadly for the need for alternative stewardship models and affordable housing. To that end, the team has been doing research and analysis on preservation in San José which will be the basis for a report presented in Spring 2024 and project managing a study session on the Three Ps of affordable housing for SJCC in early Fall 2023. The site team continued preparing a capacity building NOFA for release in Q4 2023.

The site team recognizes the need for more education generally about preservation and preservation strategies and hope to engage community, interest groups and organizations, and elected officials during the remainder of the grant while pushing for moderate administrative changes to support the ecosystem.

POLICY GOAL

1. Build out San José’s local preservation ecosystem.**

EXHIBIT 11 San José Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|---|-------|
| # of new/modified ordinances/policies passed or adopted | 0 |
| # of policies/ordinances introduced | 1 |
| # of pilot projects | N/A |
| # of community meetings | 5 |
| # of community meetings with translation services or other accommodations | 5 |
| # of attendees at community meetings (low priority) | 121 |
| # of interest groups engaged | 174 |
| # of housing units to be produced | N/A |
| % of units reserved for affordable housing | N/A |
| # of units to be preserved | N/A |
| # of funding secured/leveraged/commitments | 1 |
| \$ amount of funding secured/leveraged/commitments | \$0 |
| # of city council/board of supervisors meetings with community participation | 2 |
| # of changes responsive to the input of community members & stakeholders who are most impacted by displacement or displacement risk | 4 |
| # of discussions with decision-makers where voice of community members who are most impacted by displacement is heard/presented | 20 |
| # of pro-policy media placements (e.g., blog posts, opinion pieces) | 3 |
| # of CBOs and stakeholders that endorse a policy | 51 |
| # of community members who testify at public meetings (low priority) | 357 |
| # of reports or official government documents that reference community meetings or community input (low priority) | 3 |

* This is San José’s second PBF policy grant.

** Updated after San José City Council voted down the COPA policy.

South San Francisco

South San Francisco was initially interested in exploring COPA/TOPA more deeply within its suite of anti-displacement tools and presented an initial memo to Council in April 2023. However, the recent San José City Council decision to reject the policy along with the overall complexity of the policy has led South San Francisco to de-prioritize its COPA/TOPA efforts. Instead, the site team has been ramping up its community engagement work by trying to build a task force for anti-displacement more generally. The team is in the early stages of developing an RFP to engage firms that can lead the facilitation of the task force. The site team has been intentional in who it invites into the task force and has sought to avoid including individuals employed at different interest groups such as Realtors Associations or even organizations like the team’s community partner, Housing Leadership Council (HLC).

South San Francisco’s community advocacy around housing is not as developed as other sites. Thus, part of the Policy Grant work inherently involves building that advocacy infrastructure. The Fellow—who started in June 2023 after the previous Fellow accepted a position with the City of South San Francisco—along with the HLC have been engaging in outreach efforts. HLC has been preparing for Know Your Rights campaigns and the Fellow has been visiting sites where evictions are happening to learn more about the situation.

POLICY GOALS*

1. Exploring legislation options for requiring smaller multi-family owners to offer their housing stock first to affordable housing providers
2. Partnership programs between the City and affordable housing providers to acquire, rehabilitate, and deed restrict naturally occurring affordable housing
3. Adopt an affordable housing spending plan

EXHIBIT 13 South San Francisco Core & Unique Indicators as of June 2023

| INDICATOR | TOTAL |
|--|-------|
| # of new/modified ordinances/policies passed or adopted | 0 |
| # of policies/ordinances introduced | N/A |
| # of pilot projects | N/A |
| # of community meetings | 1 |
| # of community meetings with translation services or other accommodations | 1 |
| # of attendees at community meetings | 30 |
| # of interest groups engaged | 1 |
| # of housing units to be produced | N/A |
| % of units reserved for affordable housing | N/A |
| # of units to be preserved | 0 |
| # of funding secured/leveraged/commitments | 0 |
| \$ amount of funding secured/leveraged/commitments | \$0 |
| # of city council/board of supervisors meetings with community participation | 0 |
| # of standing/ad hoc committees where policy was presented/discussed | 0 |
| # of discussions with decision-makers where community voice is heard/presented | 0 |
| # of comments at public meetings | 0 |

*South San Francisco did not discuss their original policy goals during the focus group. We will explore these policy goals during the final cycle of data collection to understand if the work has shifted, but also expect input may be limited since the Fellow in South San Francisco only recently started in the job.



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