

Attachment J



Orange County | Housing
Finance
Trust

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SOUTHERN CALIFORNIA

**Proposal for
State Legislative
Advocacy Services**

October 19, 2021

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October 19, 2021

Adam Eliason, Manager, Orange County Housing Finance Trust
1 League #62335
Irvine, CA 92602

Dear Mr. Eliason:

Thank you for the opportunity for Townsend Public Affairs, Inc. ("TPA") to submit our proposal for State Legislative Advocacy Services to the Orange County Housing Finance Trust ("Trust").

Since its inception in 1998, TPA has earned the reputation as **Champions for Better Communities** by providing the experience, resources, and relationships expected from a premier legislative advocacy and grant writing firm while also giving clients the unique brand of customer service they deserve: personal attention, maximum accessibility, and passion for their mission.

Our strategic approach to advocacy and funding is tailored to meet the individual needs of each client by leveraging the breadth and depth of our team as well as our vast network of relationships with key stakeholders and decision makers.

Utilizing this method on behalf of our clients, TPA has shepherded over 100 legislative and regulatory proposals into law, and secured over \$2.2 billion in grants from state, federal, and local government agencies as well as nonprofit foundations and private companies.

Contact information during the proposal evaluation period:

- Cori Takkinen, Vice President
- TPA Southern California Office: 1401 Dove Street, Suite 330, Newport Beach, CA 92660
- (949) 399-9050, CTakkinen@TownsendPA.com

This proposal will remain valid for a period of 120 days from the submittal date. TPA will NOT partner with a subcontractor to provide state legislative advocacy services to the Trust.

Thank you again for your interest in our firm and your consideration of this proposal. Please contact us if you have any questions or need additional information. We would be honored to serve the Orange County Housing Finance Trust.

Yours truly,



Christopher Townsend



CONFLICTS OF INTEREST

Attachment 3

Conflict of Interest Disclosure Statement

Disclosure Policy

It is the policy of the Trust to ensure that firms and individuals providing services to the Trust are not subject to organizational conflicts affecting their objectivity or their ability to provide impartial assistance or advice to the Trust. This form requires certain relationships to be disclosed to the Trust so that it may determine whether a potential organizational conflict exists and whether mitigation measures may be implemented so as to allow the firm or individual to perform services notwithstanding such potential conflict. Relationships with the following entities must be disclosed:

- 1) Any firm, individual, partnership, corporation, association, or other legal entity currently retained for services by a developer of affordable housing or service provider for families and individuals at risk of or experiencing homelessness.
- 2) Any firm currently retained or which may be retained for services by the County of Orange or any member city of the Trust or other public entity within Orange County, California (see list of member agencies below).

Disclosure

- 1) _____ Consultant **IS NOT** currently retained for services as defined in the Disclosure Policy above.
- 2) Consultant **IS** currently retained for services as defined in the Disclosure Policy above.

a) Consultant is retained for services by the following member agencies of the Trust

<input type="checkbox"/> County of Orange	<input type="checkbox"/> City of Lake Forest
<input type="checkbox"/> City of Aliso Viejo	<input checked="" type="checkbox"/> City of Laguna Beach
<input checked="" type="checkbox"/> City of Anaheim	<input type="checkbox"/> City of Laguna Hills
<input checked="" type="checkbox"/> City of Buena Park	<input type="checkbox"/> City of Laguna Niguel
<input checked="" type="checkbox"/> City of Costa Mesa	<input checked="" type="checkbox"/> City of La Habra
<input type="checkbox"/> City of Dana Point	<input checked="" type="checkbox"/> City of Mission Viejo
<input type="checkbox"/> City of Fountain Valley	<input checked="" type="checkbox"/> City of Newport Beach
<input checked="" type="checkbox"/> City of Fullerton	<input type="checkbox"/> City of Orange
<input type="checkbox"/> City of Garden Grove	<input checked="" type="checkbox"/> City of Placentia
<input checked="" type="checkbox"/> City of Huntington Beach	<input type="checkbox"/> City of San Juan Capistrano



City of Santa Ana
 City of Stanton

City of Tustin
 City of Westminster

b) Consultant is retained for services by the following other public agencies and public or private entities within Orange County, California. (List individually.)

See attached list.

c) Please describe briefly those services potentially affected by this Disclosure:
TPA provides advocacy and funding services to the public agencies and public or private entities listed in this disclosure.

Consultant is required to disclose to the Trust, in writing, any services relationship which may be entered into during the term of the Contract, which violates or appears to violate the intent of this Disclosure:

Townsend Public Affairs

Consultant

10/8/2021

Date

Christopher Townsend

Authorized Repetitive

President

Title



In addition to the members agencies of the Trust identified on page 4, TPA provides advocacy and/or funding services to the following entities in Orange County:

- City of Brea
- City of Irvine
- East Orange County Water District
- Midway City Sanitary District
- Orange County Sanitation District
- Yorba Linda Water District
- Coast Community College District
- Rancho Santiago Community College District
- Discovery Science Foundation
- Pacific Symphony



PROPOSAL REQUIREMENTS

PROVIDE A BRIEF PROFILE OF THE FIRM, INCLUDING THE TYPES OF SERVICES OFFERED; THE YEAR FOUNDED; FORM OF THE ORGANIZATION (CORPORATION, PARTNERSHIP, SOLE PROPRIETORSHIP); NUMBER, SIZE AND LOCATION OF OFFICES; AND NUMBER OF EMPLOYEES.

TPA is a state and federal legislative advocacy and grant writing firm that provides lobbying and funding services to public agencies and nonprofit organizations throughout California.

- Founder/Owner/President: Christopher Townsend
- Advocacy Success: Shepherded **over 100** client-sponsored legislative proposals into law
- Funding Success: Over **\$2.2 billion** in state, federal, and local government grants as well as grants from nonprofit organizations and private companies
- Longevity: 23 years (founded in 1998)
- Organization: Type “C” Corporation
- Number of Employees: 17
- Number of Registered Lobbyists: 13
- Number of Offices: Five
 - TPA State Capitol Office, Sacramento
 - TPA Federal Office, Washington, DC
 - TPA Southern California Office, Newport Beach
 - TPA Central California Office, Fresno
 - TPA Northern California Office, Oakland
- Areas of Specialization:
 - Local Governance (Cities, Counties, Special Districts)
 - Housing and Economic Development
 - Transportation Policy and Infrastructure
 - Water and Sanitation Policy and Infrastructure
 - Education Policy and Infrastructure
 - Parks and Community Facilities (Recreational, Cultural, Historical)
 - Energy, Environment, and Natural Resources
 - Public Safety
 - Budget and Finance



DESCRIBE HOW THE FIRM PROPOSES TO STAFF THIS CONTRACT.

With a team of 13 registered state lobbyists, TPA has the breadth and depth of experience AND the ability to deploy as many advocates as needed to maximize success for the Trust while minimizing the burden on Trust staff. TPA proposes a dedicated a team of five people to perform state legislative advocacy services on behalf of the Trust:

1. **Cori Takkinen**
Vice President
Project Manager

2. **Casey Elliott**
Vice President

3. **Niccolo De Luca**
Vice President

4. **Christopher Townsend**
President

5. **Eric O'Donnell**
Senior Associate
Deputy Project Manager

IDENTIFY THE PRINCIPALS WHO WILL BE ENGAGED IN THE DAY-TO-DAY ACTIVITIES FOR THE TRUST, THEIR CURRENT ASSIGNMENTS, LEVEL OF COMMITMENT TO THOSE ASSIGNMENTS, AVAILABILITY FOR THIS ASSIGNMENT, AND HOW LONG EACH PERSON HAS BEEN WITH THE FIRM.

TPA Vice President Cori Takkinen and TPA Senior Associate Eric O'Donnell will be engaged in the day-to-day activities for the Trust. Cori has been with TPA for over 10 years and Eric has been with TPA for over six years. Both Cori and Eric will oversee the Trust's contract, including managing each of the key personnel on the proposed team and their work for the Trust.

Cori has both the required expertise and capacity to work with the Trust to achieve success. Cori's current client portfolio includes:

- City of Anaheim
- City of Brea
- City of Buena Park
- City of Irvine
- City of La Habra
- City of Newport Beach
- City of Mission Viejo
- Discovery Science Foundation
- Flagship Facility Services



Eric has both the required expertise and capacity to work with the Trust to achieve success. Eric's current client portfolio includes:

- City of Avalon
- City of Chino Hills
- City of Huntington Beach
- City of Laguna Beach
- City of Placentia
- City of Stanton
- East Orange County Water District
- Orange County Sanitation District
- Yorba Linda Water District

PROVIDE EDUCATION, EXPERIENCE AND APPLICABLE PROFESSIONAL CREDENTIALS OF PROJECT STAFF. FURNISH BRIEF RESUMES (NOT MORE THAN TWO PAGES EACH) FOR THE PROPOSED PRINCIPALS AND PROJECT STAFF WHO WILL WORK ON THE PROJECT.

Brief resumes, which outline key staff experience, education, and tenure at TPA, can be found on the following pages.





Cori Takkinen, Vice President: Cori brings 12 years of legislative advocacy and public policy experience to TPA. Cori has extensive experience writing grants for various local, regional, state, and federal opportunities. Cori has expertise in the policy sectors of transportation, water resources, infrastructure, sanitation, local governance, parks and recreation, and economic development.

Townsend Public Affairs, Inc.
Vice President

2011-Present

Throughout her tenure at TPA, Cori has been responsible for securing millions in competitive grant funds for local public agency clients. In addition to her expertise on municipal and water infrastructure issues, Cori has a strong network of relationships with State Legislators, key staff, and various state agencies. Some of Cori's accomplishments include the following:

- Cori has had extensive success securing funding in the State budget process for Orange County clients. In the FY 2021-22 State Budget, Cori worked with 8 municipal clients in Orange County and 2 nonprofit clients to secure **\$16.4 million** in budget earmarks for priority projects. In addition, in FY 2019-20 State Budget, Cori worked with 5 municipal clients and 1 nonprofit client to secure **\$20.2 million** in budget earmarks for priority projects, including funding for a stormwater treatment facility, historical renovations, park and trail improvements, fire prevention, and children's science education.
- Leveraging relationships with the State Legislature, Cori secured an earmark in the FY17-18 State Budget in the amount of **\$20 million** to form the North Orange County Public Safety Task Force. This Task Force will serve six TPA clients: the cities of Anaheim, Brea, Buena Park, Fullerton, Placentia, and Stanton. These cities will be able to facilitate regional collaborative efforts to combat homelessness, youth violence, and other critical public safety issues in the region. Cori worked with these cities to secure an additional **\$7.8 million** in the FY21-22 budget to continue North Orange County Public Safety Task Force activities.
- Cori worked with the City of Santa Ana to secure a direct funding allocation in the FY 2018-19 State Budget in the amount of **\$4 million** to upgrade water infrastructure within the City. TPA worked with the City's legislative delegation, staff from the Assembly and Senate Budget Committees, and the Department of Finance to ensure funding was included in the State Budget for this critical project to allow the City's water customers to have real-time access to their water usage, which will help facilitate water conservation and reduce customers' utility bills.
- Cori worked with the Orange County Water District and the Orange County Sanitation District to sponsor AB 2022 (Gordon). The bill allowed for limited bottling of the highly treated and recycled GWRS water for educational purposes. The bill was the first legislation in the nation that allowed for the direct bottling of advanced treated recycled water. TPA secured bi-partisan support for the legislation and it was signed into law.
- Worked closely with the State Legislature and Administration on the development and implementation of **Proposition 68, the California Drought, Water, Parks, Climate, Coastal Protection, and Outdoor Access For All Act of 2018**. Cori worked in support



of a variety of clients to create specific funding opportunities to achieve desired results. In addition to securing funding opportunities for municipalities, Cori’s efforts with Proposition 68 resulted in **\$4.8 million** to fund a conservation program at West Coyote Hills in Fullerton as well as **\$3.46 million** to fund science education at the Discovery Cube Orange County.

- Cori has been actively engaged in State fire prevention legislation to reduce the risk of fires caused by above ground utilities as well as to provide opportunities for local jurisdictions located in high fire hazard severity zones to receive priority for fire mitigation measures.
- Cori worked with the City of Brea to secure over **\$10 million** from local, state, and federal sources for the Tracks at Brea project. The project is a four-mile multi-use rail to trail project that will traverse the City. Funding sources include: the US Environmental Protection Agency, California Natural Resources Agency, Strategic Growth Council, California Transportation Commission, and the Southern California Association of Governments.

County of Orange, Board of Supervisors
Policy Advisor for Supervisor John Moorlach

2010

Cori served as a policy advisor for, then-County of Orange Supervisor (and who is now a Senator in the State Legislature). Cori was responsible for research, analysis, and subsequent recommendations of all policy issues relating to Orange County Public Works as well as state and federal legislation. Cori served as a liaison between the Supervisor and County staff, constituents, and community groups.

Tom Campbell for US Senate Campaign

2010

Chapman University, Orange, CA
Master of Public Administration

2014

Claremont McKenna College, Claremont, CA
Bachelor of Arts Economics and Government with Leadership Sequence

2011





Casey Elliott, Vice President: Casey brings 20 years of legislative and public policy experience to TPA. Casey develops and implements legislative strategies for local public agency clients throughout California. Casey maintains relationships with key members and staff of the State Legislature, the Administration, and select state agencies. Casey has expertise in the policy sectors of municipal finance, budget, redevelopment, education, local governance, water resources, parks and recreation, and cultural resources.

Townsend Public Affairs, Inc.
Vice President

2006-Present

As Vice President, Casey oversees a team of 13 TPA lobbyists registered with the California Secretary of State. Casey provides timely expert analysis of legislative and budget proposals introduced each legislative session for their potential effect on TPA clients. Some of Casey’s accomplishments include:

- Working with the City of Oakland and the City of Santa Ana, Casey helped advance legislation and state budget requests to secure funding for California’s largest cities to help address issues surrounding homelessness. These efforts culminated in the creation of the Homeless Emergency Aid Program (HEAP). Approved as part of the 2018 state budget, HEAP provided a \$500 million block grant program designed to provide direct assistance to cities and counties to address the homelessness crisis. HEAP contained a specific pot of funding for large cities, including a combined \$12.3 million for Oakland and Santa Ana.

Building on the success of the HEAP program, in 2019 the State Budget created the Homeless Housing, Assistance and Prevention (HHAP) Grant Program, a \$650 million grant that provides local jurisdictions with funds to support regional coordination and expand or develop local capacity to address their immediate homelessness challenges. The HHAP program maintained dedicated funding for California’s largest cities, including a combined \$28.1 million for the cities of Oakland and Santa Ana.

- Casey worked closely with the City of Lafayette to establish a small business assistance program to help local businesses and non-profits lessen the economic impacts from the coronavirus. Casey was able to work with the City to promote the program, work directly with program participants to connect them with available state and federal resources, and work with businesses to secure funding. Ultimately, the small business assistance program worked with nearly 100 small businesses, which employed nearly 400 workers, and were able to secure over \$1.5 million in direct funding for the businesses.
- Through his work with the Department of Finance, the Legislature, and the Office of the Governor, Casey has been able to lessen the impact of RDA dissolution on TPA clients. Specific outcomes include: having over **\$35 million** in projects in Santa Ana, Lafayette, Brea, and Hayward recognized as enforceable obligations; facilitating accelerated transfer of former RDA assets in Buena Park to allow for new development; and the passage of legislation to allow expenditure of certain development agency bond proceeds.
- Casey helped the Newhall County Water District co-sponsor SB 634 (Wilk) which established a new water district to serve as the primary water wholesaler and retailer for



the Santa Clarita Valley. Casey coordinated efforts with the other impacted water agencies and stakeholders to develop a coalition of local support for the legislation. The legislation, which contained the enabling act for the new district as well as provisions that allowed for a modified LAFCO process, was approved by the Legislature and signed into law by Governor Brown.

- Casey helped the Rancho Santiago Community College District and Coast Community College District secure over **\$68 million** in funding through the State Budget for three capital outlay facilities projects. Casey worked with the districts’ legislative delegation, budget committee staff, and the Community College Chancellor’s Office to advocate for the priority budget items, including having the projects recommended for funding by the Board of Governors of the California Community Colleges. The funding for these three projects will allow for the design and construction of three new buildings that will provide state of the art learning environments for community college students in Orange County.

Assemblyman Tom Umberg

Legislative Assistant

2006

Casey managed legislation for the Member, including education, workers’ compensation, and school facilities measures. Casey staffed the Member on the Assembly Education committee. He also worked closely with legislative staff, committee consultants, state agencies, and interested parties on legislation. In addition, he advised the Member and Chief of Staff on pending legislation.

Secretary of State

Legislative Coordinator

2005-2006

Casey briefed the Secretary of State and senior staff members on legislation affecting the agency. Casey worked with Division Chiefs, senior staff members, and the Secretary of State to develop legislative positions for the agency. Casey also worked with Department of Finance, state agencies, and other interested parties on issues that affected the Secretary of State. In addition, he researched and drafted legislative proposals for the agency.

Secretary of State

Legislative Analyst

2003-2005

Casey assisted in the research and development of legislation. In addition, Casey worked closely with the State Legislature, Governor’s Office staff, committee consultants, Department of Finance, state agencies, and other interested parties on issues that affected the Secretary of State. Some of Casey’s special projects included staffing various taskforces, assisting in the development of spending plans for legislatively mandated programs, and election-night support.

Office of the Governor

Senior Legislative Assistant

2000-2003

Casey chaptered all bills that the Governor signed and he processed all vetoed measures. Casey worked closely with the Secretary of State, Chief Clerk of the Assembly, and the Secretary of the Senate throughout the bill chaptering process. Casey also supervised a staff of 10 personnel during the creation and assembly of up to 1500 bill files presented to the Governor.

University of California, Davis

Bachelor of Arts, Political Science

2000





Niccolo De Luca, Vice President: Niccolo brings 24 years of legislative and public policy experience to TPA. Niccolo has expertise in the policy sectors of local governance, parks and recreation, public safety, natural resources, cultural resources, cannabis, and consumer affairs.

Townsend Public Affairs, Inc.
Vice President

2008-Present

Throughout his tenure at TPA, Niccolo has been responsible for dozens of legislative proposals that have been signed into law and secured millions in competitive grant funds for local public agency clients. In addition to his public policy expertise, Niccolo has widespread bi-partisan relationships with Members and staff of the State Legislature, Governor Newsom Administration, and relevant agencies. Some of Niccolo’s accomplishments include:

- Niccolo led the TPA efforts to secure **\$33.1 million** in critically needed park funding for cities and nonprofits in the Bay Area, Central Valley, and Southern California. These efforts included working on the funding guidelines, drafting the applications, lobbying for the applications, and working hand in hand with the funding agency. Niccolo was the team lead and instrumental in the many victories of our clients.
- Niccolo, in recognizing the need for additional tools to protect public and private infrastructure from natural disasters such as earthquakes, championed legislation to allow cities to create a special assessment district to provide low-cost earthquake retrofit loans in areas with vulnerable housing stock. In addition, Niccolo worked with the City of Oakland and the City of Los Angeles to create the first ever state loan program for seismic retrofits of multi-unit buildings.
- Niccolo was a major part of the coalition to help pass the state’s first ever medicinal cannabis regulatory framework legislation. A comprehensive, thorough approach to statewide medicinal cannabis guidelines has been needed for several years. Niccolo served as an instrumental member of the statewide coalition that supported the views of both local government and the industry. Niccolo actively drafted language and advocated with legislators and staff to ensure statewide regulations would be in the best interest of cities. Due to these efforts, Niccolo has been recognized as a policy expert on cannabis policy and has testified before numerous legislative committees on issues related to the statewide implementation of cannabis regulations.
- Niccolo assisted the City of Oakland in securing **\$2.2 million** in State Budget earmarks in FY14 and FY16. Niccolo coordinated with the Oakland Mayor, State Legislature, Governor’s Office, and appropriate Administration officials to draft the language for inclusion into both budgets. Niccolo’s strategy and execution led to two significant financial wins for the City and their various public safety efforts.
- Niccolo worked closely with the City of Oakland to secure four grants in the combined amount of **\$18.9 million** from the Community Oriented Policing Services (COPS) Hiring Program. Niccolo developed the applications and shepherded them through the grant



process, including leveraging relationships with the US Department of Justice and COPS staff, which resulted in critical federal funding for the City to hire additional police officers.

- Niccolo worked with the City of Emeryville to secure **\$600,000** in federal funding from the Pre-Disaster Mitigation Grant Program to finance the cost of seismic retrofitting of the City’s one and only emergency community gathering and housing facility. Niccolo worked closely with the City and Congresswoman Barbara Lee on the application as well as development and execution of an advocacy strategy, including the defeat of a hostile amendment that would have taken the grant away from Emeryville and reverted the funds back to FEMA.

City of Oakland

Deputy City Administrator

2004-2007

Niccolo was responsible for the daily operations and decision making for the two largest departments (public works and police department), overseeing a combined annual budget of \$323 million. Niccolo also directly supervised four different divisions with 45 employees.

Niccolo provided direct organizational leadership to create a standard operating procedure for a multi-faceted crime reduction initiative, which was adopted by the City Council and resulted in crime reduction. Additionally, Niccolo expanded the number of organized neighborhood public safety gatherings for three consecutive years, with an average of nearly 100 percent annual increase. Furthermore, Niccolo served as lead administrative staff member for three City Council committee, providing expertise and support to the Mayor and City Council in the formulation, interpretation, and application of public policy.

City of Oakland

Assistant Director, Public Works Agency

2001-2004

Niccolo was responsible for three divisions of the public works department (including finance and human relations), five direct reports, and 40 staff members. Niccolo oversaw the financial operations of the entire public works department, including revenues and expenditures. Niccolo implemented procedures to reduce the number of worker’s compensation claims subsequently adopted for the entire City.

Niccolo also served as the spokesperson of the public works department and maintained all media relations. Niccolo built strong media relations and served as hearing officer for union grievances, ultimately helping to improve key relationships with affected unions.

City of Oakland

Assistant to Councilmember Richard Spees

1998-2001

Niccolo served as lead spokesperson for the Council Member within the district. Niccolo improved the overall district-wide public approval rating of the Council Member through grass roots marketing campaigns and new information dissemination strategies. Additionally, Niccolo led constituent services for the district, ensuring proper and efficient service delivery for 58,000 residents.

University of Oregon

Bachelor of Arts, American History

1997





Christopher Townsend, President: Christopher founded TPA in 1998 and has 40 years of experience in public affairs, legislative advocacy, and grant writing. Christopher and TPA have represented over 315 clients, including 235 local public agencies, such as cities, counties, transportation agencies, water and sanitation districts, elementary and secondary school districts, community college districts, park and recreation districts, and other special districts, as well as nonprofit organizations.

Townsend Public Affairs, Inc.
President

1998-Present

Christopher provides leadership to a team of 13 advocates and grant writers while managing the development and implementation of strategies for the agendas of each client. His achievements include:

- Under Christopher’s leadership, TPA has become one of the most successful advocacy firms in California (and is continually recognized as a “top ten” firm registered with the California Secretary of State) while still providing the personalized attention and focus of a small boutique firm.
- Under Christopher’s leadership, TPA has shepherded **over 100** legislative and regulatory proposals into law over a wide range of policy areas, including local governance, water and sanitation, transportation, housing and economic development, parks and natural resources, historical and cultural resources, elementary and secondary education, higher education, and public safety. The bipartisan capabilities of the firm are evidenced by legislative and funding successes over the tenure of several federal and state administrations, including: President Bill Clinton, George W. Bush, Barack Obama, Donald Trump, and Governors Pete Wilson, Gray Davis, Arnold Schwarzenegger, Jerry Brown, and Gavin Newsom.
- Christopher and his team have secured over **\$1.8 billion** in local, regional, state, and federal government grants as well as private and nonprofit grants for a multitude of legacy projects in the policy sectors of water and sanitation, transportation, education, housing and economic development, parks and natural resources, historical and cultural resources, and public safety.
- Christopher and TPA have participated in the development and implementation of several California bond propositions for the statewide ballot to provide capital funding for major infrastructure projects, including water and sanitation, transportation, education, housing and economic development, parks and natural resources, and historical and cultural resources, including Propositions 1, 1B, 1C, 1D, 1E, 12, 13, 14, 40, 47, 50, 55, 68 and 84. Most recently, Christopher worked closely with the State Legislature and the Governor’s office on the drafting of SB 5 (De Leon), which authorized a **\$4 billion** park bond that was approved on the November 2018 statewide ballot as Proposition 68.
- In 1999, Christopher was appointed by Assembly Speaker Antonio Villaraigosa to serve on the Speaker’s Commission on State and Local Government Finance.



- In 1997, Christopher was appointed by Assembly Speaker Cruz Bustamante to serve on the California Film Commission.

PepsiCo/Taco Bell Corp., Irvine, CA
Senior Director, Government & Community Affairs 1992-1998

Christopher managed and directed government and media relations, crisis management, internal communications, and marketing publicity. Christopher also managed the political action committee for state and federal political races. Additionally, Christopher managed community relations initiatives, corporate philanthropy, and the Taco Bell Foundation.

Stein-Brief Group, Inc., Dana Point, CA
Vice President, Public Affairs 1982-1992

Christopher directed government, community, and media relations at the level, state, and federal levels, including the management of all political, civic, charitable, and cultural activities. Christopher provided land-use planning and entitlement process analysis for domestic and international projects. Christopher also managed activities with numerous state and federal agencies to ensure compliance with all applicable laws and regulations governing land use. Finally, Christopher created and directed a political action committee that supported various local, state, and federal candidates and ballot initiatives.

JFK School of Government, Harvard University, Cambridge, MA
Master of Public Administration 1991

Claremont McKenna College, Claremont, CA
Bachelor of Arts, Political Science, Magna cum Laude, Political Science Honors Prize 1982

Coro Fellow
Southern California 1981

Harry S Truman Scholar
California 1980





Eric O'Donnell, Senior Associate: Eric brings six years of experience in local governance and grant writing to TPA. Eric has been responsible for major grant awards on behalf of public agency clients. Eric has a strong network with both staff and members of the state and federal legislatures as well as relationships with local Southern California municipalities. Eric has expertise in the policy sectors of wastewater, water resources, natural resources, local governance, parks and recreation, and transportation.

Townsend Public Affairs, Inc.
Senior Associate

2015-Present

Since joining TPA, Eric has worked with numerous public agencies to secure grant funding for water and sanitation policy and infrastructure, natural resources, and parks and recreation. Some of his accomplishments include:

- Eric worked with the Orange County Sanitation District to secure a **\$1 million** grant award from the Department of Water Resources' Integrated Regional Water Management Grant Program to replace a critical sewer line. Eric worked closely with staff at the Orange County Sanitation District, the Department of Water Resources, and the Santa Ana Watershed Project Authority throughout the development and implementation of the grant program.
- Eric worked with the City of Avalon to secure a direct funding allocation in the FY 2019-20 State Budget in the amount of **\$500,000** to remove and replace single-walled underground fuel storage tanks with safer and more durable double-walled underground fuel storage tanks. Eric worked closely with the City's legislative delegation as well as legislative staff from the Assembly and Senate Budget Committees as well as the Speaker and Senate Pro Tem's offices to ensure that the funding was included in the FY 19-20 State Budget for the City of Avalon to complete this critical environmental protection project. This funding will allow the City's marine fuel dock in the harbor to continue operating and will provide a critical resource for the community.
- Eric helped the East Orange County Water District secure a **\$500,000** grant from the Drought Response Program, administered by the U.S. Bureau of Reclamation. The funding allowed East Orange County Water District to construct a new drinking water well in order to provide safe, clean, and affordable drinking water to the District's retail customers. Due to the prevalence of PFAS/PFOA in existing groundwater resources, the District needed new sources of reliable and affordable drinking water.
- Eric was critical in facilitating a resolution to a Redevelopment Dissolution related issue for the City of Stanton that resulted in the City receiving **over \$2.1 million** in loan repayment. Eric worked closely with the City, the City's legislative delegation, and executive staff from the Department of Finance to identify a solution. The favorable resolution resulted in the Department of Finance approving a previously denied line item on the City's Recognized Obligation Payments Schedule (ROPS), thus awarding the City a loan repayment.



- Eric helped the City of Fountain Valley secure a **\$226,000** grant from the Active Transportation Program, administered by the Southern California Association of Governments and the California Transportation Commission. The funding allowed the City to build ADA accessible pedestrian curb ramps within neighborhoods that are located near five elementary and middle schools in the Fountain Valley School District and the Ocean View School District. The project will provide greater mobility for the public and improve the safety of the City's routes to local schools.

City of Brea

Community Services Senior Leader

2009-2015

Chapman University, Orange, CA

Masters of Public Administration

2020

California State University, Fullerton

Bachelor of Arts, Business Administration, General Management

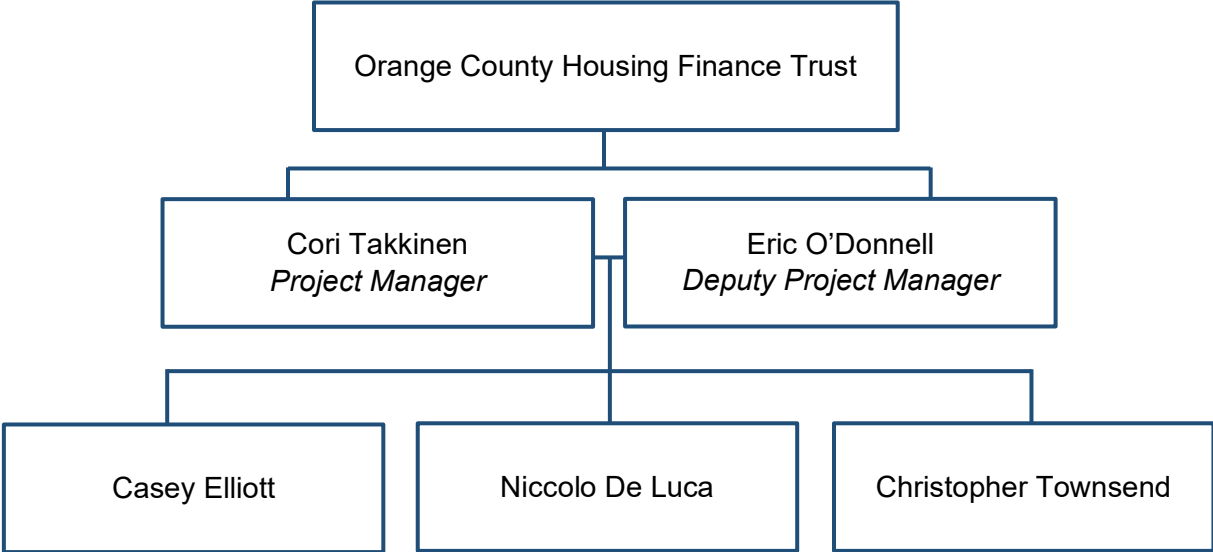
2014



IDENTIFY SUBCONTRACTORS, IF ANY, BY COMPANY NAME, ADDRESS, CONTACT PERSON, TELEPHONE NUMBER AND PROJECT FUNCTION. DESCRIBE PROPOSERS EXPERIENCE WORKING WITH EACH SUBCONTRACTOR.

TPA will NOT partner with a subcontractor to provide state legislative advocacy services to the Trust.

INCLUDE THE FIRM'S ORGANIZATION CHART, CLEARLY DELINEATING THE COMMUNICATION/REPORTING RELATIONSHIPS AMONG THE FIRM'S PROPOSED STAFF AND THE TRUST.



INCLUDE A STATEMENT THAT THE PRINCIPALS AND KEY PERSONNEL WILL BE AVAILABLE TO THE EXTENT PROPOSED FOR THE DURATION OF THE PROJECT ACKNOWLEDGING THAT NO PERSON DESIGNATED AS “KEY” TO THE PROJECT SHALL BE REMOVED OR REPLACED WITHOUT THE PRIOR WRITTEN CONCURRENCE OF THE TRUST.

The principals and key personnel included in this proposal will be available to the extent proposed for the duration of the project. No one designated as “key” to the project shall be removed or replaced without the prior written concurrence of the Trust.



DESCRIBE THE FIRM'S EXPERIENCE IN PROVIDING LEGISLATIVE ADVOCACY AND CONSULTING SERVICES TO JOINT POWERS AUTHORITIES AND ON HOUSING RELATED ISSUES.

TPA has extensive experience advocating for housing issues on behalf of our public agency clients throughout California. TPA has secured the passage of multiple housing related bills by leveraging our relationships with key stakeholders, including:

- The Governor's office
- Members of the California Legislature
- Senate Housing Committee
- Senate Governance and Finance Committee
- Assembly Housing Committee
- Assembly Local Government Committee
- Department of Housing and Community Development
- California Housing Finance Agency
- Other relevant state agencies and departments
- Multiple affordable housing developers
- Multiple affordable housing nonprofit organizations

TPA has worked to create funding opportunities for projects related to housing, giving local public agencies and nonprofit organizations the support they need to turn their vision into legacy. In total, TPA has worked with our clients to secure over \$419.3 million in competitive funding for housing related projects.

TPA has successfully advocated for housing related projects which support the mission of the Trust to strengthen communities by financing the development of affordable housing for homeless and low-income individuals and families. Notably, TPA has supported this mission working with various clients statewide to secure resources, promote good housing policy, educate the public, and support the construction, preservation, and protection of affordable homes as the foundation for stronger communities with thriving individuals, families, and neighborhoods.

Additionally, TPA has worked with a number of joint powers authorities throughout California to advance legislative policy relating to housing, economic development, transportation and infrastructure, water resources, and parks and recreation.



DESCRIBE THE FIRM'S EXPERIENCE IN PERFORMING SERVICES OF A SIMILAR NATURE TO THAT SOLICITED IN THIS RFP AND HIGHLIGHT THE PARTICIPATION IN SUCH SERVICES BY THE KEY PERSONNEL PROPOSED FOR ASSIGNMENT TO THIS PROJECT.

The following examples demonstrate TPA's experience performing services of a similar nature to those outlined in the Scope of Services beginning on page 3 of the RFP:

Administrative, Statutory, and Regulatory Efforts

TPA has experience sponsoring legislation related to agencies administrative, statutory, and regulatory efforts. The following examples outline specific legislation relating to these efforts that TPA advocated for and shepherded into law:

- In 2014, TPA sponsored SB 946 (Huff) on behalf of the **Orange County Sanitation District (OCSD)**. The bill sought to amend the OCSD District Act by modifying the governing board of the district. This modification reflected an agreement between the City of Yorba Linda (City) and the Yorba Linda Water District (YLWD), which provided that the YLWD would assume all responsibility and liability for the lateral sewer lines within the City's boundaries. In coming to this agreement, the two entities also determined it would be appropriate to transfer governing board representation from the City to the YLWD. TPA secured bi-partisan support for the legislation and it was signed into law. ***Cori Takkinen and Casey Elliott worked on this project on behalf of the Orange County Sanitation District.***
- In 2016, TPA sponsored SB 927 (Anderson) on behalf of the **Fallbrook Public Utilities District**. The bill allowed the District to change its governance structure where directors were elected at-large, to a format where directors are elected from specific voting districts. The legislation ensured that the governing structure of Fallbrook PUD was in compliance with the California Voting Rights Act. The bill was supported by numerous stakeholders in the water industry, as well as voting rights organizations such as MALDEF. TPA secured bi-partisan support for the legislation and it was signed into law. ***Casey Elliott worked on this project on behalf of the Fallbrook Public Utilities District.***
- In 2016, TPA sponsored AB 1757 (Waldron) on behalf of the **North County Transit District**. The bill ensured that compensation for North County Transit District Board Members would be commensurate with that of other regional and transportation entities. TPA secured bi-partisan support for the legislation and it was signed into law. ***Christopher Townsend provided strategic support to TPA Senior Director Richard Harmon, who worked on this project on behalf of the North County Transit District.***
- In 2017, TPA co-sponsored SB 634 (Wilk) on behalf of the **Newhall County Water District**. The bill established a new water agency (a merger of Newhall County Water District and Castaic Lake Water Agency) to provide wholesale and retail water service to the Santa Clarita Valley. The bill, which was the culmination of work between NCWD and the Castaic Lake Water Agency, allowed for the unification and modernization of water management and delivery while improving service and saving millions of dollars for the community. TPA worked closely with local representatives, numerous policy committee members, and other stakeholders, and ultimately secured bi-partisan support for the legislation and it was signed into law. ***Casey Elliott and Eric O'Donnell worked on this project on behalf of the Newhall County Water District.***



Orange County Housing Finance Trust Legislative Platform

TPA has experience drafting legislative platforms on behalf of dozens of our municipal and public agency clients, which address their statutory, regulatory, legislative, and administrative goals. TPA has drafted legislative platforms for cities including, but not limited to, Fullerton, Laguna Beach, Brea, Mission Viejo, and the Orange County Sanitation District. Each year TPA works with these agencies to update the platform, provide new information and edits related to key priorities in Sacramento, and ensure that the document remains concise, accurate, and relevant.

General Liaison and Advocacy Activities

TPA is one of the largest advocacy firms in California and is continually recognized as a “top ten” firm registered with the California Secretary of State. Founded in 1998 by Christopher Townsend, **TPA has provided customized legislative and funding advocacy for 300 public agencies throughout the State of California.**

Through years of hard work and a focus on customer service, TPA has built a strong reputation in Sacramento as effective legislative advocates. TPA’s strong relationships with senior professional staff provide a two-way dialogue allowing TPA clients access to voice their concerns and provide information on developing and proposed legislation. TPA works hand in hand with clients to develop and promote new legislative proposals that advance priorities and solve issues facing clients. TPA will monitor, analyze and prioritize legislation, as well as develop a legislative strategy that is specifically tailored to the Trust.

TPA has been successful with shepherding **over 100** client-sponsored pieces of legislation into law under different administrations including: Governors Davis, Schwarzenegger, Brown, and Newsom. Additionally, TPA protects clients against harmful legislation by working to defeat bills or crafting solutions to fix bills. This balanced and comprehensive approach TPA has utilized to secure these victories will be leveraged on behalf of the Orange County Housing Finance Trust.

In addition to legislative advocacy, TPA utilizes its relationships with lawmakers and agency officials to resolve regulatory issues for clients. Earlier this year, TPA was approached by a city in Orange County to help resolve several issues with HCD. Despite being approved by HCD, the city had not received its Permanent Local Housing Allocation payments from the State. Additionally, the city sought a waiver from HCD in order to more effectively provide homeless individuals with critical services while reducing staff time for administering those services. TPA immediately engaged Senator Dave Min, its contacts at HCD, drafted letters, and set meetings with key decision-makers. After advocating to HCD, TPA successfully secured the waiver from HCD and the city received its Permanent Local Housing Allocation payment.

On a separate occasion, TPA assisted an Orange County city client with an issue regarding the Surplus Land Act (AB 1486, Ting) guidance that was recently released from HCD. The city was seeking an exemption from one of the provisions of the guidance to allow a project to move forward. TPA again engaged its legislative and agency contacts, worked with city staff and their legal team, put together memorandums, and crafted an advocacy strategy for the city. After several meetings and phone calls with HCD, TPA successfully resolved the issue for the city by



acquiring approval from HCD so the city can move forward with its project in compliance with the recent guidance.

Additionally, TPA works with its clients and agencies even after achieving legislative and funding wins to continually remove undue burdens. For instance, TPA secured **\$5 million** in HCD CalHOME funding for one of its housing clients, Affordable Community Living Corporation (ACL). After securing this funding, TPA has been assisting ACL with HCD’s post-award requirements, including reporting requirements, performance reports, financial documentation, compliance and funding disbursement, as well as program administration. Additionally, TPA serves as ACL’s HCD liaison in order to reduce staff time on the organization while advocating for a more streamlined reporting process.

TPA will proactively engage with the Orange County Delegation to advocate for the Trust’s priorities. TPA will work closely with the entire Delegation to educate them on the Trust’ legislative and funding priorities.

DESCRIBE THE EXPERIENCE OF THE PRINCIPALS AND KEY PERSONNEL IN WORKING WITH THE STATE LEGISLATURE AND LEGISLATIVE ACCOMPLISHMENTS IN THE PAST SIX YEARS. PROVIDE SAMPLES OF PROJECTS AND PROGRAMS.

Each of the proposed key personnel has extensive experience working with the State Legislature. A sample of TPA’s legislative accomplishments in the past six years are included below:

- In 2018, TPA has worked closely with staff from the City of Oakland and the City of Santa Ana, as well as the Big 10 Mayors Coalition, to establish a funding source for local governments to address issues related to homelessness. The Big 10 Mayor effort, which began as specific legislation, led to the creation of the Homeless Emergency Aid Program (HEAP). The HEAP program was established in the 2018-19 State Budget as a \$500 million block grant program designed to provide direct assistance to cities and counties to address the homelessness crisis throughout California. The HEAP funds may be used for homeless prevention activities, criminal justice diversion programs for homeless individuals with mental health needs, services for homeless youth, and emergency aid. The program includes three separate pots of funding; two of which, totaling \$350 million, provide funds to local Continuums of Care, and the other provides \$150 million in funding directly to the largest eleven cities in California, including \$3.69 million for Santa Ana and \$8.67 million for Oakland. ***Casey Elliott and Niccolo De Luca worked on this project on behalf of the Cities of Santa Ana and Oakland.***
- In 2016, TPA sponsored AB 2031 (Bonta) on behalf of the City of Oakland. TPA organized a coalition of community groups and other stakeholders to support this legislation, which authorized any city or county to pass an ordinance to issue bonds for construction of affordable housing. The legislation also empowered the City to rapidly address the growing affordable housing crisis in Oakland. The measure, which was jointly authored by Assembly Member Bonta and then-Assembly Member Toni Atkins, successfully passed the Legislature and was signed into law by Governor Brown. ***Niccolo De Luca worked on this project on behalf of the City of Oakland.***



- TPA worked with several clients in Orange County to establish the **North Orange County Public Safety and Homelessness Task Force** through the State Budget. The Task Force was originally comprised of six cities but has since expanded to include ten cities: Anaheim, Brea, Buena Park, Cypress, Fullerton, La Habra, La Palma, Placentia, Stanton, and Yorba Linda. The FY19-20 State Budget provided the Task Force with **\$20 million** in funding (over four years) to coordinate and fund programs that: address youth violence prevention; to promote and enhance the successful reentry of offenders into the community; and address homeless outreach and intervention efforts. TPA advocated for an extension in funding for the Task Force in the FY21-22 State Budget and the coalition was successfully awarded an additional **\$7.8 million**. **Cori Takkinen and Eric O'Donnell worked on this project on behalf of a coalition of Orange County cities.**
- TPA played a major role in the coalition to help pass groundbreaking legislation that kept a major East Bay employer from leaving the state while creating new jobs and building affordable housing. AB 734 (Bonta) California Environmental Quality Act: Oakland Sports and Mixed-Use Project established special procedures for California Environmental Quality Act (CEQA) review, additional conditions for certification, and expedited judicial review for a proposed baseball park and mixed-use development in the City of Oakland at the Howard Terminal site. TPA efforts included, but were not limited to, working closely with multiple policy committee staffers, meeting with the offices of Senate and Assembly Members, working with the Construction and Building Trades to support the bill, working with East Bay legislative leaders and other associations to support the bill, and other efforts. **Niccolo De Luca worked on this project on behalf of the coalition and the City of Oakland.**
- TPA co-sponsored SB 595 (Beall) on behalf of the **Transbay Joint Powers Authority**. This legislation was required for the implementation of Regional Measure 3 (RM3) by authorizing an increase in the amount of the tolls for state-owned toll bridges as a means to generate the regional revenue required to fund projects that address the severe traffic congestion problems in the Bay Area. The traffic choke points are especially acute in the corridors of the seven state-owned toll bridges that are critical east-west and north-south arteries that bind the greater Bay Area together. RM3, which was approved on the June 2018 ballot, posed the question to Bay Area voters of whether to raise tolls as a means to address worsening traffic congestion, and was supported by a broad spectrum of stakeholders, including TPA clients, allies, and friends in the State Legislature.

TPA was an active participant in the advocacy strategy and efforts for SB 595 as early as 2016 because RM3 was a key priority for several of our municipal clients in the Bay Area. TPA secured and protected designated expenditures in SB 595 for TPA client-supported projects totaling \$375 million. **Niccolo De Luca and Christopher Townsend worked on this project on behalf of the Transbay Joint Powers Authority.**

- TPA worked with the City of Oakland on the renewal and expansion of their Enterprise Zone into Berkeley and Emeryville. TPA worked with the Office of the Mayor, Redevelopment Staff, and the California Housing and Community Development (HCD) to seek support, approval, and direction on the renewal of Oakland's Enterprise Zone status and then the subsequent expansion of the boundaries into neighboring Berkeley and Emeryville. **Niccolo De Luca worked on this project on behalf of the City of Oakland.**



- TPA sponsored AB 2022 (Gordon) on behalf of the Orange County Water District and the Orange County Sanitation District to promote the Groundwater Replenishment System (GWRS) project. The bill allowed for limited bottling of the highly treated and recycled GWRS water for educational purposes. The bill was the first legislation in the nation that allowed for the direct bottling of advanced treated recycled water. TPA worked closely with the Governor's Office, Assembly and Senate policy committees, and the State Water Resources Control Board to address any concerns with the direct bottling of GWRS water. TPA was ultimately able to secure bi-partisan support for the legislation and it was signed into law. ***Cori Takkinen and Casey Elliott worked on this project on behalf of the Orange County Water District and Orange County Sanitation District.***



IN NOT MORE THAN FIVE PAGES, DESCRIBE YOUR FIRM'S SUCCESS IN REPRESENTING PUBLIC AGENCIES AND OTHER CLIENTS.

TPA's proven advocacy methods have generated significant legislative and funding victories on behalf of our clients. The passage of measures spans a variety of subject areas including, but not limited to, housing and economic development, transportation and infrastructure, public works, public safety, parks and recreation, and water. The following brief points outline our success in representing public agencies and other clients:

- Longevity: **23 years** of experience (founded in 1998)
- Clients Served: **Over 300** local public agencies and nonprofit organizations
- Advocacy Success: Shepherded **over 100** client-sponsored legislative proposals into law
- Funding Success: **Over \$2.2 billion** in state, federal, and local government grants as well as grants from nonprofit organizations and private companies
- Ranking by Revenue Reported to the California Secretary of State:
 - 7th of 486 Firms Registered for 2019-20 Legislative Session
 - 98th Percentile

Tables detailing out legislative and funding successes on behalf of public agencies and other clients are included on the following pages.



LEGISLATIVE ADVOCACY ACHIEVEMENTS

Policy Sector	Issue	Description
Local Governance	Local Control and Finance	<ul style="list-style-type: none"> Public Facilities and Finance Public Employee Programs Contractual Assessment Programs Infrastructure Financing Opportunities
	Public Employee Benefits	<ul style="list-style-type: none"> PEPRA Compliance JPA Benefits Medical Benefits Vesting
	Cannabis	<ul style="list-style-type: none"> Drafting Local and State Cannabis Regulations Local Control
Housing and Community Development	Affordable Housing	<ul style="list-style-type: none"> Developing Funding for Affordable Housing Expanding Affordable Housing Eligibility
	Economic Development	<ul style="list-style-type: none"> Capital Investment Incentive Program Expansion Enterprise Zone Program Regulations Military Base Re-Use Land Planning
	Redevelopment	<ul style="list-style-type: none"> Agency Dissolution Process Developing Post-RDA Funding Sources State Liability Reduction
Transportation	Local Streets and Roads	<ul style="list-style-type: none"> State Highway Relinquishments Local Venue Signage on State Highways
	State Highway System	<ul style="list-style-type: none"> State Bond Funding for Highway Projects Expansion of Toll Lanes/Toll Roads
Water and Sanitation	Water Quality	<ul style="list-style-type: none"> Drinking Water Public Health Regulations Groundwater Pollution Liability Groundwater Management Plans Direct/Indirect Potable Reuse
	Water Infrastructure	<ul style="list-style-type: none"> State Bond Funding for Water Projects Local Reliability Projects Water Conservation Programs
	Sanitation Infrastructure	<ul style="list-style-type: none"> Integrated Regional Watershed Projects Advanced Water Treatment Facilities
Recreation and Natural Resources	Park Facilities	<ul style="list-style-type: none"> Joint-Use Projects with Schools Districts State Bond Funding for Local Park Projects (Propositions 11, 68, and 84)
	Greenhouse Gas Reduction	<ul style="list-style-type: none"> TOD Housing to Support Cap and Trade Objectives Increase Transit Accessibility for Active Transportation
Cultural and Historical Resources	Cultural Facilities	<ul style="list-style-type: none"> CA Cultural and Historical Endowment CA Nature Education Facilities Program
Public Safety	Public Health	<ul style="list-style-type: none"> Air Pollution Reduction Methods Treatment of the Remains of a Deceased Veteran Resources
	Crime Reduction	<ul style="list-style-type: none"> Sex Trafficking Control Gun Control
	Local Law Enforcement	<ul style="list-style-type: none"> Increasing Local Police Presence/COPS Police Body Cameras Regional Public Safety Task Force Initiatives
Education	Community College Districts	<ul style="list-style-type: none"> Veterans Resources Alternative Energy Job Training ADA Reform
	K-12 School Districts	<ul style="list-style-type: none"> K-12 Safety Planning Programs Joint Use Projects with Civic Agencies
	School Facilities	<ul style="list-style-type: none"> Charter School Facilities Funding Community College Facilities Funding K-12 School District Facilities Funding

A DETAILED SCHEDULE OF OUR STATE, FEDERAL, AND LOCAL LEGISLATIVE ADVOCACY ACHIEVEMENTS CAN BE PROVIDED UPON REQUEST



FY 2021-22 STATE BUDGET EARMARKS

This table provides an overview of the direct budget allocations secured on behalf of our clients from the 2021-22 State Budget. TPA worked closely with our clients to identify priority projects for each funding request. TPA then worked with members of the Assembly and Senate Budget Committee, as well as the Governor’s Administration, to ensure our client’s projects were included in the final budget approved by the Legislature.

Client Name	Project	Amount Awarded
City of Costa Mesa	Regional Fire and Rescue Facility Improvements	\$2,500,000
City of Del Mar	Del Mar Fairgrounds Operating Shortfall	\$3,500,000
City of Emeryville	Affordable Housing Site Remediation	\$2,500,000
City of Farmersville	Fire Engine Acquisition	\$750,000
City of Fremont	Mission Boulevard Interchange Modernization Project	\$7,200,000
City of Fullerton	Hunt Library Restoration	\$2,750,000
	Homelessness Recuperative Center	\$4,000,000
City of Half Moon Bay	Carter Park Renovation Project	\$4,750,000
City of Hayward	Hayward Navigation Center	\$662,000
	South Hayward Youth Family Center Project	\$1,000,000
City of Irvine	Bommer Canyon Fire Prevention Efforts	\$1,000,000
City of Lafayette	Safe Pathway for Children Trail	\$238,000
City of Modesto	Infrastructure Improvements to County Islands	\$5,000,000
City of Oakland	Oakland Fund for Public Innovation for the California Entrepreneurship Capital in the Community Initiative	\$8,000,000
	Local Jurisdiction Assistance for Cannabis Equity Program	\$9,905,020
	Oakland MACRO Project	\$10,000,000
	Port of Oakland Freight and Passenger Enhancements	\$280,000,000
City of Pismo Beach	Public Safety Communications Equipment	\$470,000
City of Reedley	Olson/Kings River Sewer Main Replacement	\$2,800,000
City of San Leandro	Memorial Park Rehabilitation Project	\$2,750,000
City of San Pablo	Alternative Policing and Mental Health Program	\$2,000,000
City of Santa Ana	Youth Facilities Improvements	\$4,000,000
City of South San Francisco	Vehicle License Fee Adjustment	\$3,000,000
City of Tracy	Multi-Generational Recreation Center	\$5,000,000
City of Tustin	New Emergency Backup Generator	\$1,500,000
Discovery Science Foundation	Discovery Cube of Orange County Re-Opening Operating Expenses	\$2,040,000
	Discovery Cube of Los Angeles Re-opening Operating Expenses	\$2,600,000
North Orange County Public Safety Task Force	North Orange County Public Safety Task Force Extension	\$7,800,000
TOTAL FY 2021-22 STATE BUDGET EARMARKS		\$377,715,020



FY 2019-20 STATE BUDGET EARMARKS

This table provides an overview of the direct budget allocations secured on behalf of our clients from the 2019-20 State Budget. TPA worked closely with our clients to identify priority projects for each funding request. TPA then worked with members of the Assembly and Senate Budget Committee, as well as the Governor’s Administration, to ensure our client’s projects were included in the final budget approved by the Legislature.

Client Name	Project	Amount Awarded
City of Agoura Hills	Stormwater Treatment Project	\$1,000,000
City of Avalon	Underground Fuel Tank Removal and Replacement	\$500,000
City of Buena Park	Historical Renovations	\$500,000
City of Costa Mesa	Lions Park	\$1,000,000
City of Dinuba	Water Well Replacement	\$1,000,000
City of Huntington Beach	Multi-Use Blufftop Path	\$1,700,000
City of Laguna Beach	Laguna Canyon Road Fuel Modification	\$1,000,000
City of Oakland	Public Safety Projects	\$4,000,000
	Bus Services	\$1,000,000
City of Selma	Storm Drain, Storage and Recharge	\$1,500,000
Discovery Cube of Los Angeles	Natural Resources Pavilion	\$5,000,000
Discovery Cube of Orange County	Property Acquisition/Parking Structure	\$10,000,000
East Contra Costa Fire Protection District	Equipment, Vehicles, and Facilities Acquisitions and Improvements	\$500,000
North County Transit District	Del Marr Bluffs Stabilization Project	\$6,130,000
Tri Valley Cities Coalition	Dublin Sports Grounds All Abilities Playground	\$1,400,000
TOTAL FY 2019-20 STATE BUDGET EARMARKS		\$36,230,000



GRANT FUNDING ACHIEVEMENTS

This table provides an overview of our grant funding achievements on behalf of our clients from state, federal, and local government agencies as well as private and nonprofit grant programs.

These amounts represent grants secured through a competitive and/or legislative process and do NOT include any funds awarded to clients via formulas or related forms of funding entitlements.

Policy Sector	State Funding	Federal Funding	All Sources
Housing and Development	\$694.3 Million	\$5.0 Million	\$699.3 Million
Water and Sanitation	\$126.6 Million	\$7.7 Million	\$134.4 Million
Parks, Recreation, and Natural Resources	\$123.3 Million	\$6.2 Million	\$129.5 Million
Transportation	\$558.4 Million	\$101.7 Million	\$660.1 Million
Education	\$247.9 Million	\$44.8 Million	\$292.7 Million
Cultural Resources	\$119.9 Million	\$10.3 Million	\$130.2 Million
Public Safety	\$91.5 Million	\$55.3 Million	\$146.8 Million
TOTAL	\$1.962 Billion	\$231.0 Million	\$2.193 Billion

A DETAILED 20-PAGE SCHEDULE OF OUR STATE, FEDERAL, AND LOCAL GRANT FUNDING ACHIEVEMENTS CAN BE PROVIDED UPON REQUEST



LIST THE MEMBERS OF THE STATE LEGISLATURE, PARTICULARLY THOSE WITHIN THE ORANGE COUNTY DELEGATION WITH WHOM THE PRINCIPALS AND KEY PERSONNEL HAVE A PROFESSIONAL RELATIONSHIP AND DESCRIBE EACH RELATIONSHIP.

Over the years, TPA has developed an extensive network of relationships with members and staff in the California State Legislature, which allows TPA to provide our clients with the most up-to-date information on state legislative and regulatory activities. TPA’s strong relationships with senior professional staff provide a two-way dialogue allowing TPA clients access to voice their concerns and provide information on developing and proposed legislation.

TPA enjoys close relationships with the following Members and agency leadership:

- **Orange County Legislative Delegation:**

- **Senator Bob Archuleta**

Christopher has a long-standing relationship with Senator Archuleta. Cori has worked closely with Senator Archuleta and the City of Buena Park on issues related to Department of Finance and the North Orange County regional homeless shelter.

- **Senator Pat Bates**

Christopher’s relationship with Senate Minority Leader Bates dates back to 1983 (35 years) when Senator Bates was a member of the Laguna Niguel Community Council and Christopher was the Director of Public Affairs for Stein Brief Group, a land development company working on entitlements for their Monarch Beach project. Additionally, Cori previously served with the Senator on the Board of Directors of the California Women’s Leadership Association. Christopher and Cori have worked with the Senator on numerous client projects during her tenure on the Laguna Niguel City Council and the Orange County Board of Supervisors, as well as in the state legislature as member of the Assembly and Senate.

- **Senator Josh Newman**

Cori and Eric worked closely with Senator Newman to create and secure funding for the North Orange County Public Safety Task Force, which has been expanded from its original structure to include the North SPA. In addition, both Cori and Eric have worked closely with Senator Newman on a number of State budget priorities as well as legislative priorities for cities in North Orange County

- **Senator David Min**

Christopher’s relationship with Senator Min began when he was running for the State Senate and has grown during his first year in office. Christopher, Cori, and Eric have worked closely with Senator Min on priority items for the Cities of Laguna Beach, Huntington Beach, Costa Mesa, and Tustin. Most recently, Cori worked closely with Senator Min’s office and the City of Tustin to receive a favorable ruling



from HCD in order to resolve an issue related to an interpretation of the surplus land act.

- **Senator Tom Umberg**

TPA State Capitol Director Casey Elliott’s relationship with Senator Umberg dates back to 2006 when Casey served as then Assembly Member Umberg’s legislative assistant. Casey has since worked closely with Senator Umberg and the cities of Anaheim, Huntington Beach, Orange, and Santa Ana on issues related to parks and recreation, local governance, active transportation, and education.

- **Assembly Member Cottie Petrie-Norris**

Christopher, Cori, and Eric have worked closely with Assembly Member Petrie Norris since she was elected in 2018. Cori worked closely with the Assembly Member during the first several months of her term to secure several million dollars in the FY 18-19 State Budget for the Cities of Costa Mesa and Huntington Beach. In addition, Cori and Eric have worked closely with the Assembly Member on fire prevention and mitigation measures for the City of Laguna Beach as well as on housing policy priorities for the Cities of Laguna Beach, Huntington Beach, and Costa Mesa. Most recently, Cori worked with Assembly Member Petrie Norris to secure a \$1,000,000 earmark in the FY 20-21 budget junior bill for the City of Irvine.

- **Assembly Member Sharon Quirk-Silva**

Christopher and TPA’s relationship with Assembly Member Sharon Quirk-Silva dates back to 2004 when she was a member of the Fullerton City Council and the City hired TPA to serve as their state advocate. During her tenure on the Fullerton City Council, Sharon worked closely with Christopher on several important projects, including the Fullerton Fox Theatre and West Coyote Hills. Sharon also served on the Board of Directors of the Orange County Sanitation District (another TPA client for state advocacy services) and worked with TPA. Since joining the State Assembly, Sharon has worked with Christopher, Cori, Eric and TPA on a number of projects affecting Fullerton, as well as the North Orange County, Rancho Santiago, and Coast Community College Districts, which combined represent several Orange County cities, including Anaheim, Santa Ana, Garden Grove, Westminster, Costa Mesa, Fountain Valley, and Huntington Beach, and the Orange County Sanitation District which represents 20 cities in Orange County.

- **Assembly Member Philip Chen**

Cori and Eric work closely with Assembly Member Chen on behalf of several TPA clients located in his district, including the cities of Placentia, Brea, and Chino Hills, on issues related to public safety, gang violence, services for the homeless, local tax issues and the preservation of open space. Cori and Eric have worked with the Assemblymember on sponsored legislation and on funding requests.



○ **Assembly Member Steven Choi**

TPA’s relationship with Assembly Member Choi dates back to 2009 when he was a member of the Irvine City Council and the City retained TPA as their state lobbyist. During his tenure on the City Council, TPA worked with Steven and the City to secure \$500,000 in funding for the restoration and transformation of the Historic Airplane Hanger as a component of the reuse plan for El Toro Marine Corp Air Station.

○ **Assembly Member Tom Daly**

Christopher’s relationship with Assembly Member Daly dates back to 1983, when they would play weekend pick-up basketball games at the Savannah High School gym in Anaheim. When the Assembly Member became the Mayor of Anaheim, he hired Christopher and TPA as the City’s state advocate, to secure funding for a variety of city projects, including the Haskett branch of the Anaheim Public Library System, the West Anaheim Youth Center, and the Tiger Woods Learning Center. TPA ultimately secured over \$10 million for those projects. During his tenure as Orange County Clerk-Recorder, the Assembly Member hired TPA to secure funding from the State of California for the Orange County Archives project. Since joining the state legislature, the Assembly Member has worked with TPA on behalf of numerous client projects in Anaheim and Santa Ana.

○ **Assembly Member Laurie Davies**

Cori has interacted with Assembly Member Davis from her tenure on the Laguna Niguel City Council and continues to work with her office on behalf of the City of Mission Viejo.

○ **Assembly Member Janet Nguyen**

Christopher and Cori’s relationship with Assembly Member Nguyen began when the Assembly Member served as a County of Orange Supervisor and continued when Assembly Member Nguyen was in the State Senate. Cori and Eric have worked closely with the Assembly Member on policy issues in Huntington Beach related to Huntington Harbour.



- **Governor’s Administration and Agency Leadership:**

- Governor Gavin Newsom
 - Executive Secretary Jim DeBoo
 - Cabinet Secretary Ana Matosantos
 - Senior Counselor and Director of Intergovernmental Affairs Jason Elliott
 - Chief Deputy Legislative Secretary Joey Freeman
 - Assistant Legislative Deputy Emily Patterson
- Lieutenant Governor Eleni Kounalakis
- State Treasurer Fiona Ma
- State Controller Betty Yee
- Attorney General Rob Bonta
- Secretary of State Shirley Weber
- Secretary Lourdes Castro, Business, Consumer Services, and Housing Agency
- Director Gustavo Velasquez, Department of Housing and Community Development
- Chief Deputy Director Zack Olmstead, Department of Housing and Community Development
- Deputy Director of Legislation Pedro Galvao, Department of Housing and Community Development
- Director Keely Bosler, Department of Finance

- **State Legislative Leadership:**

- Senate President Pro Tempore Toni Atkins
- Senate Minority Leader Scott Wilk
- Assembly Speaker Anthony Rendon
 - Katie Kolistos, Special Assistant to the Speaker
- Assembly Minority Leader Marie Waldron

- **Key Legislative Committees:**

- Senate Committee on Housing
 - Chair, Scott Wiener

TPA has worked closely with Senator Wiener and his staff over the past few years on various projects to maintain local control.
 - Chief Consultant, Joe Stephenshaw
- Senate Committee on Governmental Organization
 - Chair, Mike McGuire

TPA has worked closely with Senator McGuire and his staff on issues related to housing, economic development, local control, and wildfire prevention and intervention.



- Senate Committee on Appropriations
 - Chair, Anthony Portantino
- Senate Committee on Budget
 - Chair, Nancy Skinner

TPA has worked closely with Senator Skinner over many years and have built a very strong working partnership with the Senator, her office, as well as the staff of the Senate Budget Committee. We have worked on numerous issues that impact our clients and to help secure direct allocations. TPA has worked closely with the Chair and her staff on issues related to affordable housing, homelessness, transportation, natural resources, and other topics. TPA is in regular communication with the Senator, her Chief of Staff, and committee staff and we discuss many topics such as the needs of our clients, partnering together on legislation, and other items.

- Assembly Committee on Housing and Community Development
 - Chair, David Chiu

TPA has worked closely with Assembly Member Chiu and his staff on legislation related to affordable housing and transportation.

- Chief Consultant, Christian Griffith
- Assembly Committee on Local Government

- Chair, Cecilia Aguiar-Curry

TPA has worked closely with Assembly Member Aguiar-Curry, as well as the staff of the Assembly Local Government Committee, on numerous issues that impact our clients. TPA has worked closely with the Chair of the Local Government Committee on issues related to affordable housing, homelessness, redevelopment dissolution, public employee retirement, redistricting, and Local Agency Formation Commissions. TPA regularly meets with the Assembly Member, and committee staff, to provide them information on how pending legislation may impact local governments, as well as updates on how local governments are implementing legislation that has previously been signed into law.

- Assembly Committee on Appropriations
 - Chair, Lorena Gonzalez



- Assembly Committee on Budget
 - Chair, Phil Ting

TPA has worked closely with Assembly Member Phil Ting , as well as the staff of the Assembly Budget Committee, for many years. We have worked on numerous issues that impact our clients and to help secure direct allocations. TPA has worked closely with the Chair and his staff on issues related to affordable housing, homelessness, economic development, natural resources, and other topics. TPA is in regular communication with the Assembly Member, and committee staff, to provide them information on how local governments are allocating state funding, as well as updates on how local governments are addressing various issues of interest to the State.

PROVIDE EXAMPLES OF THE SCOPE OF SERVICES FOR YOUR CURRENT CLIENTS AND NARRATIVE EXAMPLES OF ACCOMPLISHMENTS IN ACHIEVING THE REQUIREMENTS IDENTIFIED IN THE RESPECTIVE SCOPES OF SERVICES.

TPA utilizes a strategic and comprehensive approach to initiate, develop, and carry out effective strategies to influence legislative and administrative activities and effectively lobby on behalf of our clients. This approach includes, but is not limited to:

- Conducting a detailed orientation
- Developing a legislative strategy
- Implementing the legislative strategy utilizing the following tactics:
 - Building and strengthening relevant relationships
 - Leveraging relationships for the strategic advocacy plan
 - Scheduling meetings to discuss relevant legislation
 - Preparing client briefing materials and talking points
 - Brief legislative offices and stakeholders on client legislative agenda
 - Scheduling follow-up meetings to ensure commitments and deliverables
 - Coordinating meetings and advocacy trips
 - Identify, analyze, and monitor all bill introductions and amendments
 - Crafting testimony and position letters
 - Drafting bill language and other necessary materials
- Providing monthly progress reports
- Being available for client conference calls, in-person briefings, and meetings

Narrative examples that demonstrate accomplishments as a result of this approach to legislative advocacy are included throughout “Proposal Requirements” section of this proposal.

DESCRIBE THE FIRM’S PROPOSED APPROACH TO REPRESENTING THE TRUST IN SACRAMENTO.

TPA will utilize the following strategic and comprehensive approach to provide legislative advocacy services to the Trust:



Conduct Detailed Orientation

TPA utilizes a comprehensive onboarding process that includes extensive meetings with various relevant members of Trust leadership to help develop a strategic plan that is carefully tailored to satisfy the needs of the Trust, as well as designed for maximum success in the current political climate and funding environment.

Administrative, Statutory, or Regulatory Efforts

TPA will monitor the statutory and regulatory process and engage in the following issue areas:

- Joint Powers Authorities authorizing statutes.
- Modifications to Regional Housing Needs Assessment methodology and allotment.
- Modifications to state-wide affordable housing financing programs.
- Modifications to Local Housing Trust Fund Program implementing procedures or program extension.
- Budget surplus allocation for affordable housing, regional housing finance trusts, and the OCHFT.

Orange County Housing Finance Trust State Legislative Platform

Utilizing the information gathered during the onboarding process, TPA will coordinate with the Trust to develop an official legislative platform and strategy that represents the Trust’s priorities in Sacramento. This blueprint will be shared with key stakeholders in the State Legislature and Governor’s Administration.

TPA will utilize the following tactics to develop the Trust’s legislative platform, ensure that the platform is up-to-date, and provide the Trust with updates regarding relevant legislation and advocacy strategies:

- TPA will work with Trust staff to draft the Trust’s state legislative platform which will focus on the next two-year legislative cycle. TPA will work with Trust staff to gain Board approval of the legislative platform.
- If necessary, TPA will work with Trust staff to update the legislative platform for the second year of the two-year legislative cycle.
- TPA will create an annual legislative watch list and update the list monthly to track legislation that may impact the mission and goals of the Trust.
- TPA will make recommendations to the Trust Board and staff regarding legislation that may impact the Trust’s authorizing statute, mission, finances, and operations.
- TPA will provide bi-monthly oral reports to the Trust Board of Directors.



- TPA will submit written legislative updated to include activities and status reports for inclusion in the Board of Directors bi-monthly meeting agenda packet.

Liaison and Advocacy Activities

TPA will advocate for the Trust’s legislative agenda utilizing the following methods:

- TPA will recommend appropriate meetings for Trust Board members and staff with key legislators and provide logistical support for all Sacramento visits. This will include access to the TPA State Capitol Office, located across the street from the State Capitol, as a venue for meetings or a temporary workspace for Trust leadership and staff while in Sacramento.
- TPA will notify Trust staff of anticipated, newly introduced or amended state legislation, regulations, and administrative policies that could impact the Trust and provide a legislative analysis on how such actions may effect the interest of the Trust and a strategy to address those impacts.
- TPA will work closely with Trust staff to develop positions and strategies that support the Trust’s legislative objectives.
- TPA will attend hearings and other public sessions of interest on behalf of the Trust.
- TPA will testify at legislative hearings on behalf of the Trust. Additionally, TPA will prepare testimony for Trust Board members and staff.
- TPA will draft language and amendments for relevant legislation, as required to protect and promote the Trust’s agenda.
- TPA will assist Trust staff with the preparation of written materials supporting the Trust’s legislative goals. These materials may include, but are not limited to letters, talking points, legislative language, legislative summaries, and position papers.
- TPA will provide ongoing advocacy advice to the Trust to support the Trust’s legislative goals and strategy.
- In an effort to maximize state funding, TPA will work with the Trust to identify projects and other funding priorities that may be suitable for funding through the State Budget. TPA will coordinate with the Trust to develop supporting materials for the budget request. TPA will also work with members of the Trust’s state legislative delegation, along with the Assembly and Senate Budget Committees, to gain support for the inclusion of the Trust’s project(s) in the final State Budget approved by the Legislature.



- TPA will be proactive in building alliances and coalitions with like-minded entities to advance the Trust's legislative interests.
- TPA will maintain frequent contact with the Orange County legislative delegation and their staff to represent and advocate for the Trust's policies and positions.
- TPA will maintain direct and frequent contact with key members and staff of appropriate Senate and Assembly Committees to represent, educate, and advocate Trust policies and positions.
- TPA will meet with and arrange meetings as appropriate for Trust Board members and staff with Executive Branch officials and departments including the California Department of Housing and Community Development, California Housing Finance Agency, and other relevant agencies.

Additional Responsibilities

In addition to the services above, TPA will undertake additional assignments as needed and mutually agreed to by both parties, including preparing and filing applicable state lobbying disclosure reports on behalf of the Trust.

As-Needed Services

When necessary, TPA will assist the Trust with as-needed services.

PROVIDE SAMPLES OF PAST REPORTS, INFORMATIONAL MATERIAL, AND WRITTEN CORRESPONDENCE WHICH SHOW SPECIFIC ACCOMPLISHMENTS SIMILAR TO WHAT YOU WOULD EXPECT TO ACCOMPLISH FOR THE TRUST.

Samples of previous work can be found in Attachment I: Sample Work.




COMPENSATION PROPOSAL

Attachment 4 Compensation Proposal

Enter below the proposed price for full compensation to proposer for full and complete performance of the Services identified in the RFP Scope of Services. Prices shall include direct costs, indirect costs, profit, and any other costs associated with providing the services as described in this RFP.

Monthly Fee, including expenses: \$ 6,000.00

Proposer Name: Townsend Public Affairs
Address: 925 L Street, Suite 1404
Sacramento, CA 95814
Phone Number: 916-447-4086

Signature: 
Printed Name: Christopher Townsend
Title: President
Date: 10/8/2021



DISCLOSURE OF CONTRIBUTIONS

Attachment 5

Disclosures of Contributions

To be completed with the submission of any proposal.

Prime Firm's Name: Townsend Public Affairs

Party's Name: Townsend Public Affairs

Party's Address: 925 L Street, Suite 1404

Street

Sacramento CA

City State

95814 (916) 447-4086

Zip Code Phone Number

Board Member(s) to whom you and/or your agent made campaign contributions and dates of contribution(s) in the 12 months preceding August 25, 2021 (see attached lists):

Name of Member: Steve Faessel

Name of Contributor (if other than Party): Townsend Public Affairs

Date(s): October 2, 2020

Amounts(s): \$600,000

Name of Member: _____


Name of Contributor (if other than Party): _____

Date(s): _____

Amounts(s): _____

If no contributions are noted above, I hereby certify that no contributions have been made by the Party identified above to any of the Trust's Board of Directors.

Date: 10/8/2021


Signature of Party and/or Agent



CONFIDENTIAL AND PROPRIETARY INFORMATION

This proposal is not marked confidential or proprietary.



ATTACHMENT I: SAMPLE WORK

The following pages include sample work product produced by the key personnel included in this proposal.



City of Laguna Beach
2020 State and Federal Legislative Platform

Adopted by the City Council on January 21, 2020

The Mayor is authorized to submit advocacy letters on behalf of the City if the proposed state or federal legislation clearly follows the City's adopted legislative platform. The City Manager is authorized to do the same if the Mayor concurs.

GUIDING PRINCIPLES

I. PRESERVE LOCAL CONTROL

Preserve and protect the City's powers, duties, and prerogatives to enact local legislation and policy direction concerning local affairs and oppose legislation that preempts local authority. Local agencies should preserve and enhance authority and accountability for revenues raised and services provided.

II. PROMOTE FISCAL STABILITY

Support measures that promote fiscal stability, predictability, financial independence, and preserve the City's revenue base and maximum local control over local government budgeting. Oppose measures that shift local funds to the county, state, or federal governments and/or make cities more dependent on the county, state, or federal governments for financial stability, such as mandated costs with no guarantee of local reimbursement or offsetting benefits.

III. SUPPORT FUNDING OPPORTUNITIES

Support opportunities that allow the City to compete for its fair share of regional, state, and federal funding, and that maintain current funding streams. Funding opportunities may include competitive grant and funding programs as well as dedicated funding streams at the regional, state, and federal levels that allow the City to maximize local revenues, offset and leverage capital expenditures, and maintain City goals and standards. Funding priorities include, but are not limited to: parks and recreation, transportation, transit, utility undergrounding, public works, community services, community development, sustainable communities, smart growth, water infrastructure, water conservation, water reliability, public safety, fuel modification, clean air, renewable energy, and affordable housing.

POLICY STATEMENTS

LOCAL GOVERNMENT FINANCE

1. Oppose state or federal efforts to "borrow" local revenues and encourage the state to find other methods of balancing its budget.
2. Oppose legislation that would eliminate or reduce the City's franchise fee revenues.
3. The City supports the use of incentives to encourage local government action, rather than the imposition of state, federal, or regional mandates upon local governments, as well as federal mandates on the state.

4. Support measures that preserve maximum local control over any legislation that would increase taxes in order to support statewide infrastructure.
5. Support efforts to grant greater flexibility to local governments in creating new revenue sources for infrastructure projects.
6. Support efforts to reimburse the City for providing services to nonresidents associated with beach access such as police, fire, or other emergency services, beach waste disposal, and maintenance of restroom facilities.

ADMINISTRATIVE SERVICES

Employee Relations

1. Oppose measures that reduce local control over employee relations issues.
2. Oppose legislation mandating new or enhanced local government employee benefits.
3. Oppose proposals that would create an additional financial burden on, or threaten the viability of, the California Public Employees' Retirement System (CalPERS).

COMMUNITY DEVELOPMENT

Housing & Land Use

1. Oppose legislation, proposals, or regulations that imposes regional, state, or federal growth, development, or land use planning standards within the City.
2. Oppose legislation, proposals, or regulations that penalizes local governments for noncompliance with their housing element or regional housing needs assessment requirements.
3. Support efforts to strengthen the legal and fiscal capability of local agencies to prepare, adopt and implement plans for orderly growth, development, and conservation of local planning areas.
4. Support state and federal legislation, proposals, or regulations which would provide resources for the City to meet its housing needs and requirements.
5. Support increased state and federal funding for the City's Alternative Sleeping Location and other similar regional facilities to address homelessness.
6. Support initiatives involving county, state, and federal governments to reduce and prevent homelessness.
7. Support legislation that retains local control and authority in placing restrictions or regulations on residential units for tourist or transient use.
8. Support legislation that preserves local control over the establishment and operation of group homes and sober living homes.

9. Oppose efforts that remove local regulatory authority on wireless infrastructure development and support legislation that promotes more local control.

Regional Governance

1. Support proposals encouraging regional, sub-regional, or countywide cooperation in planning urban development strategies, especially those that provide funding for effective implementation of agreed-upon goals.
2. Support measures to achieve fair and proportionate representation on countywide and regional boards.

Sustainable Development

1. Support legislation that addresses sustainable development practices, including “green building” and “smart streets”, and that provides financial and technical support to the local government in implementing such practices.
2. Support measures that maintain and enhance local decision-making authority in the development and implementation of environmental strategies.

COMMUNITY SERVICES

Air Quality and Climate Change

1. Support legislation and policies that assist local government in meeting or exceeding goals to reduce global warming pollution levels. These efforts include reducing dependence on fossil fuels, developing alternative energy resources, reducing greenhouse gas emissions, and developing fuel-efficient technologies.
2. Support measures that provide for continued funding and incentives to cities to work together to improve air quality while balancing the reduction of emissions with impacts on business.
3. Support legislation that would require manufacturers to assume financial and/or physical responsibility for the costs of collecting, processing, recycling or disposing of products at end-of-life.
4. Support legislation and grants that would provide funds to support projects that demonstrate cost-effective, environmentally friendly, cutting edge technologies, and renewable energy for publicly-owned facilities.

Parks, Recreation and Open Space

1. Support legislation that promotes access to joint use of schools; parks and open space; and the development of streets and trails that encourage physical activity and healthy living.

2. Promote policies that recognize the benefits of parks and recreational facilities in the advancement of "sustainable communities" and curbing greenhouse gas emissions.
3. Work to strengthen policies that fund parks, open-space acquisition, bike lanes, and non-motorized trails.
4. Support and work with county, state, and federal officials in the establishment of regional, state, and federal parks as well as open space while preserving local control and land management for future infrastructure projects.

Solid Waste

1. Support measures that maintain and enhance local authority and economic flexibility to regulate solid waste and recyclables.

Coastal Protection

1. Support state and federal administrative and legislative efforts aimed at the safe removal, transport, and interim and/or long-term storage of nuclear waste from the San Onofre Nuclear Generating Station.
2. Support state and federal legislation and programs to protect the City's shoreline, including those which provide financial and technical assistance to coastal communities to address sea level rise, develop resilient infrastructure, protect beach water quality, and prevent stormwater runoff.
3. Support legislation and policies that oppose new offshore oil and gas drilling, fracking and other well stimulation in federal and state waters off the California Coast.

Water Supply

1. Support legislation that encourages strong water efficiency standards and increased water conservation strategies.
2. Support legislation that would increase the availability of, and funding for, water reuse technologies, water recycling, local water storage, and other water supply technologies.
3. Support measures to increase water supply and improve water quality in the region, including drought relief legislation.
4. Support legislation that would require the inspection, and possible repair, of sewer laterals at the time of sale in residential, commercial, and industrial areas.

Airplane Noise

1. Support legislation and regulations that promotes the reduction of aircraft noise impacting the City.

2. Support legislative and regulatory efforts to monitor, regulate and enforce helicopter noise in residential areas while being respectful of law enforcement and emergency first responder operations.

PUBLIC SAFETY

1. Support measures that encourage community safety and well-being.
2. Support legislation and implementation of state programs and policies that promote pedestrian and bicycling safety.
3. Support legislation to provide a greater share of asset forfeiture funds and increased latitude for spending local funds.
4. Support legislative efforts to increase the amount of grant funding for local law enforcement, fire suppression, mitigation and prevention, marine safety, and disaster preparedness initiatives.
5. Support legislation and regulations that requires public utilities to provide for fire safety measures in high fire-risk areas.
6. Support legislation that discourages drivers from operating motor vehicles while under the influence of drugs or alcohol and maintain state funding to operate sobriety checkpoints.

PUBLIC WORKS

1. Support legislation that would increase funding for local transportation projects including road resurfacing projects; the City's transit system; adding bicycle lanes, sidewalks, and trails throughout the city; and enhancing pedestrian safety.
2. Support increased state and federal funding of transportation improvements with regional or sub-regional benefits for all modes of transportation.
3. Support legislation that affords local agencies greater discretionary authority to expend available transportation funds and affords local jurisdictions greater flexibility over transportation-related issues.
4. Support legislation that would require public utilities to underground power lines in high fire risk areas and support legislation that would provide funding for undergrounding of utilities.
5. Support legislation that includes state, federal, and regional funding formulas that ensure equitable distribution of funds at the local level.

MEMORANDUM

2021-22 State and Federal Housing and Homeless Update

OVERVIEW

This memorandum is an overview of the various funding programs for housing and homeless-related efforts and projects included in the 2021-22 State Budget and federal legislation. The information in this memorandum is from official proposals, analyses, guidelines and other materials, and is organized as follows:

- **2021–22 State Budget Summary**
- **Housing and Homeless Programs**
 - *Homeless Housing, Assistance and Prevention Program*
 - *Encampment Resolution Grants*
 - *Family Homelessness Challenge Grants*
 - *Regional Early Action Planning Grant Program*
 - *Project Homekey*
 - *Infill Infrastructure Grant Program of 2019*
 - *Affordable Housing Backlog and Preservation*
 - *Foreclosure Intervention and Housing Preservation Program*
 - *Excess Sites*
- **Federal Housing and Homeless Programs**
 - *American Rescue Plan Act*
 - *Emergency Housing Vouchers*
 - *HOME Investments Partnership Program*
 - *Emergency Rental Assistance Program*
 - *Homeowner Assistance Fund*
- **2021-22 State Homeless-Related Legislation**



State Capitol Office • 925 L Street • Suite 1404 • Sacramento, CA 95814 • Phone (916) 447-4086 • Fax (916) 444-0383
Federal Office • 600 Pennsylvania SE • Suite 207 • Washington, DC 20003 • Phone (202) 546-8696 • Fax (202) 546-4555
Central California Office • 744 P Street • Suite 308 • Fresno, CA 93721 • Phone (949) 399-9050 • Fax (949) 476-8215
Southern California Office • 1401 Dove Street • Suite 330 • Newport Beach, CA 92660 • Phone (949) 399-9050 • Fax (949) 476-8215
Northern California Office • 300 Frank Ogawa Plaza • Suite 204 • Oakland, CA 94612 • Phone (510) 835-9050 • Fax (510) 835-9030

2021-22 STATE BUDGET SUMMARY

In response to the Governor's revised budget proposal released in May, the Legislature finalized its own budget development process in June and approved a budget bill (Assembly Bill 128) prior to the Constitutional deadline of June 15. Budget negotiations between the Governor and State Legislature continued throughout June, with a final budget bill (Senate Bill 129) approved on June 28 (and signed into law on July 12).

Final budget negotiations required the introduction of smaller budget bills to make changes to funding amounts included in Assembly Bill 128. In addition, there will be a total of more than 20 trailer bills approved with the final agreement that will include provisions for various programs and the use of funds. For example, a budget line item for a specified dollar amount to the Department of Housing and Community Development for homelessness assistance to local agencies would require a trailer bill to specify what entities are eligible for funding, criteria for use of those funds, and processes and accountability related to the distribution of funding.

On July 15, the Legislature approved Assembly Bill 140 (signed into law on July 19) which contained the majority of provisions for housing and homelessness programs as part of the overall State Budget. This document summarizes those provisions and will be updated as necessary following any final subsequent efforts on the State Budget.

HOUSING AND HOMELESS PROGRAMS

Homeless Housing, Assistance, and Prevention Program

In 2019, the State Budget created the Homeless Housing, Assistance, and Prevention Program (HHAPP) for the purpose of providing jurisdictions with grant funds to support regional coordination and expand or develop local capacity to address their immediate homelessness challenges informed by a best-practices framework focused on moving homeless individuals and families into permanent housing and supporting the efforts of individuals and families to maintain their permanent housing. In addition, funding was intended to support local jurisdictions in their unified regional response to reduce and end homelessness.

The HHAPP was funded through two rounds—\$650 million announced in 2019 and \$300 million announced in 2020. The funding was made available through the Business, Consumer Services, and Housing Agency (BCSH) and Homeless Coordinating Financing Council (HCFC) for implementing the program. Eligible applicants included California's 13 largest cities, 58 counties, and 44 Continuums of Care (CoCs).

Generally, recipients of funding were able to expend funds on evidence-based solutions that address and prevent homelessness among eligible populations including any of the following:

- Rental assistance and rapid rehousing.
- Operating subsidies in new and existing affordable or supportive housing units, emergency shelters, and navigation centers. Operating subsidies may include operating reserves.
- Incentives to landlords, including, but not limited to, security deposits and holding fees.



- Outreach and coordination, which may include access to job programs, to assist vulnerable populations in accessing permanent housing and to promote housing stability in supportive housing.
- Systems support for activities necessary to create regional partnerships and maintain a homeless services and housing delivery system, particularly for vulnerable populations including families and homeless youth.
- Prevention and shelter diversion to permanent housing.
- New navigation centers and emergency shelters based on demonstrated need.

The 2021-22 State Budget provides for the allocation of \$2 billion in funds over the next two years for flexible aid for local governments to combat homelessness through the HHAPP. Specifically, the State Budget:

- Allocates **\$1 billion** for Round 3 HHAPP funding in the 2021-22 fiscal year.
 - Provides that **80 percent or \$800 million** to applicants that are cities, counties or CoCs as follows:
 - **32 percent or \$240 million** to CoCs based on each CoC’s proportionate share of the State’s total homelessness population, based on homeless point-in-time count. Requires the HCFC to award no more than 40 percent of this allocation to any one CoC.
 - **42 percent or \$336 million** to cities, or cities that are also a county, that have a population of 300,000 or more, as of January 1, 2020. Requires the HCFC to calculate the allocation to a city based on the city’s proportionate share of the total homeless population of the region served by the CoC within which the city is located, based on homeless point-in-time count. Requires the HCFC not to award more than 45 percent of this allocation to any one city. Provides that if more than one recipient within the CoC meets the requirement of this subparagraph, the proportionate share of funds shall be equally allocated to those jurisdictions.
 - **28 percent or \$224 million** of the allocation to counties. Requires the HCFC to calculate the allocation to a county based on the county’s proportionate share of the total homeless population of the region served by the CoC within which the county is located based on the homeless point-in-time count. Requires the HCFC not to award more than 40 percent of the program allocation to any one county.

Annual HHAPP Distribution Funding Categories		
Category for Distribution	Funded Amount	Eligible Applicants
Continuum of Care— <i>Based on Point in Time Count Ranges</i>	\$240 million	Continuum of Care (CoC)
City/City that is also a County — <i>Based on Percent of Homeless Population</i>	\$336 million	Large cities with a population over 330,000
County— <i>Based on Percent of Homeless Population</i>	\$224 million	Counties



- **18 percent or \$180 million** of the funding available be set aside for awarding bonus funding for jurisdictions that achieve the outcome goals specified in their applications, described below. Requires the HCFC to determine bonus award allocations, based on homeless population, and to report to the chairs of the relevant fiscal and policy committees within 30 days of making the funding allocation determinations.
- Provides not more than **2 percent or \$20 million** of the funding to tribal applicants, as follows:
 - Allows tribes to request funds, and to be allocated funds up to their requested amount, or up to a total of \$20 million collectively among all tribal applicants.
 - Allows the HCFC to make allocations to tribes on the basis of a tribal applicant's proportionate share of need relative to all tribes that submit an application for funding.
 - Provides that a tribal applicant may partner with a local CoC or coordinated entry system.
 - Provides that any funds available to tribal applicants that are unallocated by July 1, 2025, shall be allocated as bonus awards.
- Provides for the allocation of Round 3 funds to eligible jurisdictions via the following process:
 - Requires the HCFC to issue a standard agreement for applicants to apply for Round 3 program funds no later than **September 15, 2021**, which specifies requirements for applicants to submit an application that includes a local homelessness action plan and specific outcome goals.
 - Requires a signed standard agreement to be returned to the HCFC no later than 30 days from the date the HCFC issues the agreement.
 - Requires the HCFC to allocate 20 percent of an eligible city's, county's, or CoC's total allocation upon receipt of a signed standard agreement.
 - Allows a city, city and county, single CoC, or county to apply jointly with a counterpart entity or entities. Provides that an applicant that applies jointly shall be allocated 25 percent of the jointly applying jurisdictions' total allocation instead of 20 percent upon receipt of a signed standard agreement.
 - Requires a joint application to include, at a minimum, evidence of collaboration between the jointly applying applicants and an explanation of how the jointly applying applicants will administer the funds allocated to them.
 - A recipient is permitted to use the initial funds awarded to complete the local homeless action plan, including paying for any technical assistance or contracted entities to support completion of the homeless action plan.
 - Requires an applicant to submit an application to the HCFC by **June 30, 2022**, that includes a local homelessness action plan, a narrative, and specific outcome goals to receive the remaining balance of its Round 3 program allocation, as follows:
 - Requires that a complete application include the following:
 - A local homelessness action plan.



- Outcome goals aimed at preventing and reducing homelessness over a three-year period, informed by the findings from the local landscape analysis and the jurisdiction’s base system performance measure from 2020 calendar year data in the Homeless Data Integration System. The outcome goals shall set definite metrics, based on the United States Department of Housing and Urban Development’s system performance measures.
 - A narrative describing the uses of the requested funds and how they will help the jurisdiction achieve their outcome goals.
 - Requires an applicant to engage with the HCFC on its local plan and outcome goals before submitting a complete application.
 - Requires an applicant to agendize the application at a regular meeting of its governing body, including receiving public comment, before being submitted to the HCFC.
 - Requires the HCFC to either approve the application, and issue the notice of award to allocate the remaining percent of an applicant’s funding, or return it to the applicant with written comments and specific requested amendments.
- Requires Round 3 funds to be used in the following manner:
 - Prohibits a program recipient from using funding from the program to supplant existing local funds for homelessness services under penalty of disallowance or reduction, or both, of future program funds, as determined by the HCFC.
 - Provides that no more than 5 percent or \$50 million of the funds available shall be used to cover the HCFC’s costs of administration. The HCFC may expend administrative funds until December 31, 2026, to complete grant close-out activities.
 - Provides that a program recipient use at least 10 percent of the funds allocated for homeless youth populations.
 - Requires all funds to be expended on evidence-based homeless interventions and in compliance with Housing First.
 - Provides that all Round 3 program funds, including bonus funds, shall be expended by **June 30, 2026**.
 - Requires that no later than **June 30, 2024**, recipients shall demonstrate whether they have successfully met their outcome goals.
 - Jurisdictions that meet their outcome goals shall be eligible for bonus funds. The HCFC shall allocate bonus awards in a reasonable and equitable manner, based on homeless population, to all jurisdictions who have qualified for bonus funds no later than **November 1, 2024**.
 - Jurisdictions that have not met their outcome goals shall not be eligible for bonus funding and shall accept technical assistance from HCFC staff and may also be required to limit the allowable uses of these program funds, as determined by the HCFC.



- Allocates **\$1 billion** for Round 4 HHAPP funding in the 2022-23 fiscal year, in amounts and to eligible applicants identical to Round 3 HHAPP.
- Provides for the allocation of Round 4 funding via the following process:
 - Requires the HCFC to make an application for Round 4 program allocations available no later than **September 30, 2022**. Applications shall be due to the HCFC no later than 60 days from the date the HCFC makes those applications available.
 - Requires an applicant to submit an application with the following information to receive a Round 4 allocation:
 - A local homelessness action plan that provides an update on the local homelessness action plan included in an application for a Round 3 program allocation.
 - New outcome goals that build upon prior years outcome goals.
 - Requires that each applicant determine its outcome goals that build upon prior year goals in consultation with the HCFC, and requires consultation with the HCFC before submitting final outcome goals.
 - A narrative describing how the requested funding will be used and how it will support the specified outcome goals.
 - Requires a city, county, and CoC application to be agendized at a regular meeting by the applicant's governing body, including receiving public comment, before submitting to the HCFC.
 - Requires the HCFC to approve the application and issue the notice to award to disburse 50 percent of an applicant's funding within 30 days, or return it to the applicant with written, detailed comments and request one or more amendments.
- Requires funding allocated in Round 4 of the program to be spent in the following manner:
 - Prohibits a program recipient from using funding from the program to supplant existing local funds for homelessness services under penalty of disallowance or reduction, or both, of future program funds, as determined by the HCFC.
 - Provides that no more than five percent or \$50 million of the funds shall be used to cover the HCFC's costs of administration of this section. The HCFC may expend administrative funds until December 31, 2027, to complete grant close-out activities.
 - Provides that a program recipient use at least 10 percent of the funds allocated for homeless youth populations.
 - Requires all funds to be expended on evidence-based interventions and in compliance with Housing First.
 - Requires a recipient to contractually obligate not less than 75 percent and expend not less than 50 percent of the initial Round 4 program allocations no later than



May 31, 2025. If the jurisdiction has met this requirement, and can demonstrate that they are on track to meet their outcome goals, the HCFC shall distribute the balance of the jurisdiction's allocated funding.

- If a jurisdiction cannot meet this requirement, they must submit an alternative disbursement plan that includes an explanation for the delay on or before **June 30, 2025**. Requires the HCFC to approve the alternative disbursement plan prior to distributing additional funding.
- Provides that the HCFC shall determine whether a recipient has met its outcome goals through **July 1, 2025**, and shall award bonus funding as soon as data becomes available, but no later than **November 1, 2025**.
 - Allows the HCFC to provide exceptions to meeting outcome goals if the recipient demonstrates hardship by a disaster for which a state of emergency is proclaimed by the Governor.
- Requires that all Round 4 program funds, including bonus funds, shall be expended by **June 30, 2027**.
- Requires applicants to report specific information for all rounds of program allocations through a data collection, reporting, performance monitoring and accountability framework established by the HCFC. This includes:
 - Data on the applicant's progress towards meeting their outcome goals submitted annually on December 31 of each year through the duration of the program.
 - If an applicant has not made significant progress toward meeting outcome goals, they must submit a description of barriers and possible solutions and accept technical assistance from the HCFC.
 - Requires applicants to provide quarterly fiscal reports to the HCFC. If applicants are not on-track to meet their performance goals, these quarterly reports shall include an update on meeting those goals.
 - Applicants must provide a final report on Round 3 funding by **October 1, 2026**, and on Round 4 funding by **October 1, 2027**.

Encampment Resolution Grants

The State Budget appropriates **\$50 million** and establishes the Encampment Resolution Funding Program to assist cities, counties, and CoCs in ensuring the safety and wellness of people experiencing homelessness in encampments to do the following:

- Provide competitive encampment resolution grants to resolve encampment concerns.
- Transition individuals into safe and stable housing.
- Encourage a data-informed, coordinated approach to address encampment concerns.
- Requires the HCFC to award initial grants by **March 1, 2022**.



Family Homelessness Challenge Grants

The State Budget establishes the Family Homelessness Challenge Grants and Technical Assistance and appropriates **\$40 million** to fund one-time grants and technical assistance to local jurisdictions in order to address and end family homelessness.

- 75 percent or **\$30 million** in funding appropriated for this purpose available for competitive grants, to be allocated in two competitive solicitations.
- 20 percent or **\$8 million** in funding available for technical assistance for local jurisdictions.
- 5 percent or **\$2 million** in funding available for administration of the program.
- Requires that funding be made available no later than **March 1, 2022**, and that funds be expended by **June 30, 2026**.

Regional Early Action Planning Grant Program

The State Budget establishes the Regional Early Action Planning (REAP) Grants Program of 2021 (funding amount to be determined). Specifically, the State Budget:

- Requires that the program be developed and administered by the Department of Housing and Community Development (HCD) in collaboration with the Office of Planning and Research (OPR), the Strategic Growth Council (SGC) and the State Air Resources Board (ARB) to provide regions with funding for transformative planning and implementation activities.
- Allocates funding as follows:
 - 85 percent to Metropolitan Planning Organizations based on projected population.
 - 5 percent to rural jurisdictions.
 - 5 percent for “exemplary” projects that exceed the requirements of the program.
 - 5 percent for program administration.
- Requires that funds be spent on planning and implementation projects that improve housing and reduce per capita vehicle miles travel in furtherance of applicants’ Sustainable Community Strategies.



Project Homekey

Building on the success of Project Roomkey, Project Homekey is the second phase in the State's response to protecting Californians experiencing homelessness who are at high risk for serious illness and are impacted by COVID-19.

Administered by HCD, grant funding is made available to local public entities, including cities, counties, or other local public entities, including housing authorities, or federally recognized tribal governments within California to purchase and rehabilitate housing, including hotels, motels, vacant apartment buildings, and other buildings and convert them into interim or permanent, long-term housing.

Under the Homekey program, local entities partner with the State to acquire and rehabilitate a variety of housing types, including (but not limited to) hotels, motels, vacant apartment buildings, and residential care facilities in order to serve people experiencing homelessness or who are also at risk of serious illness from COVID-19.

Eligible applicants include local entities including housing authorities and federally recognized tribal governments within California. Cities, counties, or other local public entities, including housing authorities or federally recognized tribal governments within California, may apply independently as a Development Sponsor or jointly with a non-profit or a for-profit corporation.

Awarded funds must be used to provide housing for individuals and families experiencing homelessness or at risk of experiencing homelessness and who are impacted by the COVID-19 pandemic.

The 2021-22 State Budget continues to provide for the use of additional State and federal funds for the acquisition, rehabilitation, and conversion of hotels, motels, commercial properties, and other non-housing properties for non-congregate housing for homeless individuals. Funding in the State Budget is appropriated over the next two years:

- 2021-22—**\$1.45 billion** (\$1.2 billion federal American Rescue Plan Act, or ARPA, funds and \$250 million General Fund)
- 2022-23—**\$1.3 billion** (\$1 billion ARPA funds and \$300 million General Fund)

In addition to the 2-year funding distribution, the State Budget makes other statutory changes, including:

- Providing that the deferred payment loan requirement under the program would not apply to assistance provided pursuant to these provisions.
- Authorizing HCD to adopt guidelines for the expenditure of funds appropriated to HCD under these provisions and requires HCD to report to the Legislature on the use of the funds in its annual report, including, among other things, an explanation of how funding decisions were made and the number of individuals housed, or likely to be housed, using the funds.



- Exempting from CEQA, until July 1, 2024, a project described above and funded pursuant to these provisions if certain requirements are met, including that the project proponent submits to the lead agency a letter of support from a county, city, or other local public entity for any proposed rehabilitation, construction, or major alteration work. If the lead agency determines that a project is not subject to CEQA and the lead agency determines it will approve or carry out the project, the bill would require the lead agency to file a notice of exemption.

The State Budget also requires the Director of the Department of Industrial Relations to establish and maintain a strategic enforcement unit focused on construction, alteration, and repair projects. Requires the unit to enhance the department's enforcement of the Labor Code in construction, alteration, and repair projects related to Project Homekey.

Infill Infrastructure Grant Program of 2019

The purpose of the Infill Infrastructure Grant (IIG) Program is to promote infill housing development by providing financial assistance for Capital Improvement Projects that are an integral part of, or necessary to facilitate the development of, a Qualifying Infill Project or a Qualifying Infill Area.

The IIG is grant assistance, available as gap funding for infrastructure improvements necessary for specific residential or mixed-use infill development projects or areas. Funds will be allocated through a competitive process, based on the merits of the individual Infill Projects and Areas. Application selection criteria includes project readiness, affordability, density, access to transit, proximity to amenities, and consistency with regional plans.

To be eligible for funding, a Capital Improvement Project must be an integral part of, or necessary for the development of either a Qualifying Infill Project or housing designated within a Qualifying Infill Area. Eligible costs include the construction, rehabilitation, demolition, relocation, preservation, and acquisition of infrastructure.

Eligible Applicants means one of, or any combination of, the following:

- A nonprofit or for-profit Developer of a Qualifying Infill Project;
- A city, county, city and county, or public housing authority, or redevelopment agency that has jurisdiction over a Qualifying Infill Area;
- A city, county, city and county, public housing authority, or redevelopment agency that has jurisdiction over a Qualifying Infill Area applying jointly with an "owners' association," as defined in the Street and Highways Code section 36612 for a business or property improvement district that includes the Qualifying Infill Area;
- The duly constituted governing body of an Indian reservation or rancheria that has jurisdiction over a Qualifying Infill Area or a Tribally Designated Housing Entity that is the Developer of a Qualifying Infill Project.



The State Budget makes provisions for the allocation of additional State funds through the IIG Program of 2019. Specifically, the State Budget:

- Extends the operation of the IIG Program from January 1, 2023, to January 1, 2026.
- Authorizes HCD to expend **\$250 million** pursuant to the IIG Program of 2019 as follows:
 - **\$160 million** for selected capital improvements for large jurisdictions under the program.
 - **\$90 million** for over-the-counter grants for capital improvements for projects for small jurisdictions under the program.
- Authorizes up to 5 percent of the funds to be set aside for program administration.

Affordable Housing Backlog and Preservation

The State Budget includes significant funding for developing, constructing, and preserving affordable and livable housing, including:

- *Multifamily Housing Program*—**\$1.75 billion** to alleviate the backlog in affordable housing construction.
- *Housing and Community Development*—**\$300 million** for the preservation of existing affordable housing.
- *Joe Serna Jr., Farmworker Housing Grant Program*—**\$130 million** for the development, maintenance, and preservation of farmworker housing.
- *Strategic Growth Council*—**\$600 million** for planning and implementation grants to help local governments plan for and meet their goals under their Sustainable Community Strategies.

The State Budget provides for the allocation of funds for the preservation of State-funded affordable housing properties that are in danger of losing their affordability protections. Specifically, the State Budget also:

- Authorizes HCD, upon appropriation, to make loans or grants, or both loans and grants, to rehabilitate, capitalize operating subsidy reserves for, and extend the long-term affordability of department-funded housing projects that have affordability restrictions that have expired, that have an affordability restriction with a remaining term of less than five years, or are otherwise at risk for conversion from affordable to market rate.
- Requires HCD to establish loan processing or transaction fees for loans or grants authorized under these provisions and requires that funds received by HCD in repayment of loans under these provisions be deposited in the Housing Rehabilitation Loan Fund, to be used for the Multifamily Housing Program.
- Authorizes HCD to adopt guidelines to implement this program and exempt those guidelines from the rulemaking provisions of the Administrative Procedure Act.



Foreclosure Intervention and Housing Preservation Program

The State Budget appropriates **\$500 million** and establishes the Foreclosure Intervention Housing Preservation Program which specifically:

- Allows HCD to contract with program administrators to offer grants or loans to qualifying nonprofits, community land trusts, or qualifying LLCs to purchase housing properties (one to 25 units) either out of foreclosure or after the property has defaulted on its loans but before it enters foreclosure.
- Requires HCD to consider geographic equity in allocating funds, among other guideline requirements.
- Requires grantees/borrowers to keep the units affordable for 55 years. Allows a temporary exemption if some of the units are market rate when acquired, but requires them to convert to affordable once existing tenants move out.
- Allows HCD to contract with fund administrators through June 30, 2026, or longer if funding is available. Funds not committed to an administrator by December 31, 2025, would be reallocated to the Housing Preservation Program for state or local funded projects.
- Requires HCD to report to the legislature by May 2023 on the status of the program.

Excess Sites

The State Budget establishes the Excess Site Local Government Matching Grant Program administered by HCD to provide selected developers with one-time grants for development activities to enable development on excess State-owned property.

- Requires HCD to allocate grants of up to **\$10 million** to development partners selected under Executive Order No. N-06-19 program to enter a ground lease with the State to create affordable housing on excess State-owned property and that will receive contributions from a local government in support of that affordable housing.
- Requires HCD to award grant funds based on several factors, including value of the local government contribution and the creation of new permanent housing options.
- Authorizes a selected developer and a local government to submit a joint application that includes, among other things, a budget demonstrating the amount of the local government's contribution and a commitment and strategy from the local government to support the selected developer.
- Limits the total amount of funding awarded under the program to \$30 million and requires HCD to set aside up to 5 percent of appropriated funding for program administration.



FEDERAL HOUSING AND HOMELESS PROGRAMS

American Rescue Plan Act

The nation's homelessness crisis has worsened during the pandemic, as people experiencing homelessness are highly vulnerable to COVID-19 transmission, illness, and severity due to their use of congregate shelters and their high prevalence of underlying health conditions. Recently, the Biden Administration announced a coordinated extension and expansion of forbearance and foreclosure relief programs, an important step towards building stronger and more equitable communities.

To bolster these efforts, Congress has passed the American Rescue Plan Act of 2021 (ARPA) to deliver more aid to people struggling to pay their rent or mortgage. The ARPA includes a number of provisions, to be administered by Housing and Urban Development (HUD) and other agencies, to provide immediate and direct relief to help people across America remain stably housed during the pandemic.

Specifically, the ARPA provides several areas of assistance related to homelessness and housing. A number of these are also described in more detail below:

- *Emergency rental assistance*—The legislation provides more than \$21.5 billion in emergency rental assistance, to be administered by Treasury, to help millions of families keep up on their rent and remain in their homes (more information below).
- *Homeowner Assistance Fund*—The legislation provides nearly \$10 billion, to be administered by Treasury, to help homeowners behind on their mortgage and utility payments and avoid foreclosure and eviction (more information below).
- *Emergency housing vouchers*—The legislation provides \$5 billion for emergency housing vouchers for individuals and families who are experiencing homelessness or at risk of homelessness (more information below).
- *Homelessness assistance and supportive services program*—The legislation provides \$5 billion for the HOME Investment Partnerships Program to help create housing and services for people experiencing or at risk of homelessness (more information below).
- *Emergency assistance for rural housing*—The legislation provides \$100 million, to be administered by USDA, to help people in rural communities keep their homes during the pandemic.
- *Relief measures for section 502 and 504 direct loan borrowers*—The legislation provides \$39 million, to be administered by USDA, for USDA Section 502 and 504 home loans, which help low- and very-low income borrowers purchase, repair, and rehabilitate housing in rural areas, while helping existing borrowers who are struggling to afford housing.



Emergency Housing Vouchers

The Emergency Housing Voucher (EHV) program is available through the ARPA. Through EHV, HUD is providing 70,000 housing choice vouchers to local Public Housing Authorities (PHAs) in order to assist individuals and families who are:

- Homeless
- At risk of homelessness
- Fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking
- Were recently homeless or have a high risk of housing instability

HOME Investment Partnerships Program

As noted above, the ARPA provides an additional \$5 billion to provide rental assistance and supportive services to develop affordable rental housing, to help acquire non-congregate shelter to be converted into permanent affordable housing or used as emergency shelter.

This program is being administered through HUD's HOME Investment Partnerships Program. Allocations were announced on April 8. Entitlement cities receiving this HOME funding in the past received direct allocations, while the State was allocated \$155,003,054 for non-entitlement cities.

Emergency Rental Assistance Program

The Emergency Rental Assistance (ERA) program makes funding available to assist households that are unable to pay rent or utilities. Two separate programs have been established: ERA1 provides up to \$25 billion under the Consolidated Appropriations Act, 2021, which was enacted on December 27, 2020, and ERA2 provides up to \$21.55 billion under the ARPA, which was enacted on March 11, 2021. The funds are provided directly to states, U.S. territories, and local governments. Grantees use the funds to provide assistance to eligible households through existing or newly created rental assistance programs.



Homeowner Assistance Fund

California is expected to receive \$1.055 billion through the ARPA's Homeowner Assistance Fund, which is being administered by the United States Treasury. The California Housing Finance Agency (CalHFA) will administer these funds as mortgage relief on behalf of the State of California.

Homeowners are eligible to receive amounts allocated to a HAF participant under the HAF if they experienced a financial hardship after January 21, 2020 and have incomes equal to or less than 150 percent of the area median income. HAF funds can be distributed only to a homeowner for qualified expenses on their primary residence.

Qualified expenses include:

- Mortgage payment assistance
- Financial assistance to allow a homeowner to reinstate a mortgage or to pay other housing-related costs related to a period of forbearance, delinquency, or default
- Mortgage principal reduction, including with respect to a second mortgage provided by a nonprofit or government entity
- Facilitating mortgage interest rate reductions
- Payment assistance for:
 - Homeowner's utilities, including electric, gas, home energy, and water
 - Homeowner's internet service, including broadband internet access service, as defined in 47 CFR 8.1(b) (or any successor regulation)
 - Homeowner's insurance, flood insurance, and mortgage insurance
 - Homeowner's association fees or liens, condominium association fees, or common charges
 - Down payment assistance loans provided by nonprofit or government entities
- Payment assistance for delinquent property taxes to prevent homeowner tax foreclosures
- Measures to prevent homeowner displacement, such as home repairs to maintain the habitability of a home or assistance to enable households to receive clear title to their properties

The U.S. Treasury has not finalized its guidance or allocations for this program.



2021-22 STATE HOMELESS-RELATED LEGISLATION

There are a number of bills related to homelessness currently under consideration by the Legislature in the 2021-22 Session. The table below outlines the bill and author, as well as short summaries of key provisions.

Legislation	Action	Summary Brief	Summary
AB 362 (Quirk-Silva) Homeless Shelters: Safety Regulations	In Process	Establishes health and safety standards for homeless shelters.	This bill would establish minimum health and safety standards for homeless shelters, including, but not limited to, minimum standards for homeless shelter maintenance, interior air quality, sleeping rooms, and laundries. The bill would require the housing, building, or health department of a local agency to serve as the enforcement agency and enforce the minimum health and safety standards within their jurisdiction.
AB 816 (Chiu) State and Local Agencies: Homelessness Plan	In Process	Requires the HCFC to conduct a statewide needs and gaps analysis regarding homelessness.	This bill, upon appropriation by the Legislature or upon receiving technical assistance offered by the federal Department of Housing and Urban Development (HUD), would require the Homeless Coordinating and Financing Council to conduct a statewide needs and gaps analysis to, among other things, identify State programs that provide housing or services to persons experiencing homelessness and create a financial model that will assess certain investment needs for the purpose of moving persons experiencing homelessness into permanent housing.
AB 977 (Gabriel) Homelessness Program Data Reporting: Homeless Management Information System	In Process	Requires the HCFC to better coordinate data into the local Homeless Management Information System.	The bill would require the HCFC to specify the format and disclosure frequency of the required data elements of its local Homeless Management Information System. The bill would apply the data entry requirements to all new State homelessness programs that commence on or after July 1, 2021. The bill would require the HCFC to provide technical assistance to any grantee or entity that operates a program subject to the bill, if the grantee or entity does not already collect and enter into the system.



<p>AB 1017 (Quirk-Silva) Public Restrooms: Right to Restrooms Act of 2021</p>	<p>In Process</p>	<p>Requires State agencies and local governments to compile and share information on restrooms available to the public.</p>	<p>This bill would require each State agency and local government to complete an inventory of public restrooms owned and maintained that are available to the general population. The bill would require local governments and State agencies to report their findings to the State Department of Public Health, which would compile the information in a report to the Legislature. The bill would require local governments and State agencies to make their inventories available to agencies and service providers that work directly with homeless populations and to make restroom location data available on their websites.</p>
<p>SB 344 (Hertzberg) Homeless Shelters Grants: Pets and Veterinary Services</p>	<p>In Process</p>	<p>Requires HCD to administer a program to provide pet and veterinary services for homeless individuals.</p>	<p>This bill would require HCD subject to an appropriation in the annual Budget Act, to develop and administer a program to award grants to qualified homeless shelters for the provision of shelter, food, and basic veterinary services for pets owned by people experiencing homelessness. The bill would authorize HCD to use up to 5% of the funds for those purposes for its costs in administering the program.</p>
<p>SB 400 (Jones) Homeless Children and Youths: Local Educational Agencies: Collaboration, Training, and Reporting</p>	<p>In Process</p>	<p>Requires collaboration between educational agencies and other partners on services to homeless children and youth.</p>	<p>This bill would require a local educational agency to include a school district, county office of education, charter school, or special education local plan area, to collaborate with other organizations that provide services to homeless children and youths to enhance the identification of, and the provision of services to, those children and youths. The bill would require these collaborations to include, but not necessarily be limited to, working with organizations that provide counseling services, social welfare services, meal and housing services.</p>
<p>SB 678 (Rubio) Unaccompanied Women Experiencing Homelessness Act of 2021</p>	<p>In Process</p>	<p>Requires the HCFC to assume responsibilities regarding women who are unaccompanied and homeless.</p>	<p>This bill would require the HCFC to assume additional responsibilities, including setting specific, measurable goals aimed at preventing and ending homelessness among unaccompanied women in the state and defining outcome measures and gathering data related to those goals.</p>



MEMO

To: City of Lafayette
City Council Legislation Committee

From: Townsend Public Affairs, Inc.

Date: June 14, 2021

Subject: AB 787 (Gabriel) Summary

Bill Information

The official text of AB 787 can be found [here](#).

Summary

AB 787 would authorize cities and counties to receive credit towards their regional housing need for the conversion of above moderate-income units to very low-, low-, and moderate-income units.

Specifically, the bill authorizes cities and counties to count any units in an existing multifamily building that are converted to deed restricted housing for very low-, low- or moderate-income households towards their share of the regional housing need as long as the following apply:

- The unit, at the time of conversion, is not rented at a cost affordable to very low-, low-, or moderate- low income households;
- The unit will have long-term affordability covenants and restrictions that require the unit to be affordable to persons of very low-, low-, or moderate- income for not less than 55 years;
- The initial rent for any post-conversion unit shall be at least 10 percent less than the average monthly rent charged over the 12 months prior to conversion;
- The unit is in decent, safe, and sanitary condition at the time of occupancy;
- The unit has not been acquired by eminent domain as part of the conversion;
- The unit is subject to a governmental monitoring program to ensure continued affordability; and,
- The city or county must have an assignable right to purchase the development or the investor's interest for debt plus taxes, unless the development is financed with low-income housing tax credits.

AB 787 specifies that if a city or county reports converted units pursuant to this bill, it shall subtract a corresponding amount from its existing above-moderate income total units. If such subtraction would cause the number of permitted above moderate-income units for that cycle to drop below zero, the jurisdiction must identify, within 180 days, an increase to its total site inventory zoned capacity for above moderate-income units by a commensurate amount.

AB 787 also specifies that a city or county could receive a unit-for-unit zoning reduction for conversions that occur prior to the jurisdiction's housing element adoption deadline, provided that the reduction does not exceed 25 percent.

Status

AB 787 was approved on the Assembly (78-0) on May 27th. The bill is currently in the Senate awaiting referral to policy committee.

Support

According to the author, "The preservation of affordable housing is a key policy tool to address California's housing crisis. Housing preservation helps promote and sustain communities by ensuring the ongoing availability of quality, affordable homes. AB 787 will create new flexible tools that can be used to support California's workforce, including teachers, firefighters, and nurses."

The creation of new affordable housing is the primary way to address the demand for housing created by California's housing crisis. However, conversion of existing market rate housing to deed restricted affordable housing can also address the need. While this approach does not help increase the overall housing stock, it does help target housing to those most in need. This approach is also cost-effective, being much less expensive than it currently costs to build a new affordable housing unit.

Supporters of AB 787 include: California Community Housing Agency; All Home; California Cities for Local Control; California Housing Consortium; Livable California; SPUR; Silicon Valley Leadership Group; Yimby Action

Opposition

There is no official opposition to AB 787.

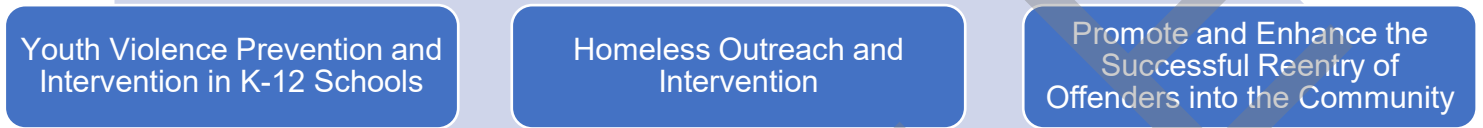
Recommended Action

Support

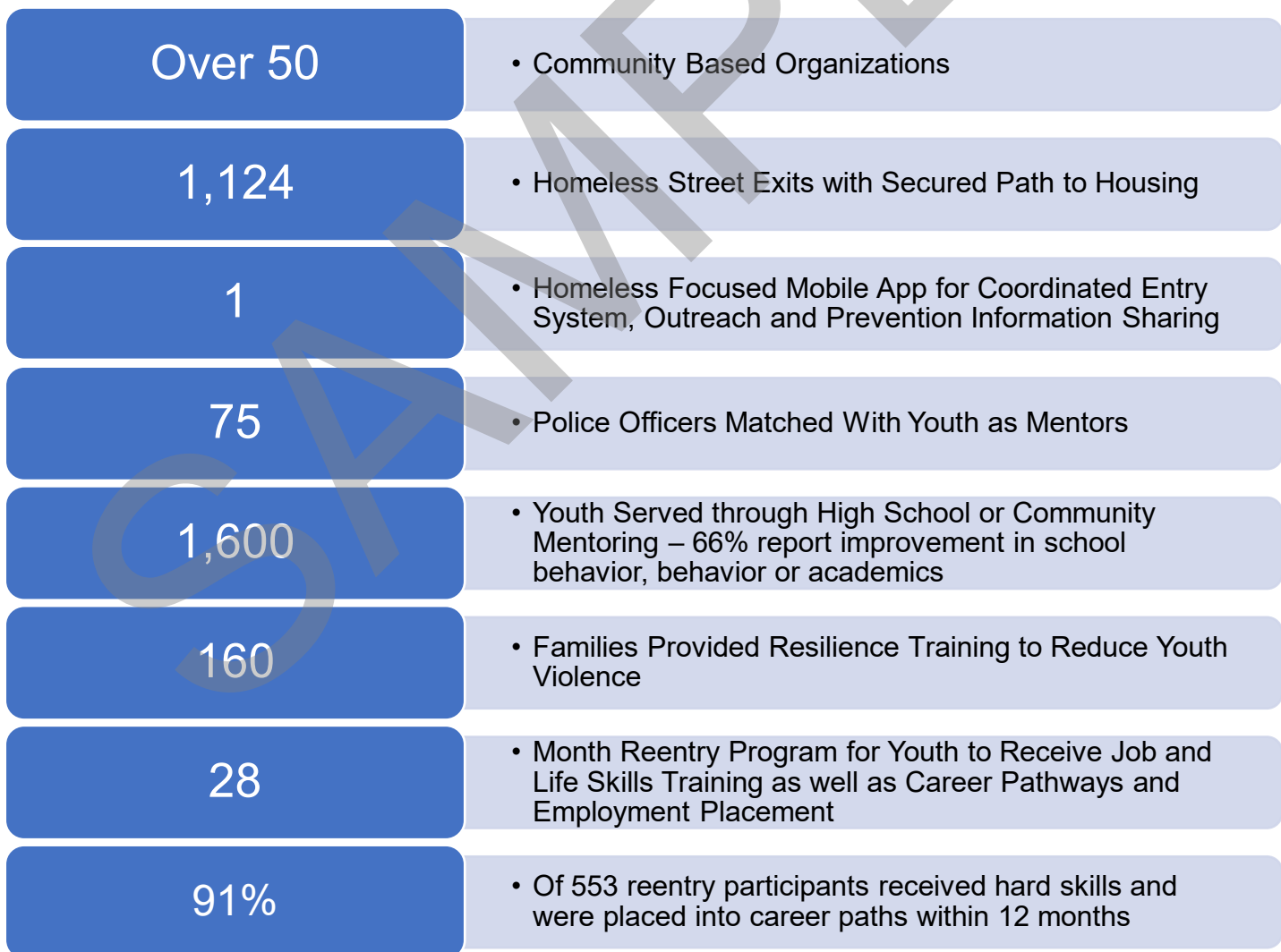


Formed in 2017 by AB 97 (Ting), the North Orange County Public Safety Task Force is a coordinated and regionalized effort amongst local law enforcement agencies, community based organizations and community members in the North Orange County cities of Anaheim, Brea, Buena Park, Cypress, Fullerton, La Habra, La Palma, Placentia, Stanton and Yorba Linda.

Focus Areas



Focus Area Results (2018-2019)





The Region

- The City of Anaheim
- The City of Brea
- The City of Buena Park
- The City of Fullerton
- The City of Placentia
- The City of Stanton

The Need

In 2015, crime in Orange County rose 23 percent. The above North Orange County region has identified two critical, high risk, target populations that are in desperate need of services: our youth and our homeless.

Programming Funding for Youth Gang Prevention and Intervention: The cities of Fullerton, Anaheim, Placentia, and Stanton are currently under or have previously been under a gang injunction. Our regional approach to combat gang membership and its consequences of crime, violence and substance abuse is to be proactive in distracting youth from the allure of gangs and supplying them with the skills and support to make positive life choices.

Funding for Homeless Outreach and Intervention Efforts: The County of Orange released the 2017 Point in Time (PIT) count on May 12, 2017 which reveals a 7.6 percent increase of the homeless population in Orange County since the 2015 PIT count. The 2017 PIT count also estimates that Orange County has a homeless population of 4,792.

Over the last several years there has been a staggering increase in emergency service calls relating to the homeless population. A primary goal of the task force will include educating the homeless on the City, County and nonprofit organization services that are available to them in their community.

The Project

The Project will create a Six City Task Force that will be responsible for addressing the two critical public safety issues in this region: youth gang prevention and intervention and homeless outreach and intervention.

Neither issue, gangs nor homeless, recognize City boundaries. It is critical that a regional approach is taken to allocate resources to keep our communities safe, to prevent gang membership and to provide homeless assistance. Regional collaboration among these six cities will create a powerful opportunity to target these high-risk populations and provide services to keep our communities safe.

The City of Buena Park will serve as the program administrator and fiscal agent for the Six City Task Force. The Task Force will consist of the Police Chief or a designated representative from each individual City. Funding shall be used for the following two purposes: (1) programming funding for youth gang prevention and intervention and (2) funding for homeless outreach and intervention.

The Cost

Regional Program for Youth Gang Prevention and Intervention and Homeless Outreach and Intervention: \$20 million.

April 12, 2021

Assemblymember Phil Ting
Assembly Budget Committee, Chair
California State Assembly
State Capitol
Sacramento, CA, 95814

RE: Budget Request for Economic and Educational Recovery

Dear Chair Ting,

As the State focuses on economic recovery from the impacts of the COVID-19 pandemic, it is critical that there is a strong emphasis on our youth and how we can recover from the lost year of educational engagement. Funding is needed to address the impacts on students, teachers, and their families, by providing hands on science-based education in an engaging way. Discovery Cube Orange County is perfectly positioned to help the much needed educational recovery in in our State. DCOC is a critical link to providing continued education to students and teachers outside of school, as well as opportunities for their families to promote learning and education outside of school.

Due to the impacts of the pandemic and the current State of Emergency, DCOC has been closed for much of the last year. DCOC attempted to reopen briefly last summer when they were given the green light, but quickly closed again when the impacts of the pandemic continued to increase. There are significant operational costs that DCOC must incur in order to reopen, including rehiring and training staff, increasing health and safety measures in the museum, operations of the exhibits and securing funding to pay for costs such as staffing, utilities, marketing and advertising, and other support features of the museum. Since DCOC has had no forms of revenue for the past year, the expenditures to open would drain all current reserves leaving no room to operate the entity going forward. **As such, I am requesting legislative directed funding in the amount of \$2,036,000 to provide DCOC with the needed funds to reopen in a safe manner.**

Researchers have found that the most affected communities from the pandemic tend to have lower incomes and live in dense areas. In Orange County, Santa Ana has had the highest infection rate in the County with the fastest growth in COVID cases. Due to these impacts in the County, the pandemic forced schools to go to distance learning programs which dropped their ability to teach in a hands-on format. This was specifically devastating in the area of science where academic progress was lost because teachers could no longer teach to the 2018 California's Next Generation Science Standards which required teachers to teach through experimentation not just memorization of terms. Additionally, the pandemic exacerbated opportunity gaps, especially in the hardest hit areas of the State like Santa Ana, that put low-income students at a disadvantage relative to their better-off peers. The impacts on minorities and students that live in poverty have been significant, and it is entities like the Discovery Cube that can help our State take the steps needed to close the gap and start to make progress on our educational recovery.

DCOC has the expertise, the resources, the partnerships, the mission, and the tools to help bridge the educational gap, rebuild the system to ensure all children have access to the resources that enhance learning and development, bring science-based learning back to this extremely vulnerable community, and help with the educational recovery of our State. We appreciate your time and attention to this matter and respectfully request that State funding be made available to Discovery Cube Orange County to allow them to reopen in a safe manner.

SAMPLE

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COMMITTEES
CHAIR: NATURAL RESOURCES
BUDGET
HEALTH
LOCAL GOVERNMENT
REVENUE AND TAXATION
BUDGET SUBCOMMITTEE NO. 3 ON
RESOURCES AND TRANSPORTATION
JOINT COMMITTEES
BUDGET
EMERGENCY MANAGEMENT

April 12, 2021

Assemblymember Phil Ting
Assembly Budget Committee, Chair
California State Assembly
State Capitol
Sacramento, CA, 95814

RE: Budget Request for Economic and Educational Recovery

Dear Chairman Ting:

Thank you for your continued leadership as we work through these unprecedented times. As the Legislature considers budget expenditures, please consider the following request:

- \$2.6 million to provide Discovery Cube Los Angeles with the needed funds to reopen in a safe manner

Background: As the State focuses on economic recovery from the impacts of the COVID-19 pandemic, it is critical that there is a strong emphasis on our youth and how we can recover from the lost year of educational engagement. Funding is needed to address the impacts on students, teachers, and their families, by providing hands on science-based education in an engaging way. Discovery Cube Los Angeles (DCLA) is perfectly positioned to help the much-needed educational recovery in Los Angeles County, the hardest hit county in California. DCLA is a critical link to providing continued education to students and teachers outside of school, as well as opportunities for their families to promote learning and education outside of school.

Due to the impacts of the pandemic and the current State of Emergency, DCLA has been closed since March 2020. There are significant operational costs that DCLA must incur in order to reopen, including rehiring and training staff, increasing health and safety measures in the museum, and operating of the exhibits. Since DCLA has had no forms of revenue for the past year, the expenditures to open would drain all current reserves leaving no room to operate the entity going forward. As such, I am requesting legislative directed funding in the amount of \$2,600,000 to provide DCLA with the needed funds to reopen in a safe manner.

DCLA is located in the heavily urbanized San Fernando Valley, a region with an estimated population of 1.8 million people, and within the County of Los Angeles, which is home to more than 10 million people. The San Fernando Valley is also a region where poverty remains a significant barrier, with approximately one third of the population living at or below the poverty level and 10 percent of households reporting incomes of \$15,000 per year or less. In Los Angeles County, a COVID-19 hotbed, five of the 25 communities with the highest infection rates are in the northeast San Fernando Valley — where many cities have an infection rate two times greater than that of LA County.

The pandemic has forced schools to go to distance learning programs, which dropped their ability to teach in a hands-on format. This was specifically devastating in the area of science where academic progress was lost because teachers could no longer teach to the 2018 California's Next Generation Science Standards which required teachers to teach through experimentation not just memorization of terms.

Assemblymember Philip Ting, Chair, Assembly Budget Committee

April 12, 2021

Pg.2

Additionally, the pandemic exacerbated opportunity gaps, especially in the hardest hit areas of the State like Los Angeles, which put low-income students at a disadvantage relative to their better-off peers. In Los Angeles Unified School District, the nation's second largest District after New York City, the vast majority of the roughly 600,000 students have spent 0 days in the classroom for the past 365 days. The impacts on minorities and students that live in poverty have been significant, and it is entities like the Discovery Cube that can help our State take the steps needed to close the gap and start to make progress on our educational recovery.

DCLA has the expertise, the resources, the partnerships, the mission, and the tools to help bridge the educational gap, rebuild the system to ensure all children have access to the resources that enhance learning and development, bring science-based learning back to this extremely vulnerable community, and help with the educational recovery of our State.

I appreciate your time and attention to this matter and respectfully request that State funding be made available to Discovery Cube Los Angeles to allow them to reopen in a safe manner. Please contact me at (916) 319-2039 if you would like to discuss this further.

Thank you for your consideration of this important proposal.

Respectfully,



LUZ RIVAS

Assemblywoman, 39th District

LR: mm

SAMPLE