



CALCOG Scope of Work

I. OVERVIEW OF SCOPE DELIVERABLES, BUDGET & ACCOUNTING

A. Cost by Deliverable:

Item	Deliverable	Amt	Cost/Item	Budget
1. Legal White Paper Summaries	White papers	6	\$12,500.00	\$75,000.00
2. HIP Exchange Curated Web Links	Link Sets	16	\$2,750.00	\$44,000.00
3. Housing Webinars	Webinars	3	\$2,200.00	6,600.00
4. RLF Conference: Housing Focus Sessions	Sessions	5	\$4,100.00	\$20,500.00
5. SJV Issue Assessment	Report	1	\$13,942.87	\$13,942.87
6. SJV Housing Practice Information Packets	Packets	8	\$3,400.00	\$27,200.00
Total				\$187,242.87

B. Cost by Expense Category

Item	Budget
1. Staffing	\$176,800.00
2. Design Graphics	\$5,192.87
3. Facilities and Equipment Fees	\$4,750.00
4. Travel	\$500.00
Total	\$187,242.87

C. Fully Loaded Staff Rates

Employee	Rate
Sr. Policy Director	\$246.76
Policy Program Mgr A	\$135.04
Policy Program Mgr B	\$129.54
Analyst A	\$102.52
Analyst B	\$102.29

D. Details Regarding Accounting

- Invoices will Be Based on Staff Hours Worked and Limited Direct Expenses Identified in this Scope of Work.** The cost per item above is an estimate. Most of the expenses will result from staff time spent on developing the material listed above based. As a result, CALCOG invoices will include a time accounting for each deliverable. Actual expenses invoiced may vary slightly for each deliverable, but the total invoiced shall not exceed \$187,242.87.
- Calculation of an Hourly Rate.** CALCOG uses a fully loaded hourly rate that includes salaries and wages, benefits, and administrative overhead. Administrative costs include rent, utilities, human resource costs, oversight and management, insurance, accounting, software, and office equipment. Here are the rates for the individual employees that are included in the invoice.
- Time Tracking.** CALCOG uses Harvest, an online a self-reporting time tracking system that includes a line item for work under the REAP Technical Assistance. Staff logs their time under this category each week. The total amount of hours logged by an employee multiplied by their fully loaded hourly rate equals the total amount of billable time completed by the employee. (Note that CALCOG used the same methodology in a subcontracting role for a now-expired contract that was authorized by the Department of Housing and Community Development for REAP technical assistance. All hours and staff time reported and invoiced under this contract occurred after the termination of this contract.

II. DETAIL DESCRIPTION OF DELIVERABLES

A. Deliverable 1: Legal White Paper Summaries (Six)

Description: Production of legal white paper summaries that serve as a reference for each of the 6 subjects listed below. Each white paper should be written in plain English and include accurate citations and references in a way that does not interfere with the reading. Where applicable, the white paper should include visuals that help explain complex areas of the law. The length of the white papers should average 10 pages or more.

Each white papers must be based on: (1) a review of HCD Guidance documents, including finding letters from the Housing Accountability Unit; (2) a review of technical assistance developed by regional councils of governments; (3) statutes, (4) a review of case law; and (5) other resources identified in our research efforts, including general internet research.

The white papers shall be formatted and designed to make them attractive for the public to access. Each document will be delivered in a downloadable format and posted on a website that is generally accessible to regional governments and the public at large.

Output: Six Formatted and Designed White Papers (approximately 60 pages):

- *Regional Housing Needs Assessment process*
- *Housing Element*
- *Permit Streamlining, Housing Accountability Act, & Housing Crisis Act*
- *Density Bonus Law*
- *SB 35 Streamlining*
- *Enforcement of State Housing Laws*

Cost. The cost of production is provided below. Although actual costs may vary, the total cost for this deliverable will not exceed the total budgeted amount provided below unless approved by (party name as listed in contract).

Item or Category	Cost
Staffing (Sr Policy Expert & Policy Manager)	\$73,000.00
Graphic Design Fees	\$ 2,000.00
Total	\$75,000.00
<i>Average cost per white paper: \$12,500</i>	

B. Deliverable 2: Curated Web Links for Housing Issue Areas (Sixteen)

Description. Design a well-designed web platform that will serve as a general resource for local and regional governments seeking technical information about housing policy implementation. The platform should allow users to easily navigate to areas of specific interest, like the Regional Housing Needs Allocation process, Housing Element, or Density Bonus. Each area of specific interest shall include curated set of hyperlinks (or a “link set”)

that provide access to documents that taken together, provide users with all the general information they would need to understand their obligations.

Each document shall be on a server or cloud-based storage system controlled by CALCOG to assure long-term access. The link set for each subject should represent a helpful and authoritative set of resources that although complete, do not to overwhelm the user by providing too much information. In other words, CALCOG's role is to review multiple resources to select the best few that assure the link set is both complete and accessible. Each link set shall provide the user with a fuller view of the legal area than what a single summary would provide on its own.

Research and identify potential resources, including technical assistance documents provided by regional agencies, HCD Guidance and determinations, legal opinions. Additionally, CALCOG will also provide graphic and web design and assure that the site remains hosted (and all links remain working) for at least two years.

Output: Link Set Subjects: An updated, well designed, and accessible web portal that includes the follow subject areas:

- | | |
|---|--|
| 1. Regional Housing Needs Allocation | 10. Accessory Dwelling Units |
| 2. Housing Element | 11. Fairness and Equity |
| 3. CEQA Streamlining & Exemptions | 12. Affirmatively Furthering Fair Housing |
| 4. Density Bonus Law | 13. Retention of Existing Affordable Housing |
| 5. Religious & Educational Institution Projects | 14. Enforcement of Housing Laws |
| 6. Commercial, Office & Retail Projects (AB 2011) | 15. Summary of REAP 1 COG technical assistance |
| 7. Streamlined Ministerial Approval Process | 16. Permit Streamlining, Housing Accountability, and Housing Crisis Acts |
| 8. Small Lot Developments | |
| 9. Lot Splits | |

Cost. The cost of production is provided below. Although actual costs may vary, the total cost for this deliverable will not exceed the total budgeted amount provided below unless approved by (party name as listed in contract).

Item or Category	Cost
Staffing (Sr Policy Director, Policy Manager, & Analyst)	\$42,000.00
Graphic Design Fees	\$ 2,000.00
Total	\$44,000.00
<i>Average cost per link set: \$2,750</i>	

C. Deliverable 3: Curriculum Development (Only) for Webinar Series

Description. Development of three publicly available housing webinars focusing on housing law updates, RHNA reform, and VMT (vehicle miles traveled) and housing policy. Webinar preparation includes reviewing and researching the issue and materials, recruiting speakers, preparing speakers, providing a process for online registration, marketing and announcements, creating online resources for follow up materials, and designing the web space to house the information. CALCOG will also record the webinars and keep it posted on our website for at least two years or less if the law changes to the extent that information offered on the webinar has become obsolete or incorrect.

Output: Three Webinars, including video replay and slides and supplementary materials. One each on Housing Law Update, RHNA Reform, and VMT and Housing Preparation.

Cost. The cost of production is provided below. Although actual costs may vary, the total cost for this deliverable will not exceed the total budgeted amount provided below unless approved by (party name as listed in contract).

Item or Category	Cost
Staffing (Senior Policy Director, Policy Manager, & Analyst)	\$6,300.00
Graphic Design Fees	\$ 300.00
Total	\$6,600.00
<i>Average cost per link set: \$2,200</i>	

D. Deliverable 4: Leadership Forum Housing Sessions:

Description: Develop and design housing policy and REAP-aligned content developed and delivered at CALCOG's Regional Leadership Forum, including (1) *VMT Mitigation Banking as a Strategy for Infill*; (2) *Infrastructure Resilience* (that includes a housing example), (3) *Emerging Regional Housing Trusts for Affordable Housing* (4) *The Power of Regional Collaboration* (that includes a housing example); and (5) *How Regions are Supporting Housing Element Implementation*. Preparation includes general research and issue review, session planning, identifying and working with speakers, and developing a facilitation plan for sessions with multiple speakers. Cost also includes a proportional share of the facility and AV rentals (and specifically excludes any and all cost associated with food, beverage, or networking events that are also available at the conference).

Output: Five Sessions at the Regional Leadership Forum that either focuses on housing policy or features a housing solution related to the topic. The subjects are *VMT Mitigation Banking as a Strategy for Infill*, *Infrastructure Resilience*, *Emerging Regional Housing Trusts for Affordable Housing*, *The Power of Regional Collaboration*, and *How Regions are Supporting Housing Element Implementation*.

Cost. The cost of production is provided below. Although actual costs may vary, the total cost for this deliverable will not exceed the total budgeted amount provided below unless approved by (party name as listed in contract).

Item or Category	Cost
Staffing (Senior Policy Director, Policy Manager, & Analyst)	\$15,500.00
Facility Fees & Audio Visual (Pro Rata Share)	4,750.00
Graphic Design Fees	\$ 250.00
Total	\$20,500.00
<i>Average cost per link set: \$4,100</i>	

E. Deliverables 5 & 6: San Joaquin Valley Outreach & Technical Assistance

Description: A two-step process for provided targeted technical assistance in the San Joaquin Valley. The first step is to assess which technical assistance resources would be most value to the regional entities and local communities in the San Joaquin Valley. The second step would be to provide packets of the most valuable information packets to the regional governments based on the white papers, web links, and other materials produced or identified by CALCOG.

Assessment Output. Conduct surveys and interviews to get feedback on the what resources would be of most value to SJV region. The survey will: (1) identify which resources already published would be of most value to the San Joaquin Valley and then identify the best ways to highlight the availability of these resources to stakeholders; and (2) identify issue area gaps that can be worked that would improve the value of future technical assistance materials for San Joaquin Valley communities.

County Specific Information Packet Output. Based on the assessment, CALCOG provides informational packets that include information, education materials and strategies, and other promotional templates that the regional agencies in the San Joaquin Valley can use to increase the awareness of the availability of technical assistance materials.

Cost. The cost of production is provided below. Although actual costs may vary, the total cost for this deliverable will not exceed the total budgeted amount provided below unless approved by (party name as listed in contract).

Item or Category	Cost
Staffing (Senior Policy Director, Policy Manager, & Analyst)	\$40,000.00
Travel	\$ 500.00
Graphic Design Fees	\$ 642.87
Total	\$41,142.87
<i>Assessment: \$13,942.87; Average cost per Information Packet: \$3,400</i>	