CITY OF BELMONT
CITY COUNCIL

www.belmont.gov

CITY COUNCIL REGULAR MEETING AGENDA
Tuesday, September 10, 2024
6:00 PM
City Council Chambers
City Hall, One Twin Pines Lane, Belmont, California

MEETING ATTENDANCE:
Council meetings, unless otherwise noted, are broadcast live to Belmont residents on

1. Comcast Cable Channel 27
2. Streamed live via the City's website at Belmont.gov,
3. ZOOM https://belmont- gov.zoom.us/ **Meeting ID: 95745673035**
4. Attend the meeting in the Council Chambers, Belmont City Hall 2nd floor

PUBLIC COMMENT:

- Public in the Council Chamber present the Clerk a request to speak slip found at the table at the rear of the chamber.
- If participating virtually use the Raise Hand feature to request to speak.
    - For dial- in comments, call *67 1-(669) 900-6833 (your phone number will appear on the live broadcast if *67 is not dialed prior to the phone number),
    - enter **Meeting ID: 95745673035**, and press *9 to request to speak.

All public comments are subject to a **3-minute time limit** unless otherwise determined by the Chair.

If you wish to submit written public comment, you may send an email to cclerk@belmont.gov before the council considers the item. Please indicate the agenda item topic or agenda item number you wish to comment on in your email's subject line. Any public comment regarding agenda items that are received from the time of publication of the agenda and 3 hours before the start of the meeting will be distributed to the Council prior to the meeting and made part of the meeting record. Written public comments will not be read during the Council meeting.

The Mayor has the authority to rule any speaker out of order, including speakers during the Public Comment period; If the subject raised is not within the subject matter jurisdiction of the City Council, during a public hearing or a general business item if the speaker is not presenting testimony or evidence relevant to the matter or if the speaker becomes disruptive to the proceedings and conduct of the meeting.

The Mayor also has the authority to order any person who willfully interrupts the meeting to be removed. All persons are expected to conduct themselves with civility and courtesy at all times. All

persons giving comments shall speak directly to the Council and address issues, not individuals. Personal attacks, cursing and outbursts from the audience in support or opposition to a speaker are not tolerated in order to foster an environment where everyone feels welcome to speak.

SPECIAL MEETING AGENDA [6:00 PM]

1. CALL TO ORDER
A. Roll Call

2. CLOSED SESSION (6:00 PM]

A. **Conference with Labor Negotiators (Government Code Section 54957.6)**
Agency designated representatives: Davina Hurt and Robin Pang-Maganaris; Unrepresented Employees: City Manager, City Attorney

B. **Conference with Labor Negotiators (Govt Code Section 54957.6)**
Agency designated representatives: Afshin Oskoui, City Manager
Employee organization: American Federation of State, County and Municipal Employee (AFSCME), Mid-Management Confidential Employee Association (MMCEA) and Belmont Police Officers Association (BPOA)

3. STUDY SESSION (none)

REGULAR MEETING AGENDA [7:00 pm]

4. CALL TO ORDER
A. Roll Call

5. PLEDGE OF ALLEGIANCE

6. REPORT FROM CLOSED SESSION

7. SPECIAL PRESENTATIONS

A. **Proclamation Designating September as Suicide Prevention Month**

B. **Proclamation Designating September 15 to October 15, 2024 as National Hispanic Heritage Month**

C. **Proclamation National Preparedness Month**

D. **National Night Out Recap**

E. **Presentation of *MyBelmont* - a new 311 Citizen Reporting App and Web Portal**

F. **Presentation of Certificate of Appreciation**

8. PUBLIC COMMENTS ON ITEMS NOT ON THE AGENDA
This portion of the meeting is reserved for persons wishing to address the Body on any City matter not on the agenda. The period for public comment at this point in the agenda is limited to 15 minutes, with a maximum of 3 minutes per speaker. Speakers who requested but did not receive an opportunity to speak during this comment period will be given an opportunity to address the Body later in the meeting. State law prohibits the Body from

acting on non-agenda items.

9. COUNCILMEMBER ANNOUNCEMENTS

10. CONSENT BUSINESS

Consent business items are considered to be routine in nature and will be enacted by one motion. There will be no separate discussion on these items unless a member or staff request specific items to be removed for separate action. The City Attorney will read the title of ordinances to be adopted.

A. **Approval of Minutes**
Recommendation: Consider modifications and approve minutes.

Attachment(s):
July 23, 2024 Meeting Minutes

B. **Banking Services Contract Amendment with Wells Fargo Bank**
Recommendation: Adopt a motion authorizing the City Manager to negotiate and execute a contract agreement amendment with Wells Fargo Bank for banking services consistent with the 5-year fee schedules included with this staff report and any other related documents, to take such actions as are necessary to implement and administer the agreement amendment

Attachment(s):
Staff Report
Wells Fargo Bank 5-Year Fee Schedules, City of Belmont and Belmont-San Carlos Fire Department

C. **0 Longfellow Drive Permanent Encroachment Agreement**
Recommendation: Adopt a resolution approving a Permanent Encroachment Agreement for a retaining wall within the public right-of-way at 0 Longfellow Drive (APN 043-222-350)

Attachment(s):
Staff Report
Resolution
Exhibit A - Permanent Encroachment Ret Wall

D. **Demolition of City-Owned Properties Project, City Contract Number (CCN) 2023-626, Notice of Completion**
Recommendation: Adopt a resolution accepting work and authorizing the issuance of a Notice of Completion for the Demolition of City-Owned Properties Project, City Contract Number 2023-626, for a final contract cost of $106,390

Attachment(s):
Staff Report
Resolution

E. **Appropriation of Street Improvement Fund (Measure A) and Amendment 2 to the Architectural and Engineering Services Agreement with Kimley Horn for the Ralston Avenue Adaptive Signal Control Technology System Project**
Recommendation: Adopt a resolution appropriating $28,990 of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project and authorizing the City Manager to execute Amendment 2 to the agreement with Kimley-Horn and Associates, Inc. (Kimley-Horn) for additional services to prepare updated background signal coordination plans for the traffic signals on Ralston Avenue between 6th

Avenue and the US-101 SB Ramps for an amount not to exceed $28,990, bringing the total agreement to a not to exceed amount of $301,770

Attachment(s):
Staff Report
Resolution

F. **Belmont Library Exterior Improvement**
Recommendation: Adopt a motion authorizing the City Manager to negotiate and execute a contract with Staples Construction Company for $123,594.51 plus a 15% contingency (total $142,133.69) for the painting of the exterior of the Belmont Library, City Contract Number 2024-632

Attachment(s):
Staff Report
Presentation
Construction Contract
Scope of Work
Invitation for Bids
Sourcewell Contract
General Conditions

11. PUBLIC HEARINGS

A. **Adoption of the Revised Housing Element 2023-2031**
Recommendation: Adopt a resolution making findings that the revised 2023-2031 Housing Element is consistent with Housing Element Law, and that the Housing Element as revised is consistent with the program EIR prepared for the project and no further environmental document is required, and amending the 2035 General Plan by repealing the previously adopted 2023-2031 Housing Element and adopting the revised 2023-2031 Housing Element

Attachment(s):
Staff Report
Resolution
HCD Letter July 26 2024
Draft Housing Element July 2024
AppA_Needs Analysis
AppB_sites-inventory-template Belmont
AppC_AFFH
AppD_PrevHE
AppE_Outreach

12. GENERAL BUSINESS

General Business items are considered separately, typically in the order listed. The chair will call for public comment on each item when the body considers the item.

A. **Review Solid Waste Rate Application and Revise Maximum Rates for Collection Services for 2025**
Recommendation: Adopt a resolution stating the City of Belmont's intent to revise the maximum rates that may be charged for solid waste, recyclable materials, and organic materials collection services effective January 1, 2025, and set a Public Hearing date for November 12, 2024

Attachment(s):

Staff Report
Resolution
Attachment B - Recology 2025 Rate Application
Attachment C - HDR Inc Report - Solid Waste Rate Analysis

B. **Twin Pines Park Stormwater Detention Basin EIR Certification**
Recommendation: Adopt a resolution certifying the Final Environmental Impact Report (EIR), making the findings required by the California Environmental Quality Act (CEQA), adopting the Mitigation Monitoring Program (MMRP), and adopting the Statement of Overriding Considerations for the Twin Pines Park Stormwater Detention Basin Project (Project)

Attachment(s):

Staff Report
Resolution

C. **First Amendment to Employment Agreement between the City of Belmont and City Attorney Scott M. Rennie**
Recommendation: Adopt a resolution establishing compensation for the City Attorney; and authorizing the Mayor to execute Amendment No. 1 to the City Attorney employment agreement

Attachment(s):

Staff Report
Resolution
First Amendment to CA Agreement

D. **Second Amendment to the Employment Agreement Between the City of Belmont and City Manager, Afshin Oskoui**
Recommendation: Adopt a resolution establishing compensation for the City Manager; and authorizing the Mayor to execute Amendment No. 2 to the City Manager employment agreement

Attachment(s):

Staff Report
Resolution
Second Amendment to CM Agreement

13. BRIEF VERBAL REPORTS FROM MEMBERS AND STAFF

A. **Verbal report from Councilmembers on Intergovernmental (IGR) and Subcommittee Assignments**
B. **Verbal report from City Manager**

14. MATTERS OF INTEREST/CLARIFICATION

Items in this category are for discussion and direction to staff only. However, Council/Board may take final action on an item if there is no need for additional staff analysis.

15. ADJOURNMENT

If you need assistance to participate in this meeting, please contact the City Clerk at (650) 595-7413. Notification in advance of the meeting will enable the City to make reasonable arrangements to ensure accessibility to this meeting. Meeting information can also be accessed via the internet at: www.belmont.gov. All staff reports will be posted to

the web in advance of the meeting, and any writings or documents provided to a majority of the City Council/District Board or Commission regarding any item on this agenda will be made available for public inspection in the City Clerk's Office, One Twin Pines Lane, during normal business hours and at the Council Chambers at City Hall, Second Floor, during the meeting.

AGENDA POSTING: I declare a copy of this agenda was posted at City Hall, One Twin Pines Lane, and the City's website www.belmont.gov on ,by . /s/

MINUTES OF CITY OF BELMONT CITY COUNCIL SPECIAL AND REGULAR MEETING
City Council Chambers, City Hall, One Twin Pines Lane, Belmont, California

Tuesday, July 23, 2024

CALL TO ORDER: 6:00 PM

ROLL CALL
COUNCILMEMBERS PRESENT: McCune, Hurt, Pang-Maganaris, Mates, (Latimerlo arrived at 6:30pm)
COUNCILMEMBERS ABSENT: None

CLOSED SESSION [6:15 PM]

Public Employee Performance Evaluation Government Code Section 54957(b)

Titles: City Manager, City Attorney

Conference with Labor Negotiators (Government Code Section 54957.6); Agency designated representatives: Davina Hurt and Robin Pang-Maganaris; Unrepresented Employees: City Manager, City Attorney

Recess to regular meeting at this time being 6:50 pm.

REGULAR MEETING

PLEDGE OF ALLEGIANCE
Led by Mayor Mates

REPORT FROM CLOSED SESSION
Closed session was recessed report will be given at the of the agenda.

SPECIAL PRESENTATIONS (None)

PUBLIC COMMENTS ON ITEMS NOT ON THE AGENDA
Giuliano Carlini commented on cycling infrastructure in the city.
ZOOM caller requested clarification on public comments.

COUNCILMEMBER ANNOUNCEMENTS
Councilmember Hurt announced her appointment to Chair of the Silicon Valley Clean Water (SVCW) Joint Powers Authority (JPA).
Mayor Mates announced upcoming events.

DRAFT

CONSENT BUSINESS

Meeting Minutes of City Council July 9, 2024, and BFPD July 9, 2024
Monthly Financial Reports - June 2024
Purchasing Ordinance
Ordinance 2024-1179 Of The City Of Belmont Amending Regulations In The Belmont City Code Related To Purchasing And City Manager And City Attorney Contract Authority
Resolution 2024-58 authorizing the City Manager to negotiate and execute Amendment No. 5 to the Service Agreement with 4 Leaf, Inc. to provide building inspection services for $100,000, for a total not-to-exceed amount of $449,865

No public comment received on the Consent Business items.

City Attorney Rennie read the title of **Ordinance 2024-1179** Of The City of Belmont Amending Regulations In the Belmont City Code Related to Purchasing and City Manager and City Attorney Contract Authority.

ACTION: On a motion made by Councilmember Hurt and seconded by Vice Mayor Latimerlo, the Consent Business items were approved by a roll call vote (5-0).

PUBLIC HEARINGS (None)

GENERAL BUSINESS

Stanford Belmont Campus Conceptual Development Plan and Development Agreement - Project Update and City Council Discussion

Deputy Community Development Director Russell presented the project status update from the City Staff and Applicant regarding the Stanford Belmont Conceptual Development Program Plan and Development Agreement.

Steve Elliot, Stanford Senior Managing Director of Real Estate, and John Donahoe Senior Director for Planned Entitlement Stanford Real Estate presented the development plans for the potential Belmont site. He explained that those 46 acres of the campus is the intent of Stanford's purchase. He also noted that NDNU Elementary and High School are not part of the purchase. He explained that up to 700,00 square feet will be developed, maintaining the properties academic use, providing affiliate housing, and keeping open access to outdoor spaces. He noted that the renovation of Ralston Hall is included in the plan. He explained that the potential campus population is to be similar to NDNU at total capacity in 2013.

Council discussion ensued.

Public Comment provided by Beth Martin, Giuliano Carlini, Grail Walsh, and Margaret Judala

Council direction was to review contributions to community benefits, namely contributions to the Barrett Community Center Upgrades and, future traffic impacts from the project.

RECESS: 8:20 PM
RECONVENE: 8:30

Zoning Text Amendments - Corridor Mixed Use District, Parking, and By Right Processing

Deputy Community Development Director Russell made a presentation on proposed Zoning Text Amendments related to development standards in the Corridor Mixed Use (CMU) District; consolidation of parking requirements into one section of the Zoning Ordinance; and updates to facilitate "by right" processing as required by State Law.

She noted the following proposed changes to the development standards in the CMU District: Increasing the base height from 45' to 50' will encourage ground-floor commercial uses and make four-story office development feasible. An increase to the community benefits height from 55' to 60' so that commercial projects have an approval pathway through City Council if the community benefits outweigh potential impacts. And an establishment of unique development standards for hotels of 2.5 FAR and 65' height to provide an incentive for this fiscally positive land use.

She also noted the following changes to the consolidation of parking requirements into one section of the zoning ordinance with the proposed changes adding narrative standards to tables format, changing units of measurement to modern standards, such as linking requirements to physical measurements (like floor area) instead of things that might change (like employees). Removing outdated land uses and revising the approval criteria for applications that would increase parking above the maximum or below the minimum—updating language to be consistent with AB 2097, which preempts parking requirements within one-half mile of the Caltrain station and simplifies loading requirements.

Council discussion ensued.

Public comment received from Neel Patel and E-mail correspondence was received.

Council Concurred with staff recommendation, no other action taken.

Informational Update on Unmanned Aerial System

Police Captain Armando provided an update on the use of unmanned aerial systems. He highlighted their applications, including managing and containing urban and open space fires, assisting in the search for missing persons, and monitoring and managing critical incidents. He highlighted the usage of other departments, including Public Works, during street construction and Parks and Recreation, in viewing tree canopy and open space areas.

Public comment provided by Giuliano Carlini.

Council discussion ensued. The council concurred with the report and expressed the need for transparency and privacy and a robust data retention policy for the use of the systems.

BRIEF VERBAL REPORTS FROM MEMBERS AND STAFF

Verbal report from Councilmembers on Intergovernmental (IGR) and Subcommittee Assignments

Councilmembers reported on their assignments.

Verbal report from City Manager

City Manager Oskoui announced that the new Public Works Director will start in the coming days, and Interim Director Towne has successfully completed his assignment.

MATTERS OF INTEREST/CLARIFICATION-none

Recess at this time being 10:05 pm to continuation of closed session item.

Adjournment at this time being 11:24 p.m.

Submitted by,
Jozi Plut, City Clerk

DRAFT

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Grace Castaneda, Finance Director, gcastaneda@belmont.gov; Nawel Voelker, Management Analyst, nvoelker@belmont.gov
Agenda Title:	Banking Services Contract Amendment with Wells Fargo Bank
Agenda Action:	Motion

Recommendation

Adopt a motion authorizing the City Manager to negotiate and execute a contract agreement amendment with Wells Fargo Bank for banking services consistent with the 5-year fee schedules included with this staff report and any other related documents, to take such actions as are necessary to implement and administer the agreement amendment.

Strategic Focus Area

Fiscal and Organizational Sustainability

Background

In 2014, City Council approved a contract with Wells Fargo Bank to provide banking services for the City based on a monthly fee schedule. Wells Fargo has a physical presence in the City of Belmont, adequate financial strength and credit rating, and experienced staff in providing banking services to public agencies with similar banking needs as the City. The City is currently at the end of the current contract with Wells Fargo and an amendment is necessary in order to continue services without interruption.

Analysis

For the past ten years, Wells Fargo has provided a quality level of service to the City, including financial transaction options and online reporting tools that help keep day-to-day operations running smoothly and efficiently. Furthermore, Wells Fargo has been consistent in the protection of public funds, providing safety and liquidity that is in accordance with the City's priorities in its investment policy. Wells Fargo also provides a dedicated servicing team to the City, along with branch locations for convenient access. Wells Fargo currently manages relationships with over 750 public entities and over $2.6 billion in public fund deposits in California.

The proposed contract amendment will be based on the fee schedules attached, with the majority of fees remaining the same or lower as the current schedules. The City maintains two separate accounts with Wells Fargo – one for the City of Belmont and one for the Belmont-San Carlos Fire Department (BSCFD). As such, there are two separate fee schedules provided, even though the fees are the same between the two. The City acts as the administrator for BSCFD under the current amended Joint Powers Authority agreement with BSCFD, and the contract amendment under consideration will apply to both the City of Belmont and BSCFD. Wells Fargo's proposed monthly fee for banking services, based on the City's and

BSCFD's current volume of services, is approximately $1,200 and $400, respectively. Funding for BSCFD has already been incorporated as part of the biennial adopted FY 2024-25 and FY 2025-26 budgets, and funding for subsequent years of the agreement will be contingent on BSCFD Board appropriation.

Alternatives

1. Take no action.
2. Refer back to staff with alternative direction.

Attachments

A. Wells Fargo Bank 5-Year Fee Schedules – City of Belmont and Belmont-San Carlos Fire Department

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed:	Funding for the City of Belmont in the first year of the agreement is included in the adopted FY 2024-25 budget in the General Fund (Account #101-1-501-8363). Funding for each subsequent year of the agreement will be incorporated as part of the annual budget development process and will be contingent on Council appropriation.

Source:	**Purpose:**	**Public Outreach:**
Staff	Discretionary Action	Posting of Agenda

Treasury Management Proposal

5 Yr City of Belmont

Pricing as of April 2024

WF Code	AFP Code	Service Description	Charge Basis	Price	Monthly Volume	Activity Charges
		ACH Fraud Filter				
34333	251050	ACH FRAUD FILTER REVIEW MO BASE	Account	5.00000	1	5.00
34333	251050	ACH FRAUD FILTER REVIEW MO BASE	Account	10.00000	1	10.00
34335	251053	ACH FRAUD FILTER REVIEW - ITEM	Transaction filtered	10.00000	3	30.00
		ACH Origination				
34342	250400	ACH RETURN SUBSCRIPTION - ITEM	Item accessed	0.50000	8	4.00
34340	250400	ACH RETURN SUBSCRIPTION-ACCOUNT	ACH company ID	20.00000	2	40.00
34340	250400	ACH RETURN SUBSCRIPTION-ACCOUNT	ACH company ID	36.00000	1	36.00
ES283	250000	ACH VENDOR MONTHLY BASE	Company ID	50.00000	1	50.00
ES280	250000	ACH MONTHLY BASE	Company ID	50.00000	1	50.00
ES805	250000	ACH COID DELETE EXEMPT SURCHARGE	Company ID	50.00000	1	50.00
ES211	250102	ACH FUTURE DATED ITEM	Transaction	0.20000	261	52.20
06505	250302	ACH RETURN ADMIN -ELECTRONIC	Return	0.50000	2	1.00
ES801	250501	ACH TRANSMISSION CHARGE	Batch/file	5.00000	4	20.00
34330	250703	ACH SUBSCRIPTION - ACCOUNT	Account/company ID	40.00000	1	40.00
34332	250703	ACH SUBSCRIPTION - ITEM	Item accessed	0.20000	13	2.60
		ACH Receive				
ES349	250220	ACH RECEIVED ADDENDA	Addenda record	0.00000	69	0.00
ES344	250202	ACH RECEIVED ITEM	Transaction	0.10000	166	16.60
		Account Reconcilement				
34421	400272	ARP STMTS & RPTS (CSV/EXCEL) / ITEM	Transaction	0.03000	964	28.92
34420	400225	ARP STMTS & RPTS (CSV/EXCEL) BASE	Account	80.00000	1	80.00
34337	200201	ONLINE CHECK ISSUES-ITEM	Check issued	0.05000	117	5.85
12687	209999	ARP AGED ISSUE RECORDS ON FILE-ITEM	Record	0.00600	397	2.38
12604	200306	ARP OPTIONAL REPORTS	Report	5.00000	9	45.00
34350	200306	ONLINE ARP STMT & RPTS MONTHLY BASE	Account	5.00000	1	5.00
		Branch Services				
CK161	100006	CASH DEPOSITED IN WF BRANCH	Dollar	0.00600	1,538	9.23
08052	100006	BRANCH DEPOSIT	Deposit	6.00000	4	24.00
		Desktop Deposit Electronic Dep Serv				
12816	151352	DESKTOP DEPOSIT IMAGES RETRIEVED	Image	0.00000	97	0.00
15017	400058	DESKTOP DEPOSIT MONTHLY BASE	Account	20.00000	1	20.00
15003	400272	DESKTOP DEPOSIT REPORT PER ITEM	Item reported	0.00000	98	0.00
15007	010101	DESKTOP DEPOSIT-DEPOSIT CREDITED	Credit	1.00000	39	39.00
706	100224	DESKTOP DEPOSIT-DEPOSITED ITEM	Check deposited	0.10000	110	11.00
		Gen Acct Services Recoupment				
IAMTH	000230	RECOUPMENT MONTHLY	Deposit assessment	0.12750	1,058	134.90
		General Account Services				
22051	010000	ACCT MAINTENANCE	Account	15.00000	2	30.00

WF Code	AFP Code	Service Description	Charge Basis	Price	Monthly Volume	Activity Charges
CK021	010100	DEBITS POSTED	Debit	0.20000	97	19.40
CK018	250201	ELECTRONIC CREDITS POSTED	Credit	0.20000	157	31.40
		General Disbursement Services				
22225	150240	CHECK CASHING THRESHOLD MO BASE	Account	10.00000	1	10.00
22245	150240	CHECKS PAY TO INDIV BLOCK MO BASE	Account	10.00000	1	10.00
MD091	150240	PYMT AUTH MAX CHECK MTHLY BASE	Account	10.00000	1	10.00
22202	150100	DDA CHECKS PAID	Check paid	0.20000	93	18.60
		Incoming Wire Transfers				
ES030	350300	WIRE IN TO USA ACCT-USA DOMESTIC	Transfer	5.00000	5	25.00
		Information Reporting				
34123	40022Z	ALERTS SERVICE - EMAIL	Email	0.50000	76	38.00
34100	400052	PREV DAY BASE PER ACCT PER REPORT	Account	20.00000	2	40.00
34115	400425	PREV DAY REPORTING ITEMS LOADED	Item loaded	0.17000	345	58.65
		Positive Pay				
DS191	150122	PAYEE VALIDATION STANDARD-ITEM	Check paid	0.03500	93	3.26
12682	150120	POSITIVE PAY ONLY - ITEM	Check issued	0.08000	89	7.12
12681	150030	POSITIVE PAY ONLY MONTHLY BASE	Account	25.00000	1	25.00
		Returned Items				
CK064	100416	RETURN ITEM SERVICE MTHLY BASE	Customer ID	0.00000	4	0.00
		Wires Origination and Reporting				
ES139	350100	WIRE OUT DOMESTIC VANTAGE/API	Transfer	5.00000	4	20.00
34216	400832	WIRE TEMPLATE ONLINE	Occurrence	0.33000	22	7.26
		Zero Balance Account (ZBA)				
DS510	010020	ZERO BALANCE MASTER ACCOUNT MAINT	Account	20.00000	1	20.00
DS001	010021	ZERO BALANCE MONTHLY BASE	Account	5.00000	1	5.00
Total Monthly Activity Charges						**1,191.37**

Total Monthly Balance Based Charges (can be paid with balances)	1,191.37
Earnings Credit Rate @ 1.65%	
Estimated Earnings Credit	1,191.36

WELLS FARGO

Disclosures

We created this proposal for you based on our understanding of your requirements and the services in which you expressed interest. This proposal confirms the deposit and treasury management services and the pricing we plan to provide you based on certain assumptions including projected volumes and other relevant information you provided.

This document is confidential. Please do not share it without first obtaining our written permission. The services and pricing contained in this proposal are valid for 90 days. The pricing is subject to change if the actual volume or scope of services differs from the assumptions upon which we based the pricing.

Please let us know if you believe this proposal does not accurately represent the prices or services we discussed with you. If you have questions about the services in this proposal, please contact your Treasury Management *Sales Consultant or visit: www.wellsfargo.com/accountanalysis for additional information about the services.*

Regarding your services

Services with No Volumes

Services listed with zero volume are not included in the estimated monthly analysis fee but are included in the event the service is used in the future.



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Treasury Management Proposal

5 Yr BELMONT-SAN CARLOS FIRE DEPARTMENT

Pricing as of April 2024

WF Code	AFP Code	Service Description	Charge Basis	Price	Monthly Volume	Activity Charges
		ACH Fraud Filter				
34333	251050	ACH FRAUD FILTER REVIEW MO BASE	Account	5.00000	1	5.00
34333	251050	ACH FRAUD FILTER REVIEW MO BASE	Account	10.00000	1	10.00
		ACH Origination				
ES280	250000	ACH MONTHLY BASE	Company ID	50.00000	1	50.00
ES211	250102	ACH FUTURE DATED ITEM	Transaction	0.20000	35	7.00
06505	250302	ACH RETURN ADMIN -ELECTRONIC	Return	0.50000	2	1.00
ES801	250501	ACH TRANSMISSION CHARGE	Batch/file	5.00000	4	20.00
		ACH Receive				
ES349	250220	ACH RECEIVED ADDENDA	Addenda record	0.00000	6	0.00
ES344	250202	ACH RECEIVED ITEM	Transaction	0.10000	7	0.70
		Account Reconcilement				
34421	400272	ARP STMTS & RPTS (CSV/EXCEL) / ITEM	Transaction	0.03000	14	0.42
34420	400225	ARP STMTS & RPTS (CSV/EXCEL) BASE	Account	80.00000	1	80.00
12687	209999	ARP AGED ISSUE RECORDS ON FILE-ITEM	Record	0.00600	5	0.03
34350	200306	ONLINE ARP STMT & RPTS MONTHLY BASE	Account	5.00000	1	5.00
		Desktop Deposit Electronic Dep Serv				
15017	400058	DESKTOP DEPOSIT MONTHLY BASE	Account	25.00000	1	25.00
		Gen Acct Services Recoupment				
IAMTH	000230	RECOUPMENT MONTHLY	Deposit assessment	0.12750	37	4.72
		General Account Services				
22051	010000	ACCT MAINTENANCE	Account	15.00000	2	30.00
CK021	010100	DEBITS POSTED	Debit	0.20000	12	2.40
CK018	250201	ELECTRONIC CREDITS POSTED	Credit	0.20000	11	2.20
		General Disbursement Services				
22225	150240	CHECK CASHING THRESHOLD MO BASE	Account	10.00000	1	10.00
22245	150240	CHECKS PAY TO INDIV BLOCK MO BASE	Account	10.00000	1	10.00
MD091	150240	PYMT AUTH MAX CHECK MTHLY BASE	Account	10.00000	1	10.00
		Image Delivery				
27707	40034Z	ONLINE SEARCH	Inquiry	0.99000	2	1.98
		Incoming Wire Transfers				
ES030	350300	WIRE IN TO USA ACCT-USA DOMESTIC	Transfer	5.00000	2	10.00
		Information Reporting				
34123	40022Z	ALERTS SERVICE - EMAIL	Email	0.50000	21	10.50
34100	400052	PREV DAY BASE PER ACCT PER REPORT	Account	20.00000	1	20.00

WF Code	AFP Code	Service Description	Charge Basis	Price	Monthly Volume	Activity Charges
34115	400425	PREV DAY REPORTING ITEMS LOADED	Item loaded	0.17000	12	2.04
		Positive Pay				
12681	150030	POSITIVE PAY ONLY MONTHLY BASE	Account	25.00000	1	25.00
		Wires Origination and Reporting				
ES139	350100	WIRE OUT DOMESTIC VANTAGE/API	Transfer	5.00000	1	5.00
		Zero Balance Account (ZBA)				
DS510	010020	ZERO BALANCE MASTER ACCOUNT MAINT	Account	20.00000	1	20.00
DS001	010021	ZERO BALANCE MONTHLY BASE	Account	5.00000	1	5.00
Total Monthly Activity Charges						**372.99**

Total Monthly Balance Based Charges (can be paid with balances)	372.99
Earnings Credit Rate @ 1.65%	
Estimated Earnings Credit	49.19

Disclosures

We created this proposal for you based on our understanding of your requirements and the services in which you expressed interest. This proposal confirms the deposit and treasury management services and the pricing we plan to provide you based on certain assumptions including projected volumes and other relevant information you provided.

This document is confidential. Please do not share it without first obtaining our written permission. The services and pricing contained in this proposal are valid for 90 days. The pricing is subject to change if the actual volume or scope of services differs from the assumptions upon which we based the pricing.

Please let us know if you believe this proposal does not accurately represent the prices or services we discussed with you. If you have questions about the services in this proposal, please contact your Treasury Management *Sales Consultant or visit: www.wellsfargo.com/accountanalysis for additional information about the services.*

Regarding your services

Services with No Volumes

Services listed with zero volume are not included in the estimated monthly analysis fee but are included in the event the service is used in the future.



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STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Elizabeth Wada, Public Works, (650) 595-7468, ewada@belmont.gov Tracy Scramaglia, Public Works, (650) 595-7469, tscramaglia@belmont.gov
Agenda Title:	0 Longfellow Drive Permanent Encroachment Agreement
Agenda Action:	Resolution

Recommendation

Adopt a resolution approving a Permanent Encroachment Agreement for a retaining wall within the public right-of-way at 0 Longfellow Drive (APN 043-222-350).

Strategic Focus Area

Infrastructure and Mobility

Background

In June 2021, the City approved planning entitlement for a new single-family residence at 0 Longfellow Drive (APN 043-222-350), and is currently undergoing Building Permit review. The project proposes the installation a concrete retaining wall along the subject property's proposed driveway, which encroaches into the public right-of-way.

The Belmont City Code (BCC) gives the City Council the sole authority to issue permits for permanent or unusual encroachments that include above ground structures such as retaining walls, fences, poles, and awnings. This class of encroachment is commonly known as "permanent encroachment," although the City retains the right to revoke the permit and require removal if the structure is not being used or if it interferes with planned public improvements. BCC Section 22-6(b) requires the Director of Public Works to review all permanent encroachment applications. If the Director finds the application is in compliance with the Municipal Code, the Director will recommend approval with conditions necessary to protect the health and safety of the public and the City. The City Council may choose to approve or to conditionally approve the application.

Analysis

The applicant for 0 Longfellow Drive (APN 043-222-350) has submitted a Permanent Encroachment Permit Application to allow encroachment into the public right-of-way as indicated in Exhibit A, attached. Staff has reviewed the application and found it in compliance with the City Code. The City Council may choose to approve or to conditionally approve the request only if it considers that there is some public benefit for the encroachment. BCC Section 22-6(e)(1) provides examples of acceptable public benefits, such as added off-street parking, sidewalk or safer sight distance, reduced amount of grading onsite, and replacement or improvement of an existing undesirable physical condition or provide other neighborhood betterment.

The proposed encroachment provides a public benefit by preserving majority of the steep hillside's natural grade, thus minimizing the amount of grading onsite required for a new home on the subject property. In accordance with BCC Section 22-6(d), notices were sent to all affected properties within 300 feet of the project location that the City Council would be considering the item.

Alternatives

1. Take no action.
2. Refer back to staff for more information.

Attachments

A. Resolution
B. Exhibit A – Site showing location and details of the proposed retaining wall

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed: Applicant has paid the applicable permit fee accounted for in the Development Services Fund.

Source:	**Purpose:**	**Public Outreach:**
Staff	Statutory/Contractual Requirement	Other*

*Notices were sent to affected properties within 300 feet of the project location.

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT APPROVING A PERMANENT ENCROACHMENT AGREEMENT FOR A RETAINING WALL WITHIN THE PUBLIC RIGHT-OF-WAY AT 0 LONGFELLOW DRIVE (APN 043-222-350).

WHEREAS, the City of Belmont is authorized by Belmont City Code (BCC) Section 22-6 to issue encroachment permits for construction of structures in the public right-of-way; and,

WHEREAS, the applicant of 0 Longfellow Drive (APN 043-222-350) has submitted a Permanent Encroachment Permit Application for a Permanent Encroachment Agreement to allow encroachment into the public right-of-way as indicated in Exhibit A; and,

WHEREAS, the Public Works Director reviewed the application and determined that the application is in accordance with the requirements of BCC Section 22-6(e); and,

WHEREAS, the encroaching structure in connection with this agreement will be constructed in accordance with City standards at the location as shown in Exhibit A.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. In accordance with BCC Section 22-6(e), the City Council finds:

(a) There is a public benefit to the encroachments as the encroachment preserve a majority of the steep hillside's natural grade, thus minimizing the amount of grading onsite required for a new home; and,

(b) The encroachment will not unduly restrict the public right of way or public water course for other typical uses; and,

(c) The City will be duly protected from liability for injury to persons and property; and,

(d) The required bonds will guarantee the faithful performance of all conditions and requirements specified in the encroachment agreement.

(e) The encroachment is not solely for increasing the usable area of a private residence or business without a public benefit.

SECTION 2. The City Council authorizes the City Manager to execute the Permanent Encroachment Agreement on behalf of the City of Belmont.

SECTION 3. The City Council authorizes the City Clerk to file the Agreement with the County Recorder.

SECTION 4. The Permanent Encroachment Permit is approved subject to following

conditions of approval which must be strictly complied with:

(a) The encroached structure shall be constructed according to the approved plans unless otherwise approved by the Director of Public Works and will be included as part of the project; and,

(b) The property owners shall be responsible and bear all costs to maintain the encroachment and necessary to remove the encroachment in the event as determined by the Director of Public Works; and,

(c) The property owners shall be responsible for any restoration required as a consequence of work authorized by the City of Belmont within the public right-of-way.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:

Absent:

Abstain:

ATTEST:

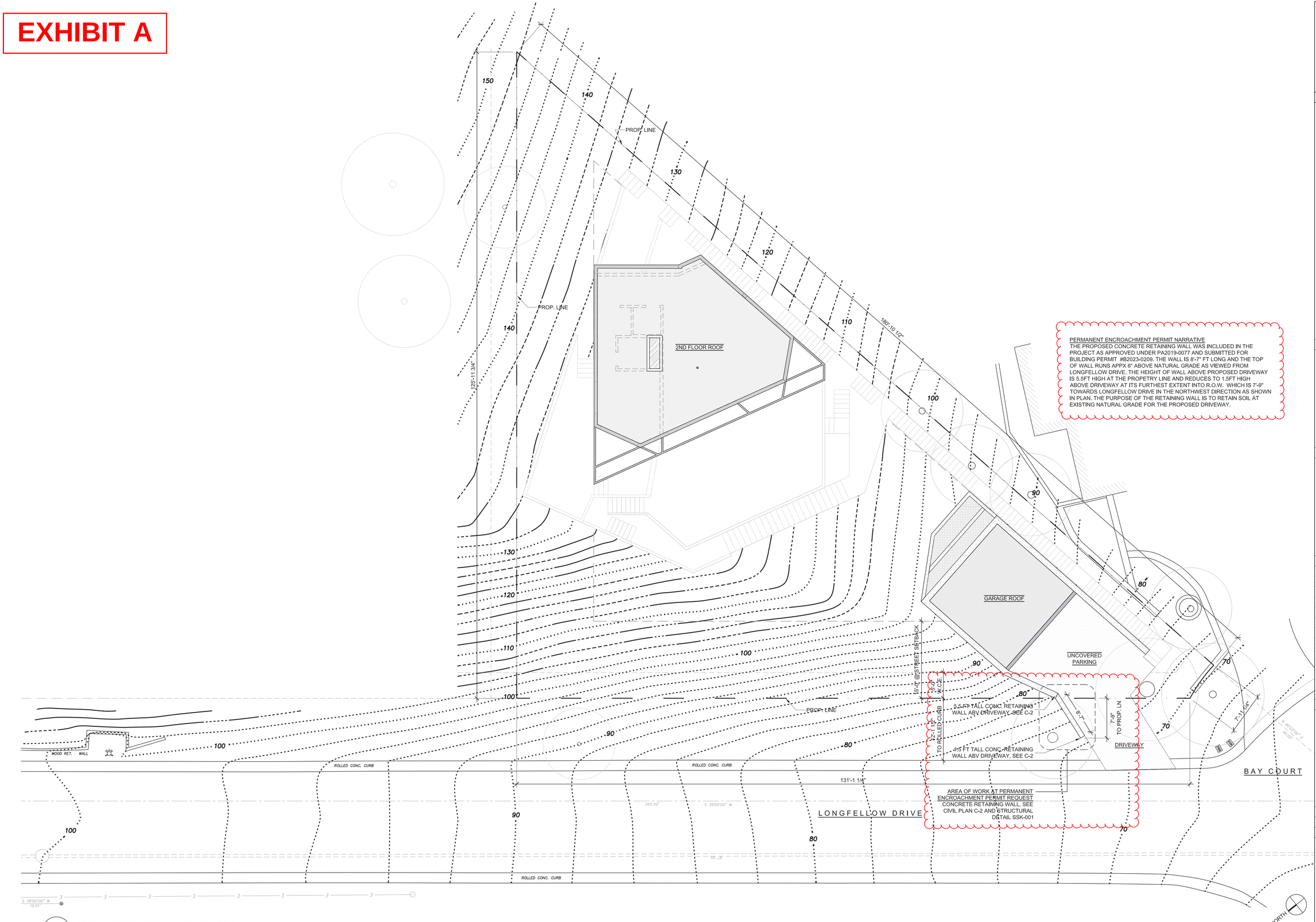
_____
City Clerk

_____
Mayor

APPROVED AS TO FORM:

_____
City Attorney

EXHIBIT A



1 A1.10 PERMANENT ENCROACHMENT PLOT PLAN
1/8" = 1'

PERMANENT ENCROACHMENT PERMIT NARRATIVE
THE PROPOSED CONCRETE RETAINING WALL WAS INCLUDED IN THE PROJECT AS APPROVED UNDER PA2019-0077 AND SUBMITTED FOR BUILDING PERMIT #B2023-0209. THE WALL IS 8'-7" FT LONG AND THE TOP OF WALL RUNS APPX 6" ABOVE NATURAL GRADE AS VIEWED FROM LONGFELLOW DRIVE. THE HEIGHT OF WALL ABOVE PROPOSED DRIVEWAY IS 5.5FT HIGH AT THE PROPETRY LINE AND REDUCES TO 1.5FT HIGH ABOVE DRIVEWAY AT ITS FURTHEST EXTENT INTO R.O.W. WHICH IS 7'-9" TOWARDS LONGFELLOW DRIVE IN THE NORTHWEST DIRECTION AS SHOWN IN PLAN. THE PURPOSE OF THE RETAINING WALL IS TO RETAIN SOIL AT EXISTING NATURAL GRADE FOR THE PROPOSED DRIVEWAY.

BENVENISTE ARCHITECTS
242 Cabrillo Street San Francisco CA 94118
415.378.5936 joseph@bao-design.com

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LICENSED ARCHITECT
JOSEPH L BENVENISTE
No. C37919
REN. 4-30-25
STATE OF CALIFORNIA

PROJECT NAME

KORENBLUM RES.
LONGFELLOW DRIVE
BELMONT, CA
94002

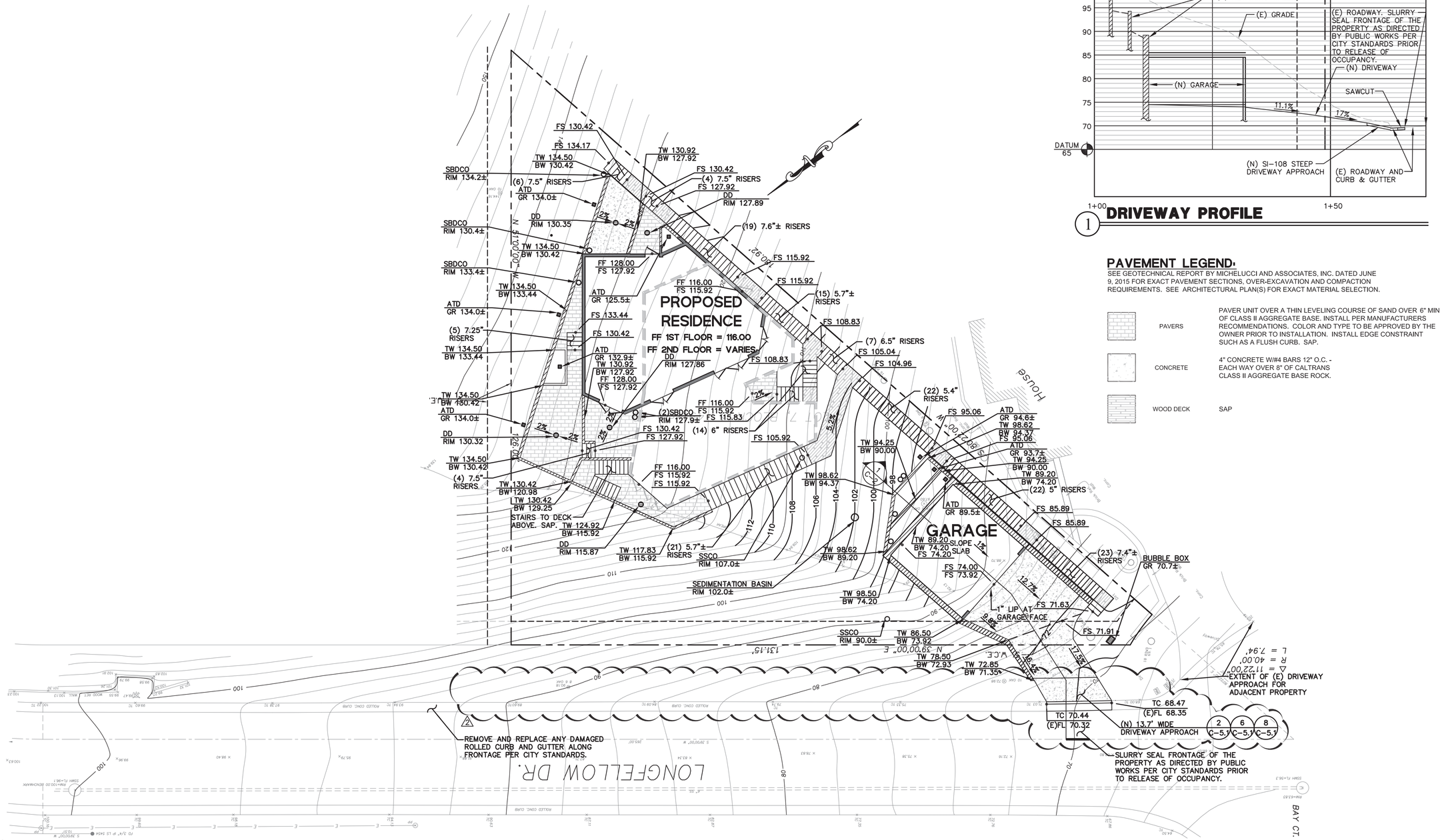
ISSUED	DESCRIPTION
06.08.23	BLDG PERMIT
06.04.24	BLDG PERMIT REV1 1
07.10.24	BLDG PERMIT REV2 2
07.24.24	ENCROACHMENT PLAN
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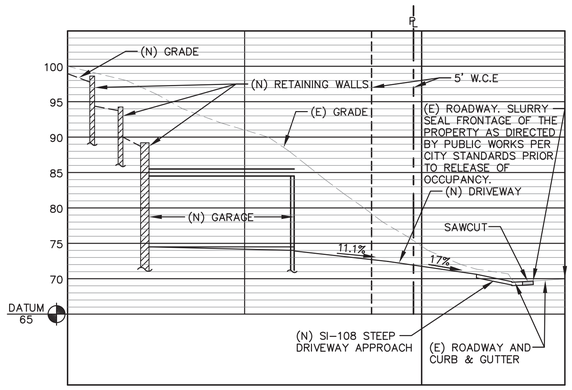
SHEET TITLE

PERMANENT ENCROACHMENT PLOT PLAN

FILE
BY J BENVENISTE
SCALE 1/8" = 1'
SHEET

A1.10





1 **DRIVEWAY PROFILE**

PAVEMENT LEGEND:

SEE GEOTECHNICAL REPORT BY MICHELUCCI AND ASSOCIATES, INC. DATED JUNE 9, 2015 FOR EXACT PAVEMENT SECTIONS, OVER-EXCAVATION AND COMPACTION REQUIREMENTS. SEE ARCHITECTURAL PLAN(S) FOR EXACT MATERIAL SELECTION.

	PAVERS	PAVER UNIT OVER A THIN LEVELING COURSE OF SAND OVER 6" MIN OF CLASS II AGGREGATE BASE. INSTALL PER MANUFACTURERS RECOMMENDATIONS. COLOR AND TYPE TO BE APPROVED BY THE OWNER PRIOR TO INSTALLATION. INSTALL EDGE CONSTRAINT SUCH AS A FLUSH CURB. SAP.
	CONCRETE	4" CONCRETE W/#4 BARS 12" O.C. - EACH WAY OVER 8" OF CALTRANS CLASS II AGGREGATE BASE ROCK.
	WOOD DECK	SAP

SEE SHEET C-0 FOR LEGEND AND SHEET C-1 FOR NOTES

1-800-227-2600 CALL BEFORE YOU DIG UNDERGROUND SERVICE ALERT

0 10 20
GRAPHIC SCALE

PRECISION ENGINEERING AND CONSTRUCTION, INC.
901 Waltermire Street
Belmont, CA 94002
T: 650.226.8640
F: 650.637.0135
Travis@precision-ec.com

REVISIONS:	DATE:
1 TOWN COMMENTS	06/11/2024
2 TOWN COMMENTS	07/10/2024

REGISTERED PROFESSIONAL ENGINEER
TRAVIS R. LUTTER
73638
CIVIL
STATE OF CALIFORNIA

GRADING PLAN
NEW RESIDENCE
LONGFELLOW DRIVE
BELMONT, CA 94002

Date: 03/15/2023
Scale: 1" = 10'
Design: AJP
Check: TRL
Drawing Number: C-2
PEC Job No. PEC 15-166

DRAWING NAME: C:\Users\d drive\PEC Project Files\2015\PEC 15-166 - Longfellow Drive, Belmont\Dwg\PEC 15-166 SHEETS.dwg
PLOTTED BY: Michael

NOTES:

1. FOOTING TO BE FOUNDED INTO WEATHERED ROCK IN ACCORDANCE WITH GEOTECNICAL REPORT RECOMMENDATIONS.

2. DRAIN SYSTEM: CONSIST OF OPEN GRADED GRAVEL ENCASED IN A FILTER FABRIC SUCH AS MIRAFI 140N OR USE CLASS 2 PERMEABLE MATERIAL NOT ENCASED IN FILTER FABRIC.

3. RETAINING WALL AND FOUNDATION GEOTECHNICAL DESIGN CRITERIA: (FOR ADDITIONAL CRITERIA SEE SHEET SH1.1)
   a. STRENGTH F'C = 2500 PSI AT 28 DAYS
   b. ALLOWABLE SOIL BEARING PRESSURE: DEAD + LIVE: 3,000 PSF
   c. COEFFICIENT OF FRICTION: 0.40
   d. PASSIVE PRESSURE: 400 PCF
   e. EQUIVALENT FLUID PRESSURE: 35 PCF (LEVEL BACK)
      50 PCF (SLOPING BACK)
   f. SKIN FRICTION: 0 PSF
   g. LATERAL LOADING: $12H^2$ PLF (APPLIED AT 0.33xH ABOVE THE BASE OF FOOTING)
   h. SURCHARGE LOADING: 0 PSF

RETAINING WALL SCHEDULE

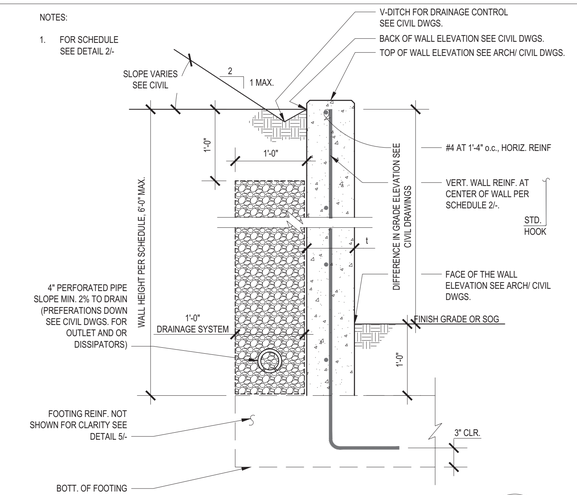
MAX. WALL HEIGHT	WALL THICKNESS, t	WALL		FOOTING				KEY	
		VERT. WALL REINF. F.S.	VERT. WALL REINF. N.S.	FOOTING DEPTH	FOOTING WIDTH	TOP TRANS. REINF.	BOTTOM TRANS. REINF.	DEPTH	REINF.
5'-6"	0'-8"	#5 AT 12" AT CENTER OF WALL	#5 AT 12" AT CENTER OF WALL	2'-0"	5'-6"	#5 AT 12"	#5 AT 12"	1'-0"	#5 AT 12"

AMERICAN SUBSURFACE ENGINEERING, INC.
1300-B Old Bayshore Highway
San Jose, CA 95070
TEL: 650.302.0542
www.ASEsoil.com

REGISTERED PROFESSIONAL ENGINEER
BRYAN G. CORTNIK
S 5136
STRUCTURAL
STATE OF CALIFORNIA

PROJECT:	KORENBLUM RESIDENCE LONGFELLOW DRIVE, BELMONT, CA 94002
PROJECT NO:	21034
TITLE:	RETAINING WALL
DATE:	05/14/2024
SCALE:	1"=1'-0"
BY:	BGC
REF. SHEET:	2/SH2.2, 5/SH2.2, & 6/SH2.2
ISSUES/REV.	-
SKETCH NO.	SSK-001

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CONCRETE RETAINING WALL CUT TYPE

NO SCALE

6

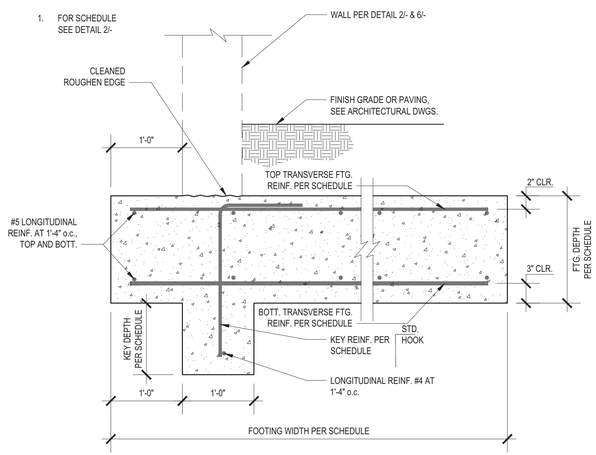
NOTES:

1. FOOTING TO BE FOUNDED INTO WEATHERED ROCK IN ACCORDANCE WITH GEOTECNICAL REPORT RECOMMENDATIONS.
2. DRAIN SYSTEM: CONSIST OF OPEN GRADED GRAVEL ENCASED IN A FILTER FABRIC SUCH AS MIRAFI 140N OR USE CLASS 2 PERMEABLE MATERIAL NOT ENCASED IN FILTER FABRIC.
3. RETAINING WALL AND FOUNDATION GEOTECHNICAL DESIGN CRITERIA: (FOR ADDITIONAL CRITERIA SEE SHEET SH1.1)
   a. STRENGTH F'C = 2500 PSI AT 28 DAYS
   b. ALLOWABLE SOIL BEARING PRESSURE: DEAD + LIVE: 3,000 PSF
   c. COEFFICIENT OF FRICTION: 0.40
   d. PASSIVE PRESSURE: 400 PCF
   e. EQUIVALENT FLUID PRESSURE: 35 PCF (LEVEL BACK)
   f. SKIN FRICTION: 0 PSF
   g. LATERAL LOADING: $12H^2$ PLF (APPLIED AT 0.33xH ABOVE THE BASE OF FOOTING)
   h. SURCHARGE LOADING: 0 PSF

RETAINING WALL SCHEDULE									
MAX. WALL HEIGHT	WALL THICKNESS, t	WALL		FOOTING				KEY	
		VERT. WALL REINF. F.S.	VERT. WALL REINF. N.S.	FOOTING DEPTH	FOOTING WIDTH	TOP TRANS. REINF.	BOTTOM TRANS. REINF.	DEPTH	REINF.
6'-0"	0'-8"	#5 AT 16" AT CENTER OF WALL	#5 AT 16" AT CENTER OF WALL	2'-0"	5'-6"	#5 AT 16"	#5 AT 16"	-	-

NOTES:

1. FOR SCHEDULE SEE DETAIL 2/-



SPREAD FOOTIN(S) REATINING WALL CUT TYPE

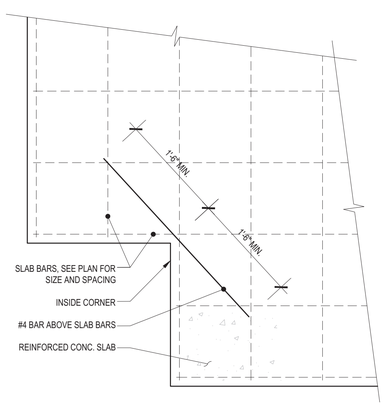
NO SCALE

5

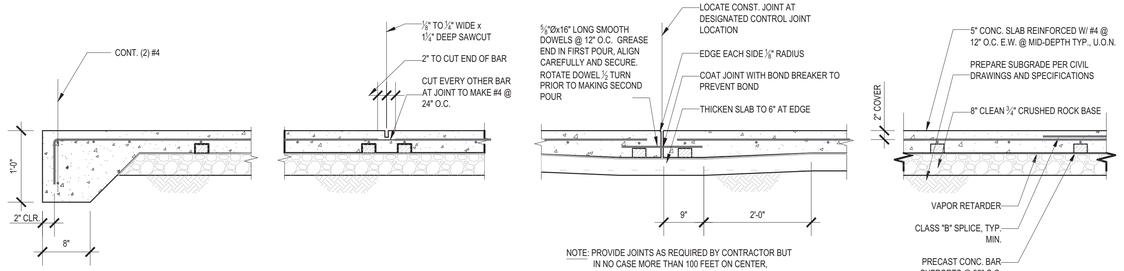
CANTILEVERED RETAINING WALL SCHEDULE

NO SCALE

2



PARTIAL PLAN VIEW - SLAB BARS @ INSIDE CORNER



SLAB EDGE

SAWCUT JOINT (S.J.)

NOTE: PROVIDE JOINTS AS REQUIRED BY CONTRACTOR BUT IN NO CASE MORE THAN 100 FEET ON CENTER, U.O.N. ON PLANS

CONSTRUCTION JOINT (C.J.)

TYPICAL SECTION

TYPICAL SLAB-ON-GRADE DETAILS

NO SCALE

1

■ STRUCTURAL ENGINEER

AMERICAN SUBSURFACE ENGINEERING, INC.

1300-B Old Bayshore Highway
San Jose, CA 95070
TEL: 650.302.0542
www.ASEsoil.com

■ STAMP

REGISTERED PROFESSIONAL ENGINEER
BRIAN G. CORTINA
No. 5136
STRUCTURAL
STATE OF CALIFORNIA

■ PROJECT NAME / LOCATION

KORENBLUM RESIDENCE

LONGFELLOW DRIVE
BELMONT, CA 94002

TEMPORARY SHORING

■ ISSUE / REVISION

No.	DESCRIPTION	DATE
	PERMIT DRAWINGS	MM/DD/YYY

■ SCALE	AS NOTED IF PRINT SIZE IS 24"x36"
■ S.E.R.	BGC
■ DESIGN	BGC
■ DRAWN	BGC
■ PROJECT No.	21034

■ DRAWING TITLE

TYPICAL CONCRETE DETAILS

■

SH2.2

All drawings and written material appearing herein constitute the original and unpublished work of the American Subsurface Engineering and the same may not be duplicated, used or disclosed without the written consent of the American Subsurface Engineering.

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Tracy Scramaglia, Assistant Public Works Director/City Engineer (650) 595-7469, tscramaglia@belmont.gov
Agenda Title:	Demolition of City-Owned Properties Project, City Contract Number (CCN) 2023-626, Notice of Completion
Agenda Action:	Resolution

Recommendation

Adopt a resolution accepting work and authorizing the issuance of a Notice of Completion for the Demolition of City-Owned Properties Project, City Contract Number 2023-626, for a final contract cost of $106,390.

Strategic Focus Area

Economic Development and Housing

Background

On February 14, 2023, the City Council authorized advertisement for sealed bids approving award of City Contract Number 2023-626, Demolition of City-Owned Properties located at El Camino Real at Hill Street (APNs 045-163-070, 045-162-070, 045-162-080, 045-162-090), to the lowest bidder for an amount not to exceed $85,000.

On April 19, 2023, the City received four bids, all of which exceeded the engineer's estimate and the authorized contract amount.

On May 9, 2023, the City Council approved awarding the construction contract to Selway Construction, Inc. for $106,390 with a construction contingency of $15,958.50 for a total amount not to exceed $122,348.50.

Analysis

Project construction commenced and was completed in March 2024 to the satisfaction of the City. The total cost of construction is $106,390, which is within the approved construction contract amount. There were no change orders and no additional costs out of the construction contingency budget.

If there are no claims filed within 35 days of recording the Notice of Completion, any final payment due will be released to the Contractor.

Alternatives

1. Take No Action
2. Refer back to staff for further information

Attachments
A. Resolution

Fiscal Impact
☐ No Fiscal Impact

☒ Funding Source Confirmed: Project cost of $106,390 was expended from the Affordable Housing Fund (Account 275-5-902-8351).

Source:	**Purpose:**	**Public Outreach:**
Staff	Statutory/Contractual Requirement	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT ACCEPTING WORK AND AUTHORIZING THE ISSUANCE OF A NOTICE OF COMPLETION FOR THE DEMOLITION OF CITY-OWNED PROPERTIES PROJECT, CITY CONTRACT NUMBER 2023-626, FOR A FINAL CONTRACT COST OF $106,390.

WHEREAS, On February 14, 2023, Council authorized advertisement for sealed bids approving award of City Contract Number 2023-626, Demolition of City-Owned Properties located at El Camino Real at Hill Street (APN's 045-163-070, 045-162-070, 045-162-080, 045-162-090), to the lowest bidder for an amount not to exceed $85,000; and,

WHEREAS, the project is funded through City's Affordable Housing Fund Account 275-5-902-8351; and,

WHEREAS, the City received four bids that were opened on April 19, 2023. All four bids exceeded the engineer's estimate and the authorized contract amount; and,

WHEREAS, on May 9, 2023, the City Council approved awarding the construction contract to Selway Construction, Inc. for $106,390 with a construction contingency of $15,958.50 for a total amount not to exceed $122,348.50, and authorized the City Manager to execute a contract for the demolition of City-owned properties located at El Camino Real at Hill Street (APN's 045-163-070, 045-162-070, 045-162-080, 045-162-090), City Contract Number 2023-626

WHEREAS, the construction was completed in March 2024, within the construction contract not to exceed amount; and,

WHEREAS, the final project cost is $106,390.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. Accepts the work as complete.

SECTION 2. Authorizes the City Clerk to issue the Notice of Completion to Selway Construction, Inc.

SECTION 3. Authorizes the City Clerk to file Notice of Completion with the San Mateo County Clerk-Record's office for the Demolition of City-Owned Properties Project, CCN 2024-626.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:
Absent:
Abstain:

ATTEST:

City Clerk

Mayor

APPROVED AS TO FORM:

City Attorney

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Josh Sun, Public Works, (650) 595-7468, jsun@belmont.gov
Agenda Title:	Appropriation of Street Improvement Fund (Measure A) and Amendment 2 to the Architectural and Engineering Services Agreement with Kimley Horn for the Ralston Avenue Adaptive Signal Control Technology System Project
Agenda Action:	Resolution

Recommendation

Adopt a resolution appropriating $28,990 of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project and authorizing the City Manager to execute Amendment 2 to the agreement with Kimley-Horn and Associates, Inc. (Kimley-Horn) for additional services to prepare updated background signal coordination plans for the traffic signals on Ralston Avenue between 6th Avenue and the US-101 SB Ramps for an amount not to exceed $28,990, bringing the total agreement to a not to exceed amount of $301,770.

Strategic Focus Area

Infrastructure and Mobility

Background

On January 26, 2022, the City entered into an Architectural and Engineering Services Agreement with Kimley-Horn for the design and implementation of the Ralston Avenue Adaptive Signal Control Technology (ASCT) System Project in the amount of $255,500. The services included the design for adaptive signal control timing at 12 signal-controlled intersections along Ralston Avenue, from Christian Drive to Hiller Avenue, as well as design of the relocation of two electrical cabinets (at the intersections of Ralston Avenue and Belmont Canyon Road and Ralston Avenue and Cipriani Boulevard) to provide safer access to the cabinets by operations and maintenance staff. Kimley-Horn developed plans, specifications, and an engineer's estimate (PS&E) for the Ralston Avenue Adaptive Signal Control project, including for the relocation of the cabinets and conduit and reinstallation and reconnection of existing video detection and fiber equipment into the new cabinet at the intersections of Ralston Avenue and Belmont Canyon Road and Ralston Avenue and Cipriani Boulevard. The Ralston Ave ASCT Project was funded by the Transportation Fund for Clean Air (TFCA) through an agreement with C/CAG and the City.

On March 28, 2023, the City awarded a construction contract to Bear Electrical Solutions Inc. to relocate the two cabinets. Additional traffic engineering and construction support services, PG&E coordination, and construction assistance was required to support the construction. On August 24, 2023, Kimley-Horn submitted a proposal to provide the services for an additional amount of $17,280. On October 18, 2023, the City approved Amendment 1 to the Architectural and Engineering Services Agreement with Kimley-Horn bringing the total agreement to a not to exceed amount of $272,780.

The traffic signals on Ralston Avenue between 6th Avenue and the US-101 SB Ramps operate with the Kadence Adaptive system. The adaptive system uses the base signal coordination plans as the starting point for the adaptive operations. The city recently updated the signal phasing at the intersection of Ralston Avenue and Old County Road, modifying the phasing from 6-phase operation to 8-phase operation, which has impacted traffic operations in the area. Therefore, the City requires Kimley-Horn to collect new traffic data and to update the background coordination plans to address operational issues that have come up since the installation of the new phasing. On August 21, 2024, Kimley-Horn submitted a proposal for these additional services for an amount not to exceed $28,990. Staff reviewed the proposal and finds the scope of services and fee acceptable. This proposal will be included in Amendment 2 to the Architectural and Engineering Services Agreement with Kimley-Horn for the design and implementation of the Ralston Avenue Adaptive Signal Control Technology (ASCT) System Project.

Analysis

The additional services include developing and implementing new traffic signal coordination plans during the weekday AM, Midday, Afternoon School, and PM peak periods at five (5) intersections on Ralston Avenue between 6th Avenue and the US-101 SB Ramps. In addition, coordination plans will be adjusted at the other seven (7) traffic signals on Ralston Avenue and El Camino Real that are currently part of the same adaptive group. The detailed scope of services is included with the Kimley-Horn proposal in Attachment B.

The proposed budget for the additional scope of services is for a not to exceed amount of $28,990. Upon authorization of Amendment 2, the total agreement amount, including the original scope of services will be $301,770. The current remaining budget in Ralston Avenue Adaptive Signal Control Technology System Project is for annual maintenance of the adaptive system along Ralston Avenue. An appropriation of $28,990 of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project (Account No. 399-3-730-3230-9030) is required to fund the additional services of Amendment 2.

Alternatives

1. Take no action.
2. Refer back to staff for more information.

Attachments

A. Resolution
B. Kimley-Horn Proposal

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed:	Budget appropriation of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project (Account No. 399-3-730-3230-9030).

Source:	**Purpose:**	**Public Outreach:**
Staff	Discretionary Action	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT APPROPRIATING $28,990 OF STREET IMPROVEMENT (MEASURE A) FUNDS TO THE RALSTON AVENUE ADAPTIVE SIGNAL CONTROL TECHNOLOGY SYSTEM PROJECT AND AUTHORIZING THE CITY MANAGER TO EXECUTE AMENDMENT 2 TO THE AGREEMENT WITH KIMLEY-HORN AND ASSOCIATES, INC. FOR ADDITIONAL SERVICES TO PREPARE UPDATED BACKGROUND SIGNAL COORDINATION PLANS FOR THE TRAFFIC SIGNALS ON RALSTON AVENUE BETWEEN 6TH AVENUE AND THE US-101 SB RAMPS FOR AN AMOUNT NOT TO EXCEED $28,990, BRINGING THE TOTAL AGREEMENT TO A NOT TO EXCEED AMOUNT OF $301,770.

WHEREAS, on January 26, 2022, the City entered into an Architectural and Engineering Services Agreement with Kimley-Horn and Associates, Inc. (Kimley-Horn), for the Ralston Avenue Adaptive Signal Control Technology (ASCT) System Project in the amount of $255,500; and,

WHEREAS, on October 18, 2023, the City approved Amendment 1 to the Architectural and Engineering Services Agreement with Kimley-Horn to include additional services for the relocation of two electrical cabinets for an additional amount of $17,280, bringing total contract cost to a not-to-exceed amount of $272,780; and,

WHEREAS, the City requires traffic engineering support services to prepare updated background signal coordination plans for the traffic signals on Ralston Avenue between 6th Avenue and the US-101 SB Ramps; and,

WHEREAS, on August 21, 2024, Kimley-Horn provided a proposal for the additional service for an amount not to exceed $28,990; and,

WHEREAS, budget appropriation of $28,990 of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project (Account No. 399-3-730-3230-9030) is required for the cost of the additional services from Kinley-Horn, to be included as part of Amendment 2.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. Appropriate $28,990 of Street Improvement Fund (Measure A) funds to the Ralston Avenue Adaptive Signal Control Technology System Project.

SECTION 2. Authorize the City Manager to negotiate and execute Amendment 2 to the agreement with Kimley-Horn for additional services to prepare updated background signal coordination plans for the traffic signals on Ralston Avenue between 6th Avenue and the US-101 SB Ramps for an amount not to exceed $28,990, bringing the total agreement to a not to exceed amount of $301,770.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:

Absent:

Abstain:

ATTEST:

City Clerk

Mayor

APPROVED AS TO FORM:

City Attorney

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Brigitte Shearer, Parks and Recreation Director, (650) 595-7488, bshearer@belmont.gov
Agenda Title:	Belmont Library Exterior Improvement CCN 2024-632
Agenda Action:	Motion

Recommendation

Adopt a motion authorizing the City Manager to negotiate and execute a contract with Staples Construction Company for $123,594.51 plus a 15% contingency (total $142,133.69) for the painting of the exterior of the Belmont Library, City Contract Number 2024-632.

Strategic Focus Area

Infrastructure and Mobility

Background

The Belmont Library was rebuilt and opened in April 2006. The 20,000 square foot project was built with funds secured through a partnership between San Mateo County Libraries (SMCL) and the City of Belmont with substantial support from local businesses and non-profits including the Friends of the Belmont Library, the Taube Foundation, the Belmont Rotary Club, and Oracle. The project resulted in a beautiful facility that is a true asset to the community. The building and three-acre land parcel are owned and maintained by the City of Belmont and library operations managed by SMCL.

The Belmont Library is one of the most popular libraries in the SMCL network. Its diverse portfolio of services and proximity to Belmont schools makes it a popular destination. The library is open 61 hours per week and has between 17,000 and 20,000 visitors per month.

Currently, there is $500,000 budgeted for the Belmont Library's interior and exterior painting as well as a flooring replacement under project# 8087 in the Capital Improvement Program (CIP) Fund, with funding coming from the Library Maintenance and Operation Fund.

Analysis

The Belmont Library was built 18 years ago and has operated efficiently since then. To date, minor improvements to the lighting system, installation of an automated book sorting machine, and small repairs due to normal wear and tear have been completed. Now, the building's age, consistent heavy foot traffic, and its ongoing adaptation to meet the changing needs of the community necessitate more extensive improvements to its interior and exterior. The existing carpeting is failing in multiple locations, the perimeter and staff work area walls need repainting, acoustical panels need replacing, and the exterior walls need refreshing.

San Mateo County Libraries (SMCL) has engaged Noll & Tam Architects to develop a new flooring layout and interior and exterior color schemes. New paint and flooring will give the already beautiful Belmont Library a refreshed, modern look while preserving its charm. The carpet, inspired by the texture of bark, connects the space to its local natural surroundings. Together with updated paint and acoustical wallcoverings and, upon completion of the painting and flooring, new furnishings, these changes will make the Library feel new and inviting, enhancing its appeal for visitors. The interior paint and flooring improvement proposal is expected soon. To allow contractors to work as efficiently as possible, the interior work will require the closure of the Library for several weeks. The exterior painting may occur earlier this fall, weather and contract processing-permitting.

As the owner of the building, the City is responsible for executing these building improvements. SMCL will manage the temporary relocation of its collection, shelving, and equipment, and will install new furnishings upon project completion.

Procurement

The City of Belmont, a member (member ID #94356) of the Sourcewell service cooperative (formerly National Joint Powers Alliance (NJPA)), has successfully utilized Sourcewell's cooperative purchase contracts in the past.

For this project, staff collaborated with Gordian, a Sourcewell-approved project management and contractor sourcing company. Gordian then identified Staples Construction Company as a Sourcewell-approved contractor. In response to Sourcewell's Invitation for Bid # CA-101723 on October 17, 2023. Staples submitted a proposal for general building and construction services. Following Sourcewell's responsive bid review and evaluation process, as one of the lowest responsive and responsible bidder Staples Construction Company now holds a multiyear contract through the Sourcewell General Services Cooperative Purchasing Agreement (Contract Number CA-R4-GB-101723-STA), providing general building and construction services to Sourcewell/NJPA members across California. Selecting a contractor with an active Sourcewell contract aligns with the City of Belmont's procurement policies, allowing for the procurement of construction services in the open market as an approved alternative to competitive bidding.

Several site visits and meetings were conducted with City and SMCL staff, Staples Construction Company and Gordian to develop and refine the scope of work for exterior improvements (Attachment C). Following this, Staples Construction Company submitted a proposal which was reviewed by City staff. Staff determined that the proposed add alternate to paint the mechanical pit is not needed. Pending City Council approval, work would be scheduled to begin in the fall of 2024 and is expected to be completed by the end of the year, weather permitting.

Estimated cost for this project:

	CCN-2024-632 – Library Exterior
Staples Construction Company	$131,148.58
Less: Add Alternate	$7,554.07
Subtotal	$123,594.51
15% Contingency	$18,539.18
Total	$142,133.69

There are adequate funds available in the FY 2024-2025 CIP Fund for project 8087 to complete the project.

Approval of the motion will authorize the negotiation and execution of contracts with Staples Construction Services for painting the exterior of the Belmont Library for a total amount not to exceed of $142,133.69 which includes a 15% contingency. Separate contracts are proposed to allow each project to proceed on its own timeline.

Alternatives

1. Take No Action
2. Refer to staff for more information

Attachments

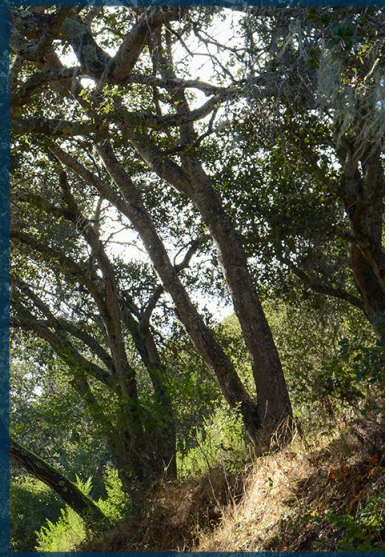
A. Exterior improvements prepared by Noll & Tam Architects for San Mateo County Libraries System, Belmont Library.
B. Construction Contract for CCN –2024-632 (Exterior)
C. Exhibit A to Construction Contract - Contractor Proposal (Gordian)
D. Exhibit B to Construction Contract - Invitation for Bids (Sourcewell)
E. Exhibit C to Construction Contract – Staples Construction Company Contract (Sourcewell)
F. General Conditions for CCN 2024-632 and 2024-633

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed: Funding is budgeted for the Belmont Library's interior and exterior painting as well as a flooring replacement under project #8087 in the Capital Improvement Program (CIP) Fund 399, with funding coming from the Library Maintenance and Operation Fund.

Source:	**Purpose:**	**Public Outreach:**
Staff	Discretionary Action	Posting of Agenda



CITY OF BELMONT

Belmont Library Exterior Improvement

City Council Meeting
September 10, 2024

CITY OF BELMONT Parks and Recreation

Background

- Library was built in 2006
- Exterior paint update is needed (industry standard: 5-10 years)
- Interior improvements will be proposed soon

Existing Exterior Paint

EXISTING STUCCO

EXISTING STUCCO & ROOF TRIM - ACCENT

EXISTING METAL FINISH (DOORS, MULLIONS)



New Exterior Paint

SW Manor House



New Exterior Paint



CONSTRUCTION AGREEMENT

This Construction Agreement (hereinafter "Agreement") is made and entered into by and between the CITY OF BELMONT, a municipal corporation (hereinafter "City"), and Staples Construction Company (hereinafter "Contractor").

RECITALS

A. In accordance with the applicable provisions of State law, including the California Public Contract Code, and local law, including the Belmont City Code, the City issued an invitation for competitive bids for this Project.

B. In response to the invitation for bids, the Contractor submitted the Bid Forms (with a Bid Amount of $123,594.51 (not including Add Alternate), which are incorporated herein by reference, which were found by the City to be responsive to the invitation for bids.

C. After reviewing all bids submitted in response to the invitation for bids, the City found the Contractor to be the Lowest Responsible Bidder, and the Awarding Body awarded this Agreement to the Contractor on **_September 10, 2024_____** .

D. The Project is more specifically described in the Contract Documents, but generally includes the following items of work interior painting and flooring replacement of the complete Belmont Library located at 1110 Alameda de las Pulgas, Belmont, CA 94002.

NOW THEREFORE, THE PARTIES MUTUALLY AGREE AS FOLLOWS:

1. **SCOPE OF WORK.** The Contractor shall perform, or cause to be performed, the Work described in the Contract Documents (hereinafter "Work"), to the satisfaction of the City Engineer, and subject to the final acceptance by the City.

2. **CONTRACT DOCUMENTS.**

2.1. **List of Contract Documents.** The Contract Documents consist of this executed Agreement; all Bidding Documents (including the Invitation for Bids, Instructions to Bidders, Supplemental Instructions to Bidders, Bid Forms, and Addenda (if any) as identified below); the Specifications (including General Conditions, Special Provisions, and all documents incorporated by reference therein, including City Standard Specifications, and Caltrans Standard Specifications), and the Technical Specifications; the Drawings (also referred to as "Plans"); and the Exhibits (including bonds).

2.2. **Precedence of Contract Documents.** In the event of a conflict between component parts of the Contract Documents, the document highest in precedence shall control. The precedence shall be as follows:

2.2.1. Agreement, as amended by contract change orders.

2.2.2. All Bidding Documents, as amended by Addenda.

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2.2.3. Technical Specifications

2.2.4. Special Provisions.

2.2.5. General Conditions

2.2.6. City Standard Specifications.

2.2.7. Caltrans Standard Specifications (Standard Specifications for Construction of Local Streets and Roads, State of California, July 2006).

2.2.8. Drawings (also referred to as Plans), as defined in attached scope of work

2.2.9. Standard Plans and Standard Details.

2.2.10. Exhibits.

2.3. **Addenda.** The following Addenda are hereby incorporated into the Contract Documents:

No.	Date of Issue:
____	_____
____	_____
____	_____

3. **CONTRACT TIME**.

3.1. After Contractor has provided to City all documents identified in the Instructions to Bidders and the Notice of Award (in a form satisfactory to the City, and in accordance with the requirements of the Contract Documents), City shall schedule the mandatory pre-construction conference, and Contractor shall attend and participate in the pre-construction conference.

3.2. After the pre-construction conference, the City shall issue a Notice to Proceed to Contractor. The Notice to Proceed will identify the date on which the "Contract Time" commences, and this date may be referred to as the "Contract Commencement Date." Contractor is authorized to commence Work on the Contract Commencement Date, and Contractor must commence the Work no later than seven days after the Contract Commencement Date. The Work must be diligently prosecuted and all of the Work must be substantially completed within the Contract Time specified in the Invitation For Bids. Time is of the essence in the performance of all obligations under these Contract Documents, and all timing requirements must be strictly adhered to unless otherwise modified by the City in accordance with the Contract Documents. The Contractor must submit all requests for extensions of time to the City, in writing, no later than ten (10) working days after the start of the condition which purportedly caused the delay, and not later than the date on which performance is due.

3.3. Within the time set forth in the Special Provisions (or, if no time is specified in the Special Provisions, with seven (7) calendar days after written request from the City), Contractor shall submit to the City all required documents, including the following:

3.3.1. Contractor's safety program, and identification of Contractor's safety officer.

3.3.2. Contractor's cost distribution schedule of prices (schedule of values).

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3.3.3. Contractor's Construction Schedule.

3.3.4. Contractor's schedule of submittals.

3.3.5. Copies of all required documentation for each subcontractor, including: State Contractor's License, identification of each subcontractors' authorized representative, copy of contract between Contractor and each subcontractor.

4. **CONTRACT AMOUNT.** City shall pay to Contractor, for the performance of the Work, the Contract Amount identified in the Bid Documents, subject to adjustment of estimated quantities (to reflect actual work performed by the Contractor), and as modified according to the terms of the Contract Documents. The Contractor's compensation shall include all costs incurred by the Contractor in the performance of the Work, including: furnishing all labor (including supervision), materials (including the costs of any and all applicable taxes, patent rights, royalties, licenses, and permits), equipment, tools, transportation, and services necessary to complete the Work (including costs to protect the Work, and all damages to the Work prior to acceptance of the Work by the City, unless otherwise specifically provided in the Contract Documents). The Contract Amount identified in the Bid Documents is $123,594.51.

5. **LIQUIDATED DAMAGES.** If Contractor fails to complete the Work within the Contract Time, Contractor shall pay to the City, as liquidated damages and not as a penalty, the sum specified in the Invitation for Bids for each calendar day after the expiration of the Contract Time that the Work remains incomplete. The City and Contractor agree that in the event the Work is not completed within the Contract Time, the City's damages would be extremely difficult or impracticable to determine and therefore the City and Contractor agree that the amount stated herein is a reasonable estimate of the amount of such damages. The City may deduct any liquidated damages owed to the City, as determined by the City, from any payments otherwise payable to Contractor under this Contract. Nothing contained herein shall limit the City's rights or remedies against Contractor for any default other than failure to complete the Work within the Contract Time. This provision for liquidated damages shall not be applicable nor act as a limitation upon the City if Contractor abandons the Work. In such event, Contractor shall be liable to the City for all losses incurred.

6. **CONTRACTOR REPRESENTATIVE.** At all times during the progress of the Work, Contractor shall have a competent supervisor, foreman, or superintendent (hereinafter "Contractor Representative") on site with authority to act on behalf of the Contractor. The Contractor Representative shall be authorized by the Contractor to sign, send, and receive all notices contemplated or required by the Contract Documents, and authorized to direct all Work being performed by (or on behalf of) the Contractor. The Contractor shall, at all times, keep the City Engineer informed in writing of the name and telephone number of the Contractor Representative. Throughout the term of this Contract, Contractor Representative shall meet and confer with the City Engineer in a good faith effort to resolve any outstanding issues related to performance required by the Contract Documents. The Contractor shall, at all times, keep the City Engineer informed in writing of the names and telephone numbers of all subcontractors performing the Work.

7. **ACCESS TO THE SITE.** In order to permit the City to inspect the Work, the Contractor shall, at all times, provide to the City (including agencies and entities designated by the City) proper and safe access to the Project site, and all portions of the Work, and to all shops wherein portions of the Work are in preparation.

8. DOCUMENTATION AND RECORD KEEPING.

8.1. **Contractor's Project Records.** Contractor's Project records shall include all of Contractor's accounting records, employment records, and project work records for all employees, subcontractors, and suppliers, including: the Contract Documents, one record copy of the plans and specifications, change orders, requests for clarifications, instructions from the City, contracts with suppliers and subcontractors, correspondence, submittals, samples, shop drawings, invoices, receipts, vouchers, purchase orders, notes, daily logs, and memoranda relating to the Work.

8.2. **Contractor's Maintenance of Project Records.** Contractor shall keep and preserve Project records in accordance with generally accepted accounting principles and state law requirements. During performance of the Work, Contractor shall keep all of Contractor's Project records in a secure location at the Project Site. After completion of the Work, Contractor shall maintain the Project records for no less than four years after final completion of the Work.

8.3. **Audit by the City.** All of Contractor's Project records, as identified above, shall be made available to the City (including agencies and entities designated by the City), and the Contractor shall provide copies of the Contractor's records upon request by the City.

9. RESPONSIBILITY OF CONTRACTOR AND SUBCONTRACTORS.

9.1. Contractor is an independent contractor and is solely responsible for all acts of its employees, agents, or subcontractors, including any negligent acts or omissions. Contractor is not City's employee and Contractor shall have no authority, express or implied, to act on behalf of the City as an agent, or to bind the City to any obligation whatsoever, unless the City provides prior written authorization to Contractor.

9.2. For each subcontractor performing any portion of the Work for this Project, the Contractor shall include a provision in the subcontract documents incorporating by reference the requirements of these Contract Documents, to require the subcontractor to comply with the requirements of these Contract Documents as related to the portion of the Work performed by the subcontractor. This requirement shall specifically include: indemnification of the City (Agreement Section 16), business tax compliance (Agreement Section 12), insurance (Agreement Section 14), and nondiscrimination and compliance with law (Agreement Section 11.1).

10. **CONFLICTS OF INTEREST.** Contractor (including its employees, agents, and subcontractors) shall not maintain or acquire any direct or indirect interest that conflicts with the performance of this Agreement. In the event that Contractor maintains or acquires such a conflicting interest, any contract (including this Agreement) involving Contractor's conflicting interest may be terminated by the CITY.

11. **COMPLIANCE WITH LAW.** The Contractor shall comply with all applicable legal requirements including all federal, state, and local laws (including ordinances, resolutions, and City Regulations), whether or not said laws are expressly stated in this Agreement.

11.1. **Nondiscrimination.** Contractor shall comply with all applicable federal, state, and local laws regarding nondiscriminatory employment practices, whether or not said laws are expressly stated in this Agreement. Contractor shall not discriminate against any employee or applicant because of

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race, color, religious creed, national origin, physical disability, mental disability, medical condition, marital status, sexual orientation, or sex.

11.2. **Labor Compliance.** Contractor must comply with all applicable federal, state, and local laws regarding labor compliance, including, but not limited to, all applicable provisions related to working hours, the payment of prevailing wages, travel and subsidence payments, apprentices, payroll records, and labor code penalties (as required by California Labor Code Sections 1720 through 1861, and as outlined in the General Conditions). Copies of the prevailing wage rates are on file with the City Engineer, and shall be made available to any interested party upon request. See General Conditions Section 19 for more detail.

11.3. **Department of Industrial Relations Registration**. No contractor or subcontractor may be listed on a bid proposal for or work on a public works project unless registered with the Department of Industrial Relations under Labor Code section 1725.5 or submitting a bid as part of a joint venture authorized by Business and Professions Code Section 7029.1 or by Public Contract Code Section 10164 and 20103.5, provided the contractor is registered to perform public work under Section 1725.5 at the time the contract is awarded.

11.4. **Subcontractor Eligibility.** Contractor acknowledges that under Public Contract Code Section 6109 no contractor or subcontractor who is ineligible to bid or work on, or be awarded, a public works project under Labor Code Section 1777.1 or 1777.7 may bid on, be awarded, or perform work as a subcontractor on, a public works project. Contractor is prohibited from performing work on a public works project with a subcontractor who is ineligible to perform work on the public works project under Labor Code Section 1777.1 or 1777.7.

12. **PERMITS AND LICENSES.** The Contractor must obtain and maintain all necessary permits and licenses for the performance of the Work.

12.1. **Belmont Business License Tax.** Contractor must apply for and pay the business tax and registration tax for a business license, in accordance with the Belmont City Code.

12.2. **Fees, Royalties, and Patents.** Contractor must pay all license fees and royalties related to or necessary for the Work and assume all costs incident to the use in the performance of the Work or the incorporation in the Work of any invention, design, process, product, or device that is the subject of patent rights or copyrights held by others.

13. **IMPROVEMENT SECURITY.** Concurrently with the execution of this Agreement by the Contractor, and before the commencement of any Work, the Contractor shall furnish improvement security, in a form substantially the same as that set forth in the Exhibits, attached hereto, or in an alternate form authorized by state law and approved by the City, in the following amounts:

13.1. **Faithful Performance** security in the amount of 100 % of the Contract Amount to secure faithful performance of this Agreement (until the date on which the City accepts the Work as complete).

13.2. **Labor and Material** security in the amount of 100% of the Contract Amount to secure payment by the Contractor to laborers and materialmen (until the date on which claims are required to be made by laborers and materialmen pursuant to law).

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13.3. **Warranty** security in the amount of 10% of the Contract Amount to secure faithful performance of this Agreement (from the date on which the City accepts the Work as complete until one year thereafter).

14. **INSURANCE**. Contractor must comply with the following insurance specifications. City may modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

14.1. **Duration**. Throughout the duration of this Agreement, Contractor must maintain insurance to cover Contractor (including its agents, representatives, subconsultants, suppliers, and employees) in connection with the performance of Work under this Agreement, including against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Work.

14.2. **Minimum Coverage**. This Agreement identifies the minimum insurance levels with which Contractor must comply; however, the minimum insurance levels do not relieve Contractor of any other performance responsibilities under this Agreement (including the indemnity requirements). Contractor must maintain insurance in the following minimum levels:

14.2.1. **Workers' Compensation**. Workers' compensation coverage as required by the State of California, with statutory limits.

14.2.2. **Commercial General Liability** (CGL). Commercial general liability with coverage at least as broad as ISO form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury in an amount not less than $5,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit must apply separately to this project/location or the general aggregate limit must be twice the required occurrence limit.

14.2.3. **Employer's Liability**. Employer's liability in an amount not less than $1,000,000 per accident for bodily injury or disease.

14.2.4. **Automobile Liability**. Automobile liability with coverage at least as broad as ISO Form Number CA 0001 covering Code 1 (any auto) in an amount not less than $5,000,000 per accident for bodily injury and property damage (coverage required to the extent applicable to Contractor's vehicle usage in performing services hereunder).

14.2.5. **Professional Liability**. For design-build projects, or if the Work requires Contractor to provide professional services related to environmental hazards, professional liability in an amount not less than $2,000,000 per occurrence or claim, and not less than $2,000,000 policy aggregate.

14.2.6. **Contractors' Pollution Legal Liability.** If the Work involves environmental hazards, Contractors' pollution legal liability in an amount not less than $1,000,000 per occurrence or claim, and $2,000,000 policy aggregate.

14.2.7. **Asbestos Legal Liability**. If the Work involves asbestos removal, asbestos legal liability in an amount not less than $1,000,000 per occurrence or claim, and $2,000,000 policy aggregate.

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14.2.8. **Builder's Risk (Course of Construction).** Builder's risk insurance utilizing an "All Risk" (Special Perils) coverage form in an amount equal to the completed value of the project and no coinsurance penalty provisions.

14.2.8.1. Builder's Risk insurance must name City as a loss payee as their interest may appear.

14.2.8.2. If the project does not involve new or major reconstruction, at the option of City, an Installation Floater may be acceptable. For such projects, a Property Installation Floater shall be obtained that provides for the improvement, remodel, modification, alteration, conversion or adjustment to existing buildings, structures, processes, machinery and equipment. The Property Installation Floater shall provide property damage coverage for any building, structure, machinery or equipment damaged, impaired, broken, or destroyed during the performance of the Work, including during transit, installation, and testing at the Entity's site.

14.3. **Additional Coverage**. Contractor may carry, at its own expense, any additional insurance it deems necessary or prudent. If Contractor maintains higher levels than the minimums shown above, City is entitled to coverage for the higher limits maintained by Contractor. Any available insurance proceeds in excess of the specified minimum levels of insurance and coverage must be available to the City.

14.4. **Insurer Qualifications**. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the Entity. Exception may be made for the State Compensation Insurance Fund when not specifically rated.

14.5. **Umbrella or Excess Policies**. Contractor may use umbrella or excess policies to provide the liability limits as required in this Agreement. This form of insurance will be acceptable provided that all of the primary and umbrella or excess policies provide all of the insurance coverages herein required, including, but not limited to, primary and non-contributory, additional insured, self-insured retentions (SIRs), indemnity, and defense requirements. The umbrella or excess policies must be provided on a true "following form" or broader coverage basis, with coverage at least as broad as provided on the underlying Commercial General Liability insurance. No insurance policies maintained by the additional insureds, whether primary or excess, and which also apply to a loss covered hereunder, may be called upon to contribute to a loss until the Contractor's primary and excess liability policies are exhausted.

14.6. **Self-Insured Retention and Deductibles.** Self-insured retentions (SIR) must be declared to and approved by City.

14.6.1. The City may require Contractor to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

14.6.2. Policies must provide, or be endorsed to provide, that self-insured retention may be satisfied by either the named insured or City. Policies must NOT contain any self-insured retention provision that limits the satisfaction of the SIR to the named insured. Policies must provide that defense costs, including allocated loss adjustment expenses, will satisfy the SIR or deductible.

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14.6.3. CGL and any policies, including Excess liability policies, may not be subject to a self-insured retention or deductible that exceeds $50,000 unless approved in writing by City. City may deduct from any amounts otherwise due Consultant to fund any SIR and any deductibles.

14.6.4. Any and all deductibles and SIRs are the sole responsibility of Contractor or subcontractor who procured such insurance and must not apply to the Indemnified Additional Insured Parties.

14.7. **Subrogation Waiver.** Contractor hereby grants to City a waiver of any right to subrogation which any insurer of Contractor may acquire against the City by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation. The Workers' Compensation policy must be endorsed with a waiver of subrogation in favor of City for all work performed by Contractor, its employees, agents and subcontractors. This provision applies regardless of whether or not the City has requested or received a waiver of subrogation endorsement from the insurer.

14.8. **Verification of Coverage**. Concurrently with the execution of this Agreement, Consultant must furnish City with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by these insurance specifications and a copy of the declarations and endorsements pages of the CGL and any Excess policies listing all policy endorsements. All certificates and endorsements and copies of the declarations and endorsements pages are to be received and approved by City before work commences. However, failure to provide the required documents before work begins will not waive the Consultant's obligation to provide them. City may require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

14.9. **Endorsements**. The insurance policies must be endorsed as follows:

14.9.1. For commercial general liability and automobile liability insurance, the City (including its elected officials, employees, and agents) must be named as an additional "insured". The endorsement must include liability arising out of work or operations performed by or on behalf of Contractor including materials, parts, or equipment furnished in connection with such work or operations and automobiles owned, leased, hired or borrowed by or on behalf of Contractor. For commercial general liability, the policy must be endorsed with a form at least as broad as ISO form CG 20 10, GC 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used.

14.9.2. Contractor's insurance is primary to any other insurance (including self-insurance) available to the City (including its elected officials, employees, and agents) with respect to any claim arising out of this Agreement. Any insurance maintained by the City shall be excess of the Contractor's insurance and shall not contribute with it.

14.9.3. No policy shall be canceled, limited, or allowed to expire without renewal until after 30 days written notice has been given to the City by first class mail.

14.10. **Claims Made Policies**. If any required coverage is made on a claims-made form:

14.10.1. The "Retro Date" must be shown, and must be before the date of the contract or the beginning of contract work.

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14.10.2. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work.

14.10.3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a "Retro Date" prior to the contract effective date, Contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

14.10.4. A copy of the claims reporting requirements must be submitted to City for review.

14.10.5. If the services involve lead-based paint or asbestos identification/remediation, Contractor's Pollution Liability policy shall not contain lead-based paint or asbestos exclusions. If the services involve mold identification/remediation, Contractor's Pollution Liability policy shall not contain a mold exclusion, and the definition of Pollution shall include microbial matter, including mold.

14.11. **Subcontractors**. Contractor must require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor must ensure that City is an additional insured on insurance required from subcontractors. For CGL coverage subcontractors must provide coverage with a format least as broad as CG 20 38 04 13.

15. **REPORTING DAMAGES.** If any damage (including death, personal injury or property damage) occurs in connection with the performance of this Agreement, Contractor must immediately notify the City Risk Manager's office by email at finance@belmont.gov, and Consultant shall promptly submit to the City's Risk Manager and the City's Authorized Representative, a written report (in a form acceptable to the City) with the following information: (a) name and address of the injured or deceased person(s), (b) name and address of witnesses, (c) name and address of Consultant's insurance company, and (d) a detailed description of the damage and whether any City property was involved.

16. **RESPONSIBILITY FOR LOSS**.

16.1. The City and its elected officials, officers, employees, agents and volunteers, shall not be answerable or accountable in any manner: for any loss or damage that may happen to the work or any part thereof; for any loss or damage to any of the materials or other things used or employed in performing the work; for injury to or death of any person (including but not limited to workers or the public) from any cause whatsoever; or for damage to property from any cause whatsoever.

16.2. The Contractor shall be responsible for any liability imposed by law and for injuries to or death of any person (including but not limited to workers and the public) or damage to property resulting from defects or obstructions or from any cause whatsoever during the progress of the work or at any time before its completion and final acceptance. The Contractor shall indemnify and save harmless the City of Belmont and its elected officials, officers, employees, agents and volunteers from all claims, suits or actions of every name, kind and description brought for, or on account of, injuries to or death of any person (including but not limited to employees of Contractor, of subcontractor, or of any other person, firm or entity and the public) or damage to property arising from any cause whatsoever during the progress of the work or at any time before its final completion and acceptance. Contractor's indemnification shall specifically include, but not be limited to, all claims arising out of: contract claims, property damage, personal injury, and any

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infringement of patent rights or copyrights incidental to the use in the performance of the Work or resulting from the incorporation in the Work of any invention, design, process, product, or device not specified in the Contract Documents. Contractor's indemnification shall include any and all costs, expenses, court costs, attorneys' fees and liability incurred by the City in enforcing the provisions of this section, and in defending against such claims, whether the same proceed to judgment or not. Contractor shall reimburse City for any expenditures City incurs by reason of such matters. The duty of the Contractor to indemnify and save harmless includes the duties to defend as set forth in Section 2778 of the Civil Code. This indemnification shall survive termination of the Contract.

The Contractor waives any and all rights to any type of express or implied indemnity against the City, and its officers, officials, agents, employees and volunteers. It is the intent of the parties that the Contractor shall indemnify and hold harmless the City, and its elected officials, officers, agents, employees and volunteers from any and all claims, suits, or actions arising from any cause whatsoever as set forth above regardless of the existence or degree of fault or negligence on the part of the City, the Contractor, the subcontractor or employee of any of these, other than the sole negligence, active negligence or willful misconduct of the City, and its elected officials, officers, agents, employees and volunteers.

16.3. In addition to any remedy authorized by law, so much of the money due the Contractor under and by virtue of the Agreement as shall be considered necessary by the City may be retained by the City until disposition has been made of such suits or claims for damages as aforesaid.

16.4. Neither the elected officials, officers, agents, employees not volunteers of City, nor any officer or employee of any county, city or district shall be personally responsible for any liability arising under or by virtue of the Agreement.

16.5. Nothing in the Agreement is intended to make the public or any person a third party beneficiary under this Contract, nor is any term and condition or other provision of the Agreement intended to establish a standard of care owed to the public or any member thereof. Attention is directed to Section 23, "Insurance Hold Harmless," of the General Conditions for the Contractor's responsibility for providing and maintaining insurance.

17. **ACCEPTANCE OF WORK.** Before acceptance of the Work by the City, the Contractor shall be solely responsible for maintaining the quality of the Work, and maintaining safety at the Project site. The Contractor's obligation to perform the Work shall not be satisfied until after the City Engineer has made a written determination that all obligations of the Agreement have been satisfied and all outstanding fees and charges have been paid, and the City has accepted the Work as complete.

18. **WARRANTY.**

18.1. **Quality of Work.** Contractor warrants to the City that all materials and equipment used in or incorporated into the Work will be of good quality, new, and free of liens, claims, and security interests of third parties; and that the Work will be of good quality and free from defects; and that the Work will conform with the requirements of the Contract Documents.

18.2. **Documentation of Warranty.** If required by the City Engineer, Contractor shall furnish satisfactory evidence as to the kind and quality of materials and equipment. If required by the

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Contract Documents, the Contractor shall provide a written warranty from the manufacturer or supplier.

18.3. **Warranty Period.** The Contractor shall warrant the quality of the Work, in accordance with the terms of the Contract Documents, for the "Warranty Period." The Warranty Period shall be a one year period (unless a longer period of time is specified in the Contract Documents) commencing as follows: (a) for any Work not identified as incomplete in the Certificate of Substantial Completion, commencing on the date of Substantial Completion; and (b) for any Work that is identified as incomplete in the Certificate of Substantial Completion, commencing on the date of Final Completion.

18.4. **Default During Warranty Period.** In the event that (during the Warranty Period) any portion of the Work is determined by the City Engineer to be defective as a result of an obligation of the Contractor under this Agreement (including any faulty workmanship or material, or any failure of the Work to operate in accordance with the requirements of the Contract Documents), the Contractor shall be in default.

19. **DEFAULT**.

19.1. **Notice of Default**. In the event that the Contractor is in default of this Agreement, as defined in this section, the City Engineer shall provide written notice to the Contractor and the Contractor's surety (if any) in which the default is described.

19.2. **Circumstances Constituting Default**. Contractor shall be in default of this Agreement if the City Engineer determines that any one of the following conditions exists:

19.2.1. Contractor fails to perform any portion of the Work in accordance with the timing requirements of the Construction Schedule.

19.2.2. Contractor abandons the Project site.

19.2.3. Contractor fails to replace or repair any damage caused by Contractor or its agents, representatives, contractors, subcontractors, or employees in connection with performance of the Work.

19.2.4. Contractor fails to supply workers, subcontractors, or other personnel with the skills, certifications, or licenses required by the Contract Documents.

19.2.5. Contractor violates any legal requirement related to the Work.

19.2.6. Contractor is insolvent, files for bankruptcy, makes a general assignment for the benefit of its creditors, or fails to pay its debts as they become due.

19.2.7. Contractor fails to perform any portion of the Work in accordance with the requirements of the Contract Documents.

19.3. **City Remedies**. The City may, in the discretion of the City Engineer, take any or all of the actions identified in this subsection, if the Contractor fails to: (a) promptly commence, and diligently and continuously prosecute the cure of the default, or (b) within ten (10) days, cure the default, or provide adequate written assurance to the satisfaction of the City Engineer that the cure will be promptly commenced and diligently prosecuted to its completion:

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19.3.1. Demand the Contractor to complete performance of the Work (including repair, or removal and replacement, of nonconforming Work).

19.3.2. Issue a Notice of Suspension of Work, by which the Contractor shall suspend all Work except for those portions of the Work authorized by the Notice, and for which the Contractor shall not be entitled to any adjustment of the Contract Amount or Contract Time. Notwithstanding the timing requirements of this Section 19.3, if the City Engineer determines that a default may have a potentially adverse impact on the safety of persons or property (including but not limited to a failure by the Contractor to maintain documentation of insurance or improvement security as required by this Agreement), the City Engineer may immediately issue a Notice of Suspension of Work in accordance with this subsection.

19.3.3. Cure the default and charge the Contractor for all costs resulting therefrom, including administrative costs (including City staff costs, City consultant costs, and attorney's fees) and interest in an amount equal to seven percent (7 %) per annum from the date of default, which charge may be deducted by the City from amounts otherwise payable to the Contractor.

19.3.4. Remove the Contractor from the site and demand the Contractor's surety (if any) to complete performance of the Work.

19.3.5. Take possession of the Project site and all materials, supplies, equipment, tools, and construction equipment and machinery thereon owned by Contractor; accept the assignment of any or all of the subcontracts; and then complete the Work by any method the City may deem expedient. If requested by the City, Contractor shall remove any part or all of Contractor's materials, supplies, equipment, tools, and construction equipment and machinery from the Project site within seven (7) days of such request; and if Contractor fails to do so, the City may remove or store, and after ninety (90) days sell, any of the same at Contractor's expense.

19.3.6. Terminate the Contract.

19.4. **Termination for Default**. In the event that the Contract is terminated by the City in accordance with this section:

19.4.1. Contractor shall not be entitled to receive any further payment until the expiration of thirty-five (35) days after Final Completion and acceptance of all Work by the City

19.4.2. If the unpaid balance of the Contract Amount (to which the Contractor is otherwise entitled in accordance with the Contract) exceeds the cost of completing the Work (including all additional costs and expenses made necessary thereby, plus all losses sustained, including any liquidated damages provided under the Contract Documents), such excess shall be paid to Contractor. If the cost of completing the Work exceeds the unpaid balance of the Contract Amount, Contractor shall pay such excess to the City.

19.4.3. No termination or action taken by the City after termination shall prejudice any other rights or remedies of the City provided by law or by the Contract Documents upon such termination; and the City may proceed against Contractor to recover all losses suffered by the City.

20. **NOTICES.** All notices or demands which the Contract Documents contemplates or requires shall be in writing and shall be delivered to the respective party as set forth in this section. Communications shall be deemed to be effective on the first to occur of: (a) actual receipt by a party's Authorized Representative; (b) actual receipt at the address designated below; or (c) three working

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days following the deposit in the United States Mail of registered or certified mail, sent to the address designated below. The Authorized Representative of either party may modify their respective contact information identified in this section by providing notice to the other party.

TO: City of Belmont	**To: Contractor**
Attn:. Brigitte Shearer	Attn: XXXXXXXXXXXX
Belmont Parks and Recreation	Staples Construction Company
30 Twin Pines Lane	XXXXXXXXXXXX
Belmont, CA 94002	XXXXXXXXXXXX

21. **HEADINGS.** The heading titles for each paragraph of the Contract Documents are included only as a guide to the contents and are not to be considered as controlling, enlarging, or restricting the interpretation of the Contract Documents.

22. **SEVERABILITY.** If any term of the Contract Documents (including any phrase, provision, covenant, or condition) is held by a court of competent jurisdiction to be invalid or unenforceable, the Contract Documents shall be construed as not containing that term, and the remainder of this Agreement shall remain in full force and effect; provided, however, this section shall not apply to the extent that enforcement of the Contract Documents without the term would be grossly inequitable under all the circumstances or would frustrate the purposes of the Contract Documents.

23. **INTERPRETATION OF CONTRACT DOCUMENTS**.

23.1. **Governing Law, Jurisdiction, and Venue.** The interpretation, validity, and enforcement of the Contract Documents shall be governed by and construed under the laws of the State of California. Any suit, claim, or legal proceeding of any kind related to this Agreement shall be filed and heard in a court of competent jurisdiction in the County of San Mateo.

23.2. **Industry Standards.** When Contract terms have a customary technical or trade meaning, the terms shall be interpreted in accordance with that meaning.

23.3. **Standard Specifications and Codes.** References to any regulations (including: standard specifications, manuals or codes of a technical society, organization or association; or laws or regulations of any governmental authority) shall mean the regulations in effect at the time of the Bid Opening, unless otherwise specifically identified in the Contract Documents.

24. **ATTORNEY'S FEES.** In the event any legal action is commenced to enforce the Contract Documents, the prevailing party is entitled to reasonable attorney's fees, costs, and expenses incurred, not to exceed $10,000.

25. **ASSIGNMENT AND DELEGATION**.

25.1. **Assignment of The Contract Documents.** The Contract Documents, and any portion thereof, shall not be assigned or transferred, nor shall any of the Contractor's duties be delegated, without the written consent of the City. Any attempt to assign or delegate the Contract Documents without

the written consent of the City shall be void and of no force or effect. A consent by the City to one assignment shall not be deemed to be a consent to any subsequent assignment.

25.2. **Antitrust Claims.** As required by the instructions to bidders and Government Code Section 4552, the Contractor hereby agrees to assign to the City, all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Action (15 U.S.C. Section 15) or under the Cartwright Act (Chapter 2 [commencing with Section 16700] of Part 2 of Division 7 of the California Business and Professions Code), arising from purchases of goods, services, or materials pursuant to the public works contract or the subcontract. This assignment shall be made and become effective at the time the City tenders final payment to the Contractor, without further acknowledgment by the parties. The Contractor further warrants that all goods, services, and materials provided to the City in accordance with this Contract are free and clear of all liens and encumbrances.

26. **MODIFICATIONS.** The Contract Documents may not be modified orally or in any manner other than by an agreement of the parties, in writing, in accordance with requirements of the Contract Documents.

27. **WAIVERS.** Waiver of a breach or default under the Contract Documents shall not constitute a continuing waiver or a waiver of a subsequent breach of the same or any other provision of the Contract Documents.

28. **CONFLICTS.** If any conflicts arise between the terms and conditions of this Agreement and the terms and conditions of the attached exhibits or any documents expressly incorporated, the terms and conditions of this Agreement shall control.

29. **ENTIRE AGREEMENT.** The Contract Documents, including all documents incorporated herein by reference, comprise the entire integrated understanding between the City and Contractor concerning the Work to be performed for this Project. The Contract Documents supersede all prior negotiations, agreements, and understandings regarding this matter, whether written or oral. The Contract Documents are complementary; what is called for in one is binding as if called for by all. To the extent that portions of the Contract Documents are not attached to this Agreement, they shall be deemed incorporated herein by reference.

30. **SIGNATURES.** The individuals executing this Agreement represent and warrant that they have the right, power, legal capacity, and authority to enter into and to execute the Contract Documents on behalf of the respective legal entities of the Contractor and the City. The Contract Documents shall inure to the benefit of and be binding upon the parties hereto and their respective successors and assigns.

IN WITNESS WHEREOF the City and the Contractor do hereby agree to the full performance of the terms set forth herein.

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CITY OF BELMONT

By: _____
Afshin Oskoui, City Manager

Date: _____

APPROVED AS TO FORM

_____
Scott M. Rennie, City Attorney

FUNDING VERIFIED

_____
Grace Castaneda, Finance Director

CONTRACTOR

By: _____

_____
(print name) (print title)

Date: _____

By: _____

_____
(print name) (print title)

Date: _____

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INSTRUCTIONS FOR SIGNATURES – DO NOT INCLUDE WITH SIGNED CONTRACT

****

[PLEASE SELECT THE APPROPRIATE SIGNATURE BLOCK FROM THE FOLLOWING SAMPLES]

CORPORATIONS

XYZ Land Development Inc,
a California corporation

By: _____

Its: _____
[needs to be officer from the operations side:
President, CEO, Vice President]

By: _____

Its: _____
[needs to be officer from the finance side: Treasurer, CFO, Secretary]

One corporate signature is acceptable if the person is an officer if the signature is notarized (although we would like you to ask for a corporate resolution showing that person is authorized to sign). A single signature where the person is not a corporate officer – eg general manager, etc – must be supported by a corporate resolution indicating that person has been delegated authority to sign contracts on behalf of the corporation

GENERAL PARTNERSHIPS

XYZ Land Development,
a California general partnership

By: _____

Its: General Partner

LIMITED PARTNERSHIPS

XYZ Land Development, LLP,
A California limited partnership

By: _____

Its: General Partner
[need limited partnership agreement or certificate filed with state showing the person or entity is the general partner]

In many cases the general partner will be a corporation so the signature block would look like this:

XYZ Land Development, LP,
A California limited partnership

By: ABC Developers, Inc,
a California corporation

Its: General Partner

By: _____

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Its: President, CEO, VP

By: _____

Its: Secretary, Treasurer, CFO

LIMITED LIABILITY COMPANY
XYZ Land Development, LLC,
a California Limited Liability Company

By: _____

Its: Managing Member
[we need to see the operating agreement or certificate filed with secretary of state showing the person or entity is the managing member]

If the Managing Member is not an individual, but is a business entity then you would indent the signature block for the appropriate persons to sign as in the example for the limited partnership above.

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PAYMENT BOND

Bond No. _____

WHEREAS, _____("Principal") has entered into an Agreement with the City of Belmont ("City") to perform the Project identified on this Bond, the terms and conditions of which are incorporated herein by reference; and the terms of the Agreement require the Principal to submit payment (labor & material) to secure the claims made under Title 3 (commencing with Section 9000) of Part 6 of Division 4 of the Civil Code.

NOW, THEREFORE, Principal and _____ ("Surety"), are held firmly bound unto the City and all contractors, subcontractors, laborers, material suppliers, and other persons employed in the performance of the Agreement and referred to in Title 3 (commencing with Section 9000) of Part 6 of Division 4 of the Civil Code in the sum of $_____, for materials furnished or labor thereon of any kind, or for amounts due under the Unemployment Insurance Act with respect to this work or labor, that the surety will pay the same in an amount not exceeding the amount hereinabove set forth, and also in case suit is brought upon this bond, will pay, in addition to the face amount thereof, costs and reasonable expenses and fees, including reasonable attorney's fees, incurred by county (or city) in successfully enforcing this obligation, to be awarded and fixed by the court, and to be taxed as costs and to be included in the judgment therein rendered.

It is hereby expressly stipulated and agreed that this bond shall inure to the benefit of any and all persons, companies, and corporations entitled to file claims under Title 3 (commencing with Section 9000) of Part 6 of Division 4 of the Civil Code, so as to give a right of action to them or their assigns in any suit brought upon this bond.

Should the condition of this bond be fully performed, then this obligation shall become null and void, otherwise it shall be and remain in full force and effect.

The surety hereby stipulates and agrees that no change, extension of time, alteration, or addition to the terms of the agreement or the specifications accompanying the same shall in any manner affect its obligations on this bond, and it does hereby waive notice of any such change, extension, alteration, or addition.

IN WITNESS WHEREOF, the undersigned represent and warrant that they have the right, power, legal capacity, and authority to enter into and execute this document on behalf of the Principal and the Surety, and have caused this document to be executed by setting hereto their names, titles, and signatures.

Principal	**Surety**
_____	_____
By: _____	By: _____
Title: _____	Title: _____
Date: _____	Date: _____
	Address for Notices to Surety: _____
	_____
	_____

NOTARY ACKNOWLEDGMENT FOR SURETY AND SURETY'S POWER OF ATTORNEY MUST BE ATTACHED.

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MAINTENANCE BOND

(To be executed after acceptance of project by the City Council)

KNOW ALL MEN BY THESE PRESENTS, that we, _____ as Principal, and _____, as Surety, are held and firmly bound unto the City of Belmont (hereinafter called the Obligee), in the penal sum of _____ Dollars ($_____) for the payment of which, well and truly to be made, we do hereby bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS, Principal has heretofore entered into a contract with the Obligee for the _____Project, City Contract No._____; and,

WHEREAS, the work called for under the contract has now been completed and accepted by Obligee;

NOW, THEREFORE, THE CONDITIONS OF THIS OBLIGATION IS SUCH, that if the Principal shall for a period of one (1) year from and after the date of the completion and acceptance of the contract indemnify the Obligee against any loss or damage directly arising by reason of any defect in the material or workmanship that may be discovered within the period aforesaid, then this obligation shall be void; otherwise to remain in full force and effect.

All suits at law or proceedings in equity to recover on this bond must be instituted within twelve (12) months after the expiration of the maintenance period provided for herein.

Principal: _____	Surety: _____
Corporate Seal (where appropriate)	Corporate Seal (where appropriate)
_____	_____
Authorized Signature	Authorized Signature
_____	_____
Printed name and title	Printed name and title
_____	_____
Date	Date
_____	_____
Street Address	Street Address
_____	_____
City, State, Zip Code	City, State, Zip Code

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Work Order Signature Document

EZIQC Contract No.: CA-R4-GB-101723-STA

[X] **New Work Order** [ ] **Modify an Existing Work Order**

Work Order Number.: 132670.00 Work Order Date: 09/05/2024

Work Order Title: Belmont Library Exterior Painting

Owner Name:	City of Belmont Belmont Parks & Recrea	Contractor Name:	Staples Construction Company, Inc.
Contact:	Brigitte Shearer	Contact:	Mark Hodge
Phone:	(650) 595-7488	Phone:	(916) 210 8130

Work to be Performed

Work to be performed as per the Final Detailed Scope of Work Attached and as per the terms and conditions of Sourcewell EZIQC Contract No CA-R4-GB-101723-STA.

Brief Work Order Description:

Exterior Paint: • Paint all stucco areas, metal doors and frames • Paint all railings • No flashing/ sheet metal • Add Alt#1 – Mechanical Pit Interior stucco

Time of Performance Estimated Start Date:

Estimated Completion Date:

Liquidated Damages Will apply: [ ] Will not apply: [X]

Work Order Firm Fixed Price: $131,148.58

Owner Purchase Order Number:

Approvals

City of Belmont Belmont Parks & Recreation Date

Contractor Date

Detailed Scope of Work

To: Mark Hodge
Staples Construction Company
6510 Lonetree Boulevard, Suite 101
Rocklin, CA 95765
(916) 210 8130

From: Brigitte Shearer
City of Belmont Belmont Parks & Recreation
30 Twin Pines Lane
Belmont, CA 94002
(650) 595-7488

Date Printed: September 05, 2024

Work Order Number: 132670.00

Work Order Title: Belmont Library Exterior Painting

Brief Scope: Exterior Paint: • Paint all stucco areas, metal doors and frames • Paint all railings • No flashing/ sheet metal • Add Alt#1 – Mechanical Pit Interior stucco

☐ **Preliminary** ☐ **Revised** ☒ **Final**

The following items detail the scope of work as discussed at the site. All requirements necessary to accomplish the items set forth below shall be considered part of this scope of work.

See attached.

Subject to the terms and conditions of EZIQC Contract **CA-R4-GB-101723-STA**.

Contractor _____ Date _____

City of Belmont Belmont Parks & Recreation _____ Date _____

Contractor's Price Proposal - Summary

Date: September 05, 2024

Re:

IQC Master Contract #:	CA-R4-GB-101723-STA
Work Order #:	132670.00
Owner PO #:	
Title:	Belmont Library Exterior Painting
Contractor:	Staples Construction Company, Inc.
Proposal Value:	$131,148.58

Add Alt Mechanical Pit	**$7,554.07**
Section - 01	**$30,793.56**
Section - 07	**$8,912.58**
Section - 09	**$83,888.37**
Proposal Total	**$131,148.58**

Thisl total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding.

Contractor's Price Proposal - Detail

Date: September 05, 2024

Re:

IQC Master Contract #:	CA-R4-GB-101723-STA
Work Order #:	132670.00
Owner PO #:	
Title:	Belmont Library Exterior Painting
Contractor:	Staples Construction Company, Inc.
Proposal Value:	$131,148.58

	Sect.	Item	Mod.	UOM	Description	Line Total
Labor	Equip.	Material	(Excludes)			
Add Alt Mechanical Pit						
1	07 92 13	00 0005		CLF	3/8" x 3/8" Joint, Silicone Sealant And Caulking	$1,143.03
				Installation	Quantity 1.50 x Unit Price 476.32 x Factor 1.5998 = Total 1,143.03	
					Quantity captures multiple passes.	
2	07 92 13	00 0005	0092	MOD	For Custom Match Coloring, Add	$72.33
				Installation	Quantity 1.50 x Unit Price 30.14 x Factor 1.5998 = Total 72.33	
3	07 92 13	00 0005	0099	MOD	For Up To 2.5 CLF, Add	$64.70
				Installation	Quantity 1.50 x Unit Price 26.96 x Factor 1.5998 = Total 64.70	
4	09 01 90	52 0006		SF	Hand Scrape, Concrete And Masonry Surfaces, Surface Preparation	$259.17
				Installation	Quantity 225.00 x Unit Price 0.72 x Factor 1.5998 = Total 259.17	
					Used to prep other than normal damaged areas to prepare for priming and painting. Estimated 20% of 1125 SF = 225 SF	
5	09 01 90	52 0006	0326	MOD	For >100 To 250, Add	$129.58
				Installation	Quantity 225.00 x Unit Price 0.36 x Factor 1.5998 = Total 129.58	
6	09 01 90	52 0053		SF	2,000 To 5,000 PSI Pressure Wash Plaster/Stucco Surfaces, Surface Preparation	$1,025.87
				Installation	Quantity 1,125.00 x Unit Price 0.57 x Factor 1.5998 = Total 1,025.87	
7	09 91 13	00 0098		SF	1 Coat Primer, Sprayed, Paint Exterior Stucco Walls	$1,457.82
				Installation	Quantity 1,125.00 x Unit Price 0.81 x Factor 1.5998 = Total 1,457.82	
					Used to prime exterior mechanical pit walls.	
8	09 91 13	00 0100		SF	2 Coats Paint, Sprayed, Paint Exterior Stucco Walls	$3,401.57
				Installation	Quantity 1,125.00 x Unit Price 1.89 x Factor 1.5998 = Total 3,401.57	
					Used to paint exterior mechanical pit walls	
Subtotal for Add Alt Mechanical Pit						**$7,554.07**
Section - 01						
9	01 22 16	00 0002		EA	Reimbursable FeesReimbursable Fees will be paid to the contractor for eligible costs as directed by Owner. Insert the appropriate quantity to adjust the base cost to the actual Reimbursable Fee. If there are multiple Reimbursable Fees, list each one separately and add a comment in the "note" block to identify the Reimbursable Fee (e.g. sidewalk closure, road cut, various permits, extended warranty, expedited shipping costs, etc.). A copy of each receipt, invoice, or proof of payment shall be submitted with the Price Proposal.	$2,823.16
				Installation	Quantity 2,566.51 x Unit Price 1.00 x Factor 1.1000 = Total 2,823.16	
					Used for the estimated bond if required. Proposal before bond $128,325.42 x 2% = $2,566.51	

Work Order Number: 132670.00
Work Order Title: Belmont Library Exterior Painting

Section - 01

10	01	22	23	00	0029		WK	60' Engine Powered, Articulating (Up/Over) Boom Man Lift With Platform				$14,474.99
								Quantity		Unit Price	Factor	Total
							Installation	6.00	x	1,508.00 x	1.5998 =	14,474.99
								Two articulating man lifts for 3 weeks each for the exterior prep and painting.				
11	01	22	23	00	0062		WK	30' Electric, Scissor Platform Lift				$3,131.80
								Quantity		Unit Price	Factor	Total
							Installation	3.00	x	652.54 x	1.5998 =	3,131.80
								Used to assist in painting stucco walls and ceilings.				
12	01	56	16	00	0002		SF	6 Mil, Plastic Sheeting, Applied To Floors				$1,151.86
								Quantity		Unit Price	Factor	Total
							Installation	2,000.00	x	0.36 x	1.5998 =	1,151.86
								Used to cover equipment, bushes, or any other obstructions in the way during painting. (2) rolls of 100' x 10 - 2000 SF				
13	01	56	16	00	0003		SF	6 Mil, Plastic Sheeting, Applied To Walls				$1,471.82
								Quantity		Unit Price	Factor	Total
							Installation	2,000.00	x	0.46 x	1.5998 =	1,471.82
								Used to cover equipment, windows, or any other obstructions in the way during painting. (2) rolls of 100' x 10 - 2000 SF				
14	01	57	23	00	0003		EA	36" x 48" x 18" Non-Woven Polypropylene Oil and Sediment Drain Guard (Ultra-Drain Guard® 9217)Up to 0.87 gallons oil, up to 40 lbs sediment.				$654.38
								Quantity		Unit Price	Factor	Total
							Installation	4.00	x	102.26 x	1.5998 =	654.38
								Used for protecting drains around the property when spraying the building off.				
15	01	71	13	00	0004		EA	First 25 Miles, Equipment Delivery, Pickup, Mobilization And Demobilization Using A Tractor Trailer With Up To 53' BedIncludes loading, tie-down of equipment, delivery of equipment, off loading on site, rigging, dismantling, loading for return and transporting away. For equipment such as bulldozers, motor scrapers, hydraulic excavators, gradalls, road graders, loader-backhoes, heavy duty construction loaders, tractors, pavers, rollers, bridge finishers, straight mast construction forklifts, telescoping boom rough terrain construction forklifts, telescoping and articulating boom man lifts with >40' boom lengths, etc.				$7,085.55
								Quantity		Unit Price	Factor	Total
							Installation	3.00	x	1,476.34 x	1.5998 =	7,085.55
								Used to deliver and pickup two man reach lift and 1 scissor lift for the exterior painting work.				

Subtotal for Section - 01 **$30,793.56**

Section - 07

16	07	92	13	00	0005		CLF	3/8" x 3/8" Joint, Silicone Sealant And Caulking				$8,382.18
								Quantity		Unit Price	Factor	Total
							Installation	11.00	x	476.32 x	1.5998 =	8,382.18
								Quantity captures multiple passes.				
17	07	92	13	00	0005	0092	MOD	For Custom Match Coloring, Add				$530.40
								Quantity		Unit Price	Factor	Total
							Installation	11.00	x	30.14 x	1.5998 =	530.40

Subtotal for Section - 07 **$8,912.58**

Section - 09

Work Order Number: 132670.00
Work Order Title: Belmont Library Exterior Painting

Section - 09

18	09 01 90 52 0006		SF	Hand Scrape, Concrete And Masonry Surfaces, Surface Preparation									$2,960.27
			Installation		Quantity 2,570.00	x	Unit Price 0.72	x	Factor 1.5998	=	Total 2,960.27		
				Used to prep other than normal damaged areas to prepare for priming and painting. Estimated 20% of 12853 SF = 2570 SF									
19	09 01 90 52 0021		SF	Power Tool Cleaning, Metal Surfaces, Surface Preparation									$1,500.61
			Installation		Quantity 700.00	x	Unit Price 1.34	x	Factor 1.5998	=	Total 1,500.61		
				used to prep all exterior hand rails for paint.									
20	09 01 90 52 0053		SF	2,000 To 5,000 PSI Pressure Wash Plaster/Stucco Surfaces, Surface Preparation									$11,720.47
			Installation		Quantity 12,853.00	x	Unit Price 0.57	x	Factor 1.5998	=	Total 11,720.47		
21	09 01 90 52 0053	0343	MOD	For >10,000 To 15,000, Deduct									-$1,028.11
			Installation		Quantity 12,853.00	x	Unit Price -0.05	x	Factor 1.5998	=	Total -1,028.11		
22	09 91 13 00 0095		SF	1 Coat Primer, Brush/Roller Work, Paint Exterior Stucco Walls									$3,253.13
			Installation		Quantity 1,738.00	x	Unit Price 1.17	x	Factor 1.5998	=	Total 3,253.13		
				Used to prime the exterior stucco ceilings.									
23	09 91 13 00 0097		SF	2 Coats Paint, Brush/Roller Work, Paint Exterior Stucco Walls									$6,784.30
			Installation		Quantity 1,738.00	x	Unit Price 2.44	x	Factor 1.5998	=	Total 6,784.30		
				Used to paint exterior stucco ceilings.									
24	09 91 13 00 0098		SF	1 Coat Primer, Sprayed, Paint Exterior Stucco Walls									$16,655.41
			Installation		Quantity 12,853.00	x	Unit Price 0.81	x	Factor 1.5998	=	Total 16,655.41		
25	09 91 13 00 0100		SF	2 Coats Paint, Sprayed, Paint Exterior Stucco Walls									$38,862.61
			Installation		Quantity 12,853.00	x	Unit Price 1.89	x	Factor 1.5998	=	Total 38,862.61		
26	09 91 13 00 0240		EA	1 Coat Primer, Brush/Roller Work, Paint Exterior Metal DoorOne face									$180.87
			Installation		Quantity 2.00	x	Unit Price 56.53	x	Factor 1.5998	=	Total 180.87		
27	09 91 13 00 0242		EA	2 Coat Paint, Brush/Roller Work, Paint Exterior Metal DoorOne face									$325.14
			Installation		Quantity 2.00	x	Unit Price 101.62	x	Factor 1.5998	=	Total 325.14		
28	09 91 13 00 0372		LF	1 Coat Alkyd Enamel Paint, Brush/Roller Work, 2 Rails, Paint Pipe Rail And Pickets									$993.88
			Installation		Quantity 175.00	x	Unit Price 3.55	x	Factor 1.5998	=	Total 993.88		
29	09 91 13 00 0373		LF	2 Coats Alkyd Enamel Paint, Brush/Roller Work, 2 Rails, Paint Pipe Rail And Pickets									$1,679.79
			Installation		Quantity 175.00	x	Unit Price 6.00	x	Factor 1.5998	=	Total 1,679.79		

Subtotal for Section - 09 **$83,888.37**

Contractor's Price Proposal - Detail Continues..

Work Order Number: 132670.00
Work Order Title: Belmont Library Exterior Painting

Proposal Total **$131,148.58**

This total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding.

Subcontractor Listing

Date: September 05, 2024

Re:

IQC Master Contract #:	CA-R4-GB-101723-STA
Work Order #:	132670.00
Owner PO #:	
Title:	Belmont Library Exterior Painting
Contractor:	Staples Construction Company, Inc.
Proposal Value:	$131,148.58

Name of Contractor	Duties	Amount	%
McLaughlin Painting	Exterior Painting	$98,000.00	74.72

1824-03 Belmont Library Exterior Painting

Detailed Scope of Work

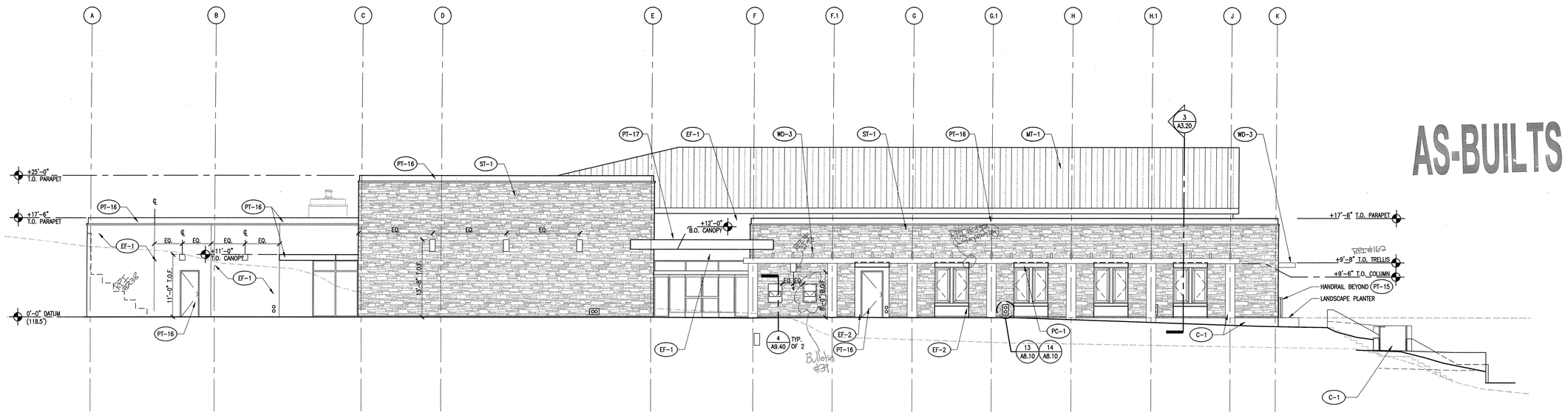
- Prep and paint the complete exterior stucco of the library.
- Prep and paint all the exterior railings
- Prep and Paint two exterior metal doors and frames
- Add Alternate# 1 – Prep and paint the stucco in the mechanical pit.
- Prevailing Wages Included
- 1-Year Workmanship Warranty Included

Clarifications:

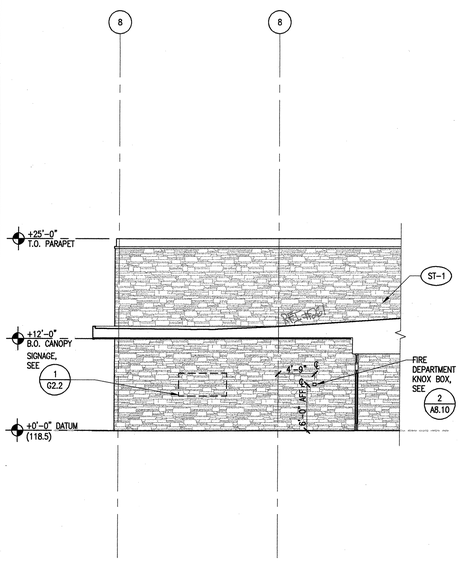
1. It is the owner's responsibility to trim the bushes, so they are at least 3 inches away from the surfaces to be painted, trees 5' away from surfaces to be painted and to provide water and electricity
2. We will use man lifts.
3. Not included: Anodized aluminum windows, vinyl windows, window glazing, cement walkways, roof metal HVAC vents, fixing previous patches, fences or any item not mentioned on above scope.
4. All the Kynar Coated Flashings and exterior light fixtures are excluded.

EXTERIOR MATERIALS & FINISHES	
CODE	MATERIAL OR FINISH
AL–#	ALUMINUM WINDOW WALL/DOOR FACTORY FINISH COLOR
C–#	CONCRETE
EF–#	ELASTOMERIC FINISH, COLOR #
FF–#	FACTORY FINISH
MT–#	METAL FINISH
PC–#	PRE–CAST CONCRETE
PT–#	EXTERIOR PAINT
ST–#	STONE, COLOR AND TEXTURE #
WD–#	WOOD TYPE

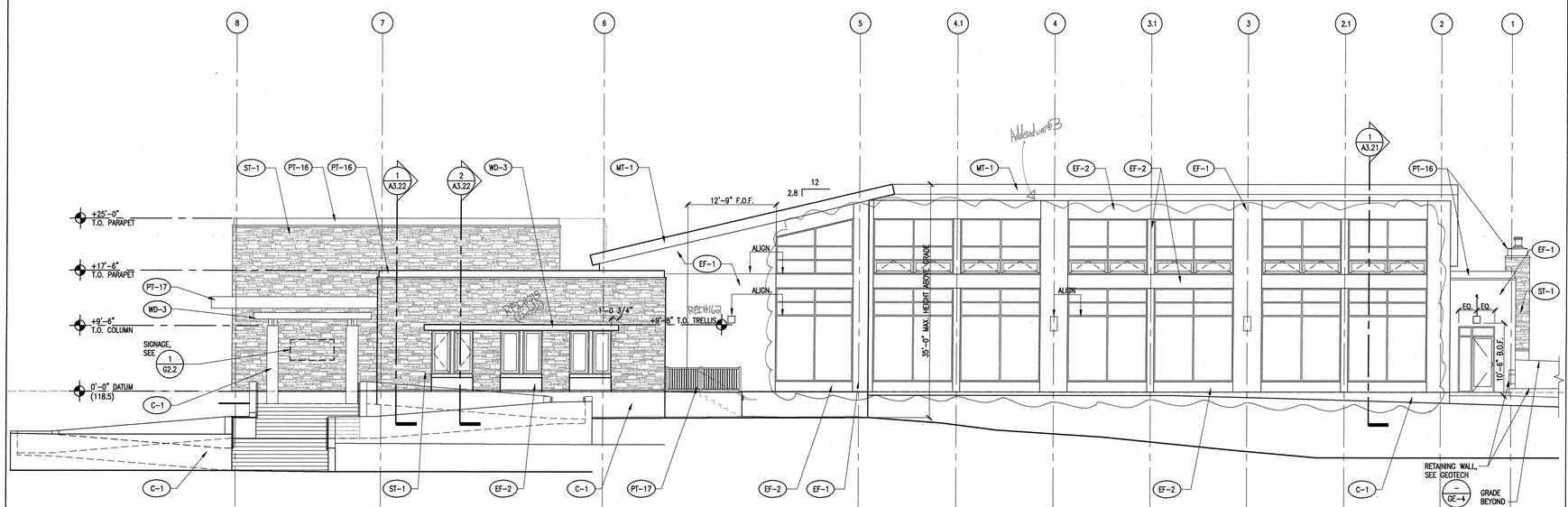
NOTE: SEE SPECIFICATIONS FOR DESCRIPTION OF MATERIALS & FINISHES.



SOUTH ELEVATION
EL.dwg
0 1 4 8 16 24 FEET
2 A3.1



EAST ELEVATION @ ENTRY
EL-Entry-E.dwg
3 A3.1



EAST ELEVATION
EL.dwg
0 1 4 8 16 24 FEET
1 A3.1

FIELD PAOLI

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7th Floor
San Francisco
California 94111
Tel. 415. 788. 6606
Fax 415. 788. 6650

BELMONT LIBRARY AND BELAMEDA PARK

CITY OF BELMONT

1110 ALAMEDA DE LAS PULGAS
BELMONT, CA 94002

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smcl.org

LICENSED ARCHITECT MARK SCHATZ NO. C 13308 REN. STATE OF CALIFORNIA

DATE	OCTOBER 18, 2004
	PHASE 2 - BID SET
REVISIONS	

EXTERIOR ELEVATIONS

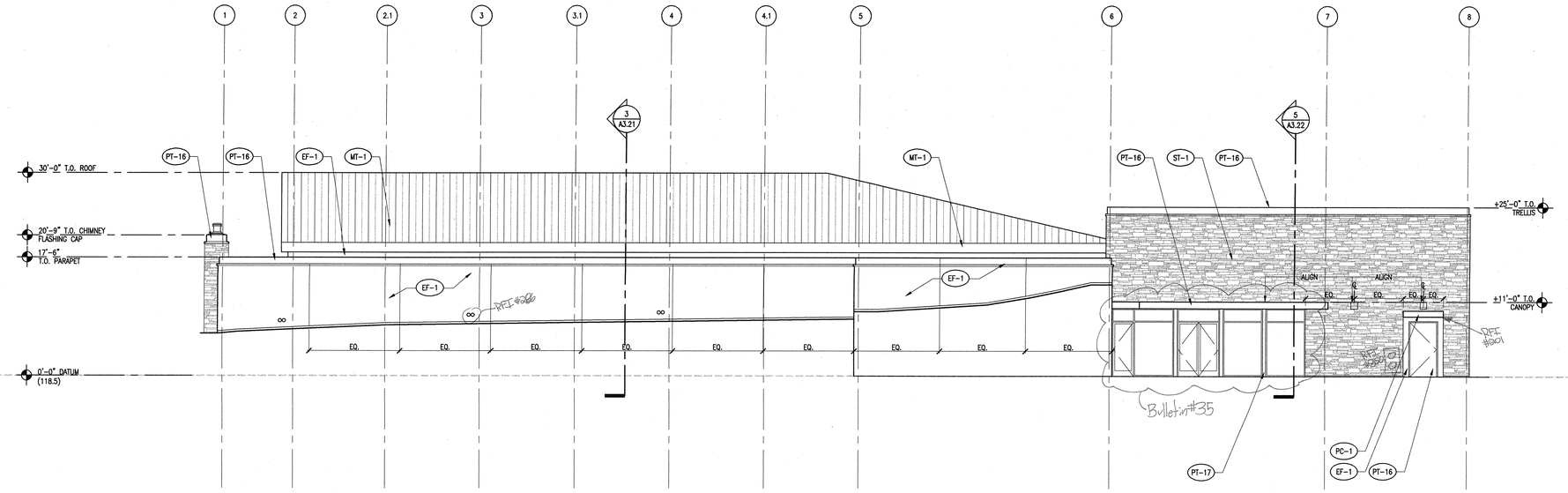
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DRAWN BY	KP
CHECKED BY	DS/RL
JOB NO.	0318

SHEET NO. **A3.1**

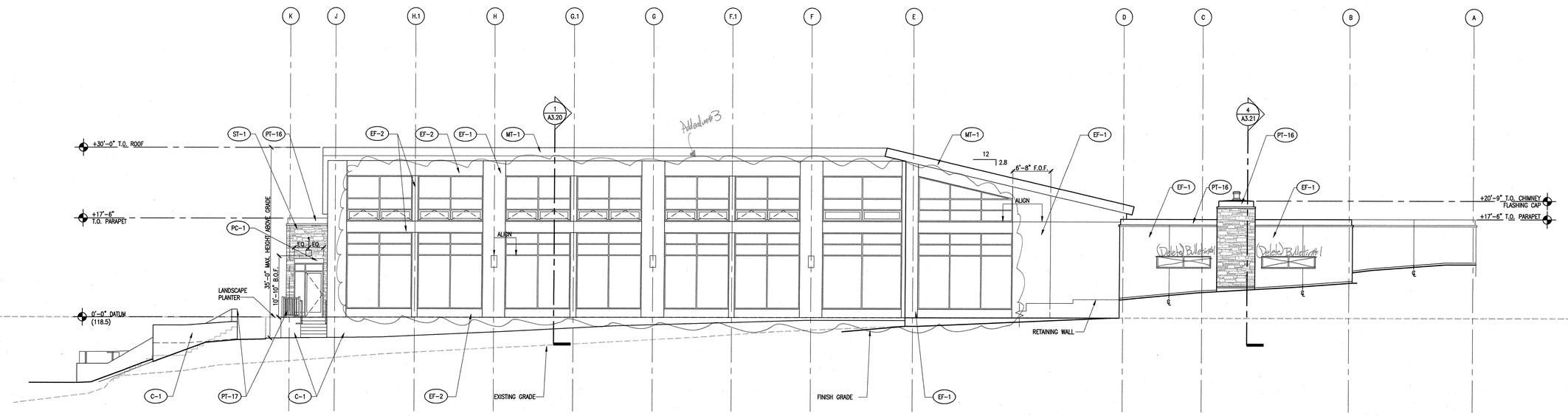
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EXTERIOR MATERIALS & FINISHES	
CODE	MATERIAL OR FINISH
AL–#	ALUMINUM WINDOW WALL/DOOR FACTORY FINISH COLOR
C–#	CONCRETE
EF–#	ELASTOMERIC FINISH, COLOR #
FF–#	FACTORY FINISH
MT–#	METAL FINISH
PC–#	PRE–CAST CONCRETE
PT–#	EXTERIOR PAINT
ST–#	STONE, COLOR AND TEXTURE #
WD–#	WOOD TYPE

NOTE: SEE SPECIFICATIONS FOR DESCRIPTION OF MATERIALS & FINISHES.



WEST ELEVATION
EL.dwg
0 1 4 8 16 24 FEET
2 A3.2



NORTH ELEVATION
EL.dwg
0 1 4 8 16 24 FEET
1 A3.2

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Fax 415. 788. 6650

BELMONT LIBRARY AND BELAMEDA PARK

CITY OF BELMONT

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BELMONT, CA 94002

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LICENSED ARCHITECT MARK SCHATZ NO. C 13308 REN. _____ STATE OF CALIFORNIA

DATE	OCTOBER 18, 2004
	PHASE 2 - BID SET
REVISIONS	

AS-BUILTS

EXTERIOR ELEVATIONS

SCALE	1/8"=1'-0"
DRAWN BY	KP
CHECKED BY	DS/RL
JOB NO.	0318

SHEET NO. **A3.2**

All drawings and written material appearing herein constitute the original and unpublished work of the architect and the same may not be duplicated, used, or disclosed without the written consent of the architect ©Field Paoli

IFB #CA-101723
Invitation for Bids
for
Indefinite Delivery-Indefinite Quantity
Construction Contracts
in the
State of California

Bid Due Date: October 17, 2023, 4:30 p.m., Central Time

Sourcewell, a State of Minnesota local government entity and public agency, is issuing this Invitation for Bids (IFB) on behalf of its participating entities to create indefinite delivery-indefinite quantity construction (IDIQ) contracts that may be used by those participating entities for projects related to construction or the repair, alteration, modernization, or renovation of buildings, structures, or other real property.

This IFB consists of the following parts:

1. Invitation for Bids, including Map of Regions
2. Template IDIQ Construction Contract
3. IDIQ Contract General Terms and Conditions
4. Construction Task Catalog
5. Technical Specifications

A full copy of the IFB can be found on the Sourcewell Procurement Portal (https://proportal.sourcewell-mn.gov), and only bids submitted through the Sourcewell Procurement Portal will be considered. Bids are due no later than October 17, 2023, at 4:30 p.m. Central Time, and late bids will not be considered.

Solicitation Schedule

Notice of Solicitation Published:	September 12, 2023
Pre-bid Conference:	September 26, 2023, 12:00 p.m., Central Time
Question Submission Deadline:	October 10, 2023, 4:30 p.m., Central Time
Bid Due Date:	October 17, 2023, 4:30 p.m., Central Time Late responses will not be considered.
Opening:	October 17, 2023, 6:30 p.m., Central Time See Article VII. G. for more information.

I. ABOUT SOURCEWELL AND ITS PARTICIPATING ENTITIES

Sourcewell is a State of Minnesota local government and public agency created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its participating entities across the United States. It has the authority to develop and offer, among other services, joint purchasing services to its participating entities. Sourcewell's solicitation process complies with State of Minnesota law and policies.

Sourcewell's participating entities in the State of California may include:

- Federal and state government
- Cities, towns, and counties/parishes
- Education service cooperatives
- K-12 and higher education
- Tribal government
- Some nonprofit
- Other public entities

II. INDEFINITE DELIVERY-INDEFINITE QUANTITY CONSTRUCTION PROGRAM

Sourcewell is soliciting bids for its IDIQ construction program. IDIQ contracting offers participating entities access to competitively solicited and awarded contracts for projects related to construction or the repair, alteration, modernization, or renovation of buildings, structures, or other real property.

Sourcewell has engaged The Gordian Group, Inc. (Gordian) to provide management of its IDIQ construction program. In this role, Gordian provides support to Sourcewell in the administration of the program, including: preparing Construction Task Catalogs and related technical specifications, providing information management systems and licenses to contractors, training to contractors, administering fee collection, consulting services to Sourcewell, and assisting with proposal package or work order development. Participating Entities access Sourcewell IDIQ contracts resulting from this IFB through relevant purchasing authority, and work directly with Contractors awarded through this IFB.

Under IDIQ, an awarded Contractor furnishes management, labor, materials, equipment, and incidental design support needed to perform the work. Details of the program's operation can be found within the Contract, and General Terms and Conditions document included in this IFB.

III. REQUIRED BIDDER QUALIFICATIONS

In determining a Bidder's responsibility and ability to perform under a Contract, Sourcewell has the right to investigate and request information concerning the financial condition, experience record, personnel, equipment, facilities, business location(s) and organization of the Bidder, the Bidder's record with environmental regulations, and the claims and litigation history of the Bidder. Sourcewell reserves the right to verify the Bidder's information and may request clarification from a Bidder.

A. A Bidder's business must be normally engaged in performing the type of work specified within this IFB and must have adequate organization, facilities, equipment, and personnel to ensure prompt and efficient service to a Sourcewell participating entity (as solely determined by Sourcewell).

B. Bidders responding to a General Building solicitation must be willing and capable of providing all or a majority of the various types of construction work as specified in the Construction Task Catalog either through its own forces or by using subcontractors. Bidder must provide documentation of all applicable required licensure(s).

C. Bidders responding to **Paving, Roofing/Waterproofing, Plumbing, Sanitation System, Flooring, Abatement Services, Landscaping, Painting, Low Voltage Systems, Fire Protection, Mechanical/HVAC, Electrical, Solar, and/or Limited Specialty Contracts (C-61)** solicitations must perform at least **51%** of all contracted work with its own organization and forces. The percentage calculation does not include field superintendents or office management personnel.

D. Bidders must demonstrate a physical presence within the geographic boundary of the region(s), or adjacent region(s) to which they are bidding as identified in the Map of Sourcewell Contract Regions.

IV. BID OVERVIEW AND PREPARATION INSTRUCTIONS

A. REQUESTED INDEFINITE DELIVERY-INDEFINITE QUANTITY CONSTRUCTION SERVICES. The IDIQ services specified include General Building, Paving, Roofing/Waterproofing, Plumbing, Sanitation System, Flooring, Abatement Services, Landscaping, Painting, Low Voltage Systems, Fire Protection, Mechanical/HVAC, Electrical, Solar, and Limited Specialty Contracts. At this time, no specific projects have been identified; work and work volume from any resulting contract are not guaranteed. Specific description of work and summary of duties for each category of construction can be found in the Technical Specifications.

B. PREPARATION INSTRUCTIONS. Strict compliance with the following instructions is required for properly preparing a bid. Before submitting a bid, it is the responsibility of each Bidder to:

1) Examine the IFB Documents thoroughly;
2) Consider all applicable federal, state and local laws, regulations, ordinances, and procurement codes that may affect costs, progress, performance, or furnishing of a participating entity's work; and,
3) Notify Sourcewell of all conflicts, errors, or discrepancies in the IFB Documents of which Bidder knows.

The submission of a Bid constitutes a representation by the Bidder to Sourcewell that it has complied with the above requirements and that, without exception, its Bid is premised upon performing and furnishing the Work required by this IFB.

Bidders should include all relevant information in its bid. Sourcewell cannot consider information that is not provided in the bid.

C. ESTIMATED CONTRACT VALUE AND USAGE. Based on past volume of similar contracts, the estimated annual value of each contract resulting from this IFB is $5,797,275. Sourcewell anticipates considerable activity under the contract(s) awarded from this IFB; however, work and work volume from any resulting contract are not guaranteed.

V. BID PRICING

A. CONSTRUCTION TASK CATALOG AND ADJUSTMENT FACTOR. In order to evaluate bid pricing and the retain consistency within contract pricing, Sourcewell uses Gordian's proprietary Construction Task Catalog (CTC). The CTC as a comprehensive listing of specific repair and construction related Tasks, together with a specific unit of measurement and a pre-set unit price (Unit Price). All Unit Prices within the CTC are based on local labor, material, and equipment prices for the direct cost of construction.

Under this IFB, Bidders will offer price adjustments (Adjustment Factors) that will be applied to CTC Unit Prices. The Adjustment Factors represent either an increase to the present Unit Prices (such as 1.1000) or a decrease from the preset Unit Prices (such as 0.9800).

A participating entity's cost for a specific task will be determined by multiplying the preset Unit Prices by the appropriate quantities and by the appropriate Adjustment Factor (e.g., specific task cost = preset unit price in CTC * quantity needed * Adjustment Factor).

1) Each Bidder must submit 3 Adjustment Factors to be applied to every task in the CTC. The bid must be either an adjustment "decrease from" (e.g. 0.9800) or "increase to" (e.g. 1.1000) the Unit Prices listed in the CTC.
2) The Bidder's Adjustment Factors must include all of the Bidder's direct and indirect costs. This includes, but is not limited to, its costs for overhead, profit, bond premiums above the reimbursable amount, insurance, mobilization, purchase order proposal development, and all contingencies in connection therewith. See pages 00t-1 – 00-6 of the CTC for a complete explanation of what is and is not included in the Unit Prices. Note, where applicable, the bidder must comply with all applicable prevailing wage laws. The wage rates in the CTC were current at the time these IFB Documents were issued.
    a. *The first Adjustment Factor* will be applied to work to be accomplished during Normal Working Hours and are performed on projects that **do require** prevailing wage rates.
    b. *The second Adjustment Factor* will be applied to work to be accomplished during Other Than Normal Working Hours and are performed on projects that **do require** prevailing wage rates.
    c. *The third Adjustment Factor* will be applied to work to be accomplished at secured facilities/OSHPD that **do require** prevailing wage rates.
    d. *The fourth Adjustment Factor* will be applied to work to be accomplished on all union wage projects.
    e. *The fifth Adjustment Factor* will be for work tasks not identified in the Construction Task Catalog. IQCC includes a provision for establishing of prices for Work requirements which are within the general scope of IQCC but were not included in the CTC at the time of Contract award. These Tasks are referred to as "Non Pre-priced Tasks (NPP)." NPP Tasks may require new specifications and drawings and may subsequently be incorporated into the CTC. The bidders will offer an Adjustment Factor to be applied to the actual material, equipment, and labor cost for NPP work Tasks.
3) Adjustment Factors may be specified to the fourth decimal place. For example:

1	**.**	**1**	**0**	**0**	**0**

Or

0	**.**	**9**	**8**	**0**	**0**

4) For bid evaluation purposes only, the following weighing of the Adjustment factors will be used to determine the Combined Adjustment Factor. Complete the following information within the Sourcewell Procurement Portal:

Adjustment Factors	Weight
Normal Working Hours – Prevailing Wage Rate Projects	50%
Other Than Normal Working Hours – Prevailing Wage Rate Projects	15%
Secured/OSHPD Prevailing Wage Rate Projects	15%
All Union Wage Projects	10%
Non-Pre-Priced Adjustment Factor	10%

B. ADMINISTRATIVE FEES. Awarded contractors must pay an administrative fee in exchange for the administration of the contracts by Sourcewell and Sourcewell's contract administrator, Gordian. The bidder must include the administrative fee in calculating the Contractor's Adjustment Factors.

Detailed information about Sourcewell's administrative fee can be found in Article VII. B of the General Terms and Conditions.

VI. CONTRACT

Bidders awarded a contract will be required to execute the Contract (including its General Terms and Conditions) attached to this IFB.

VII. BIDDING PROCESS

A. PRE-BID CONFERENCE. Sourcewell will hold a non-mandatory pre-bid conference via webcast on the date and time noted in the Solicitation Schedule and on the Sourcewell Procurement Portal. The purpose of this conference is to allow potential bidders to ask questions regarding this IFB. Information about the webcast will be sent to all entities that have registered for this solicitation opportunity through their Sourcewell Procurement Portal Vendor Account. Pre-bid conference attendance is optional but highly encouraged.

B. QUESTIONS REGARDING THIS IFB AND ORAL COMMUNICATION. Any questions regarding this IFB must be submitted through the Sourcewell Procurement Portal. The deadline for submission of questions is found in the Solicitation Schedule and on the Sourcewell Procurement Portal. Answers to questions will be issued through an addendum to this IFB. Repetitive questions will be summarized into a single answer and identifying information will be removed from the submitted questions.

All questions, whether specific to a Bidder or generally related to the IFB, must be submitted using this process. Do not contact individual Sourcewell staff (or any representative of Gordian) to ask questions or request information as this may disqualify the Bidder from responding to this IFB. Sourcewell will not respond to questions submitted after the deadline.

C. ADDENDA. Sourcewell may modify this IFB; however, no Addenda will be issued later than 5 days prior to the Bid Due Date, except an Addendum that withdraws or postpones this IFB. Addenda issued by Sourcewell become a part of the IFB and will be delivered to potential Bidders through the Sourcewell Procurement Portal. Sourcewell accepts no liability in connection with the delivery of any addenda.

Before a bid will be accepted through the Sourcewell Procurement Portal, all addenda, if any, must be acknowledged by the Bidder by checking the box for each addendum. It is the responsibility of the Bidder to check for any addenda that may have been issued up to the solicitation due date and time.

If an addendum is issued after a Bidder submitted its Bid, the Sourcewell Procurement Portal will WITHDRAW the submission and change the Bidder's Bid status to INCOMPLETE. The Bidder can view this status change in the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account. The Bidder is solely responsible to check the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account periodically after submitting its Bid (and up to the Bid due date). If the Bidder's Bid status has changed to INCOMPLETE, the Bidder is solely responsible to:

1) make any required adjustments to its bid,
2) acknowledge the addenda, and
3) ensure the re-submitted bid is received through the Sourcewell Procurement Portal no later than the Bid Due Date and time shown in the Solicitation Schedule above.

D. BID SUBMISSION. Bidder's complete bid must be submitted through the Sourcewell Procurement Portal no later than the date and time specified in the Solicitation Schedule and on the Sourcewell Procurement Portal. Any other form of bid submission, whether electronic, paper, or otherwise, will not be considered by Sourcewell. Late bids will not be considered. It is the Bidder's sole responsibility to ensure that the bid is received on time. To ensure receipt of the latest information and updates via email regarding this solicitation, or if the Bidder has obtained this IFB from a third party, the onus is on the Bidder to create a Sourcewell Procurement Portal Vendor Account and register for this solicitation opportunity.

Within the Procurement Portal, all bids must be digitally acknowledged by an authorized representative of the Bidder attesting that the information contained in in the bid is true and accurate. By submitting a bid, Bidder warrants that the information provided is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate, misleading, or false information is grounds for disqualification from a contract award and may subject the Bidder to remedies available by law.

It is recommended that Bidders allow sufficient time to upload the bid and to resolve any issues that may arise. The time and date that a bid is received by Sourcewell is solely determined by the Sourcewell Procurement Portal web clock. In the event of problems with the Sourcewell Procurement Portal, follow the instructions for technical support posted in the portal. It may take up to 24 hours to respond to certain issues.

Upon successful submission of a bid, the Portal will automatically generate a confirmation email to the Bidder. If the Bidder does not receive a confirmation email, contact Sourcewell's support provider at support@bidsandtenders.ca.

E. GENERAL BID REQUIREMENTS. Bids must be:

- In substantial compliance with the requirements of this IFB or it will be considered nonresponsive and be rejected
- Complete–a bid will be rejected if it is conditional or incomplete
- Submitted in English
- Valid and irrevocable for 180 days following the Bid Due Date

Any and all costs incurred in responding to this IFB will be borne by the Bidder.

F. BID MODIFICATION WITHDRAWAL. A submitted bid may not be modified, withdrawn, or cancelled by the Bidder for a period of 180 calendar days following the time and date designated for the receipt of bids. Prior to the deadline for submission of bids, any bid submitted may be modified or withdrawn through the Sourcewell Procurement Portal.

G. OPENING. The Opening of Bids will be conducted electronically through the Sourcewell Procurement Portal. A list of all Bidders will be made publicly available in the Sourcewell Procurement Portal after the Bid Due Date, but no later than the Opening time listed in the Solicitation Schedule.

To view the list of Bidders, verify that the Sourcewell Procurement Portal opportunities list search is set to "All" or "Closed." The solicitation status will automatically change to "Closed" after the Bid Due Date and Time.

VIII. EVALUATION AND AWARD

A. EVALUATION. Only responsive bids will be evaluated. A responsive bid must have been submitted on time and materially satisfy all mandatory requirements identified in this IFB. Deviations or exceptions stipulated in Bidder's response, while possibly necessary in the view of the Bidder, may result in disqualification.

B. AWARD(S). It is the intent of Sourcewell to award each Contract to the lowest, responsive, responsible Bidder(s) based on the Combined Adjustment Factor as calculated by Sourcewell within each Region.

C. CONTRACT TERM. The term of the resulting contract(s) awarded by Sourcewell under this solicitation will be one year. Sourcewell and Contractor may agree to up to five additional one-year extensions. Sourcewell retains the right to consider additional extensions beyond six years as required under exceptional circumstances.

A Bidder will not be awarded more than one same scope Contract within any Region. The maximum number of contracts to be initially awarded for each geographic region and contract type are reflected in the tables below:

Region 1:	
General Building	2 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Paving	2 Contracts

Region 2:	
General Building	2 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Paving	2 Contracts

Region 3:	
General Building	2 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Paving	2 Contracts

Region 4:	
General Building	6 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Paving	2 Contracts

Region 5:	
General Building	6 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Paving	2 Contracts

Region 6:	
General Building	6 Contracts
Electrical	2 Contracts

Mechanical/HVAC	2 Contracts
Paving	2 Contracts
Roofing/Waterproofing	2 Contracts

Region 7:	
General Building	6 Contracts
Electrical	4 Contracts
Mechanical/HVAC	4 Contracts
Paving	4 Contracts
Roofing/Waterproofing	4 Contracts
Flooring	4 Contracts
Abatement Services	4 Contracts
Landscaping	2 Contracts
Painting	2 Contracts

Region 8:	
General Building	20 Contracts
Electrical	6 Contracts
Mechanical/HVAC	6 Contracts
Paving	6 Contracts
Roofing/Waterproofing	6 Contracts
Flooring	4 Contracts
Abatement Services	4 Contracts
Painting	4 Contracts
Low Voltage Systems	4 Contracts
Fire Protection	2 Contracts
Plumbing	4 Contracts
Sanitation Systems	4 Contracts
Limited Specialty Contracts (C-61)	6 Contracts

Region 9:	
General Building	8 Contracts

Electrical	4 Contracts
Mechanical/HVAC	4 Contracts
Paving	4 Contracts
Roofing/Waterproofing	4 Contracts
Flooring	4 Contracts
Abatement Services	4 Contracts
Painting	2 Contracts
Plumbing	4 Contracts
Landscaping	2 Contracts
Solar	2 Contracts

Region 10:	
General Building	4 Contracts
Electrical	2 Contracts
Mechanical/HVAC	2 Contracts
Painting	2 Contracts
Roofing/Waterproofing	2 Contracts

Sourcewell reserves the right to award additional contracts from this solicitation, above the stated maximum number, if it is determined to be in the best interests of Sourcewell and participating entities, for a period of 180 Days (or longer, if mutually agreeable to both the bidder and Sourcewell).

Sourcewell retains the right to waive any informality in a Bidder's response. Sourcewell reserves the right to reject all bids and advertise again if, in Sourcewell's opinion, the bids received do not meet or exceed the minimum needs and expectations of Sourcewell and its participating entities.

Competitive Range. If Sourcewell receives a wide margin of bid Adjustment Factors, either too high or too low, then the Sourcewell Bid evaluation committee may establish a Competitive Range for the IFB. If it is determined that a Bidder's Combined Adjustment Factor is too far outside the Competitive Range, then the Bidder can be removed from consideration. The Bidder will be notified that it was determined to be outside the Competitive Range after award of the contracts.

Unbalanced Bid. A Bid may be removed from consideration if it is determined that the Bidder has mathematically unbalanced its Bid to gain a competitive advantage. The Bid will be considered to be unbalanced if any Adjustment Factor is found to not cover the contractor's reasonable actual cost. Those costs would include a reasonable prorated share of its anticipated profit, overhead cost, and other indirect costs that the bidder anticipates for the performance of the work as determined by the Sourcewell Bid Review Committee.

Other Than Normal Working Hours Adjustment Factors. A Bidder's Other Than Normal Working Hours Adjustment Factors must be higher or equal to its Normal Working Hours Adjustment Factors.

IX. ASSIGNMENT OF WORK

See the Contract, and General Terms and Conditions for a detailed description of how work will be assigned.

X. PROTESTS OF AWARDS

Any protest made under this IFB by a Bidder must be in writing, addressed to Sourcewell's Executive Director, and delivered to the Sourcewell office located at 202 12th Street NE, P.O. Box 219, Staples, MN 56479. All documents that comprise the complete protest package must be received no later than 10 calendar days following Sourcewell's notice of contract award(s) or non-award and must be time stamped by Sourcewell no later than 4:30 p.m., Central Time.

A protest must allege a procedural or technical defect, with supporting documentation. A request for re-evaluation of a bid's content will not be entertained.

A protest must include the following items:

- The name, address, and telephone number of the protester
- The original signature of the protester or its representative
- Identification of the solicitation by IFB number
- A precise statement of the relevant facts
- Identification of the alleged breakdown in procedure or technical issues
- Identification of the legal or factual basis
- Any additional supporting documentation
- Protest bond in the amount of $20,000, except where prohibited by law or treaty

Protests that do not address these elements will not be reviewed.

XI. RIGHTS RESERVED

This IFB does not commit Sourcewell to award any contract, and a bid may be rejected if it is nonresponsive, conditional, incomplete, conflicting, or misleading. Bids that contain false statements or do not support an attribute or condition stated by the Bidder may be rejected.

Sourcewell reserves the right to:

- Modify or cancel this IFB at any time
- Reject any and all bids received
- Reject bids that do not comply with the provisions of this IFB
- Independently verify any information provided in a Bid
- Disqualify any Bidder that does not meet the requirements of this IFB, is debarred or suspended by the United States or Canada, State of Minnesota, participating entity's state; has an officer, or other key personnel, who have been charged with a serious crime; or is bankrupt, insolvent, or where bankruptcy or insolvency are a reasonable prospect;
- Waive or modify any informalities, irregularities, or inconsistencies in the bids received
- Clarify any part of a bid

- Award a contract if only one responsive bid is received if it is in the best interest of participating entities
- Award a contract to one or more Bidders if it is in the best interest of participating entities

XII. DISPOSITION OF BIDS

All materials submitted in response to this IFB will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591. It is the Bidder's responsibility to clearly identify any data submitted that it considers to be protected. Bidder must also include a justification for the classification citing the applicable Minnesota law.

Sourcewell will not consider the prices submitted by the Bidder to be confidential, proprietary, or trade secret materials. Financial information, including financial statements, provided by a Bidder is not considered trade secret under the statutory definition.

The Bidder understands that Sourcewell will reject bids that are marked confidential nonpublic, either substantially or in their entirety.

[Map of Regions to Follow]

MAP OF
SOURCEWELL CONTRACT
REGIONS
Solicitation #CA-101723



Region 1		
Colusa	Humboldt	Tehama
Del Norte	Lake	Trinity
Glenn	Mendocino	

Region 2		
Butte	Plumas	Sierra
Lassen	Shasta	Siskiyou
Modac		

Region 3		
El Dorado	Placer	Sutter
Nevada	Sacramento	Yuba

Region 4		
Contra Costa	Napa	Sonoma
Marin	Solano	Yolo

Region 5		
Fresno	Merced	Stanislaus
Kings	San Joaquin	Tulare
Madera		

Region 6		
Alameda	San Francisco	Santa Clara
Monterey	San Mateo	Santa Cruz
San Benito		

Region 7		
Kern	Santa Barbara	Ventura
San Luis Obispo		

Region 8		
Los Angeles	Riverside	San Bernardino
Orange		

Region 9		
Imperial	San Diego	

Region 10		
Alpine	Inyo	Mono
Amador	Mariposa	Tuolumne
Calaveras		

09/13/2023

Addendum No. 1
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Updated San Diego Housing Commission Provisions, Terms and Conditions, Forms, have been uploaded to the document section of the bid details page. The document originally posted for this IFB as a .ZIP file entitled “San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms” has been removed and the updated Provisions, Terms and Conditions, and Forms have been uploaded to the Sourcewell Procurement Portal. Please download the .ZIP folder again, now entitled “Updated_ San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms” to ensure you have the correct documents.

The following listed original files has been removed from the IFB:
San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms

The following listed files have been inserted in the IFB and are found in the revised .ZIP file:
Updated_ San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms

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End of Addendum

Acknowledgement of this Addendum to IFB CA-101723 posted to the Sourcewell Procurement Portal on 09/13/2023, is required at the time of proposal submittal.

09/13/2023

Addendum No. 2
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

CTC specs for region 4,6,7,8 appear to be damaged files and are unable to be opened. Can new files please be uploaded?

Answer 1:

An error in downloading the files contained in ZIP folder IFB_CA-101723_CTC(s),_Contract_Template,_Technical_Specifications,_Terms_and_Conditions has been identified.

The folder posted to the documents section for this IFB entitled "IFB_CA-101723_CTC(s),_Contract_Template,_Technical_Specifications,_Terms_and_Conditions.zip" has been updated with new CTC's for Region's 4, 5, 6, and 7. Please redownload the folder to access these new CTC documents.

End of Addendum

Acknowledgement of this Addendum to IFB CA-101723 posted to the Sourcewell Procurement Portal on 09/13/2023, is required at the time of proposal submittal.

09/19/2023

Addendum No. 3
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Can past awarded adjustment factors be provided?

Answer 1:

Contract documentation, including the bid tabulation, for past solicitations is maintained on the Sourcewell website. For examples of current Sourcewell-awarded IDIQ contracts, navigate to the page on the Sourcewell website at the following address: https://www.sourcewell-mn.gov/cooperative-purchasing-eziqc/search.

Question 2:

The ZIP folder titled "Updated_San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms" cannot be opened, the error states that the path is too long. Is it possible to shorten the name of the file so it can be opened?

Answer 2:

An error in downloading the files contained in ZIP folder "Updated_San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms" has been identified.

The file name under the heading "Updated_San_Diego_Housing_Commission_Provisions,_Terms_and_Conditions,_Forms" has been shortened and can now be opened. Download this file to access the documents.

Question 3:

We have reviewed the IFB documents but do not find any bid submission documents? Are the bid documents going to be released at a later date?

Answer 3:

All solicitation documents have been uploaded to the Sourcewell Procurement Portal. All bids must be submitted through the Sourcewell Procurement Portal.

End of Addendum

Acknowledgement of this Addendum to IFB #CA-101723 posted to the Sourcewell Procurement Portal on 09/19/2023, is required at the time of proposal submittal.

09/25/2023

Addendum No. 4
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Due to a technical error, Table 1: Bidder Identity, was omitted. This table has now been added to the Sourcewell Procurement Portal.

Question 1:

I am unclear on the bonding requirement necessary for this bid. What are the bonding requirements to submit a bid to this solicitation? Do we present our current bonding capability, and then Sourcewell determines if it is sufficient for the contract?
Or is there a given level of bonding capability that we need to show?

Answer 1:

The bonding requirement to submit a bid for this solicitation is to simply provide a current letter from your bonding company stating what your capacity is. It is up to you and the bonding company to determine how best to present this information, but typically a single and aggregate total is provided.

On a per project basis, additional bonds may be required by the Participating Entity. Refer to General Terms and Conditions, specifically article IV, L, Bonds: Payment and Performance or Material and Workmanship.

End of Addendum

Acknowledgement of this Addendum to IFB #CA-101723 posted to the Sourcewell Procurement Portal on 09/25/2023, is required at the time of proposal submittal.

09/29/2023

Addendum No. 5
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

If a Parent Company has multiple trade subsidiaries with separate tax identification numbers and business licenses, should they submit as the Parent Company listing the subsidiary groups and ID numbers? Should the subsidiaries all submit separately?

Answer 1:

A Parent Company may demonstrate its willingness and capability of providing all or a majority of the work as specified in the Construction Task Catalog through subcontracts with its subsidiary companies.

Article III, Part C requires Bidders responding to the trade-specific contract opportunities listed in the IFB to perform at least 51% of the contracted work through its own forces. If any Bidder for a trade-specific contract opportunity cannot itself complete at least 51% of the contracted work, the Bidder may be deemed nonresponsive.

Article IV, Part B states a Bid is a representation of the Bidder that "its Bid is premised upon performing and furnishing the Work required by this IFB." If a Bidder is not able to perform or furnish the Work as demonstrated through the requirements of Article III, the Bidder may be deemed nonresponsive.

Bidders should ensure it is responsive to the requirements as defined in Article III based upon the type of contract opportunity for which it intends to Bid.

Question 2:

What is the local office requirement?

Answer 2:

Refer to IFB Article III, D. “Bidders must demonstrate a physical presence within the geographic boundary of the region(s), or adjacent region(s) to which they are bidding as identified in the Map of Sourcewell Contract Regions.”

Question 3:

The general contractor is to provide adjustment factors for self-performed tasks. Do we provide adjustment factors for subcontracted work as well?

Answer 3:

The general contractor will provide an adjustment factor to cover all tasks in the Construction Task Catalog. The adjustment factor includes work that may be self-performed or completed by a subcontractor.

Question 4:

Will as-built drawings be required in a specific format? i.e. CAD, Revit, Acrobat, basic hand drawn?

Answer 4:

The necessity and format of as-built drawings will be determined on a project-by-project basis and determined during the Joint Scope Meeting.

Question 5:

Regarding construction trailers, if the contractor does not need a trailer, but the owner is stating they want one for the project, then we use the catalog to add the trailer to the proposal? Does the catalog include power, furniture, etc.?

Answer 5:

If the owner is requiring an on-site construction trailer, then costs for the trailer, equipment, furniture, power can be pulled out of line items from the CTC. Determinations on this are often made during the Joint Scope Meeting.

Question 6:

We have a headquarter office in Los Angeles County and have a branch trailer office in Santa Barbara County. Can we use that trailer office address and bid the contract for Region 7?

Answer 6:

Refer to question two of this addendum and IFB Article III, D.

Question 7:

Is there an estimated number of bidders that you're expecting?

Answer 7:

No.

End of Addendum

Acknowledgement of this Addendum to IFB #CA-101723 posted to the Sourcewell Procurement Portal on 09/29/2023, is required at the time of proposal submittal.

10/02/2023

Addendum No. 6
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Can you please clarify if the bid opening on 10/17 is virtual and open for bidders to attend?

Answer 1:

Refer to Article V, Part G of the IFB also noted below for reference.

> *OPENING. The Opening of Bids will be conducted electronically through the Sourcewell Procurement Portal. A list of all Bidders will be made publicly available in the Sourcewell Procurement Portal after the Bid Due Date, but no later than the Opening time listed in the Solicitation Schedule.*

Question 2:

What is the procedure for bidding on multiple contract opportunities within a region? For example there are 20 General Building contracts available in Region 8. To bid all 20 contracts do you change the factor for each contract and submit?

Answer 2:

You will only enter one set of adjustment factors for each trade per region being bid. The same adjustment factors are used for all the same trade opportunities. For example, there are 20 contract opportunities available for General Building in Region 8 and you will use one adjustment factor for all. The 20 lowest bids based on combined adjustment factors will receive a contract.

End of Addendum

Acknowledgement of this Addendum to IFB #CA-101723 posted to the Sourcewell Procurement Portal on 10/02/2023, is required at the time of proposal submittal.

10/11/2023

Addendum No. 7
Solicitation Number: IFB #CA-101723
Solicitation Name: Indefinite Delivery-Indefinite Quantity Construction - California

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

Question 1:

Is there a self performance requirement for bidders responding to a General Building solicitation?

Answer 1:

Refer to IFB Article III, Part B. “Bidders responding to a General Building solicitation must be willing and capable of providing all or a majority of the various types of construction work as specified in the Construction Task Catalog either through its own forces or by using subcontractors. Bidder must provide documentation of all applicable required licensure(s).”

Question 2:

For Table 3: Office Address(s), is the Contractor required to have a fully operating office in each region that its submitting the bids for? For example, would a physical office address of a Contractor's headquarter in Los Angeles County be suitable to submit for a bid for Region 9 (San Diego, Imperial)?

Answer 2:

Refer to IFB Article III, Part D. Each bidder must have a physical presence in or adjacent to each region to which they are submitting a bid. In the example, Los Angeles County is in Region 8 which is adjacent to Region 9 on the Map of Sourcewell Contract Regions making the office location in Los Angeles County suitable to bid in Region 9.

Question 3:

Can a contractor make a request to see a sample bid package?

Answer 3:

Contract documentation, including the bid tabulation, for past solicitations is maintained on the Sourcewell website. For examples of current Sourcewell-awarded IDIQ contracts, navigate to the page on the Sourcewell website at the following address: https://www.sourcewell-mn.gov/cooperative-purchasing-eziqc/search.

End of Addendum

Acknowledgement of this Addendum to IFB #CA-101723 posted to the Sourcewell Procurement Portal on 10/11/2023, is required at the time of proposal submittal.

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Indefinite Delivery-Indefinite Quantity Construction Contract

Contract Number: CA-R4-GB-101723-STA

Service Type: General Building

This Indefinite Delivery-Indefinite Quantity Construction Contract (Contract) is between **Sourcewell**, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 and **Staples Construction, 1501 Eastman Ave., Ventura, CA 93003** (Contractor).

Sourcewell is a State of Minnesota local government agency and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that offers cooperative procurement solutions to government entities. Participation is open to federal, state and municipal governmental entities, K-12 and higher education entities, nonprofit entities, tribal governments, and other public entities located within the United States.

The Contractor desires to contract with Sourcewell to provide construction services to entities that access Sourcewell's indefinite delivery-indefinite quantity (IDIQ) construction contracts within the Service Region.

I. TERM OF CONTRACT

A. EFFECTIVE DATE. This Contract, including the General Terms and Conditions incorporated by reference, is effective upon the later of December 6, 2023 or the date of the final signature below.

B. EXPIRATION DATE AND EXTENSION. This Contract expires **December 5, 2024**, unless it is terminated sooner pursuant to Article XX of the General Terms and Conditions, which are incorporated into this Contract by reference. This Contract allows up to five additional one-year extensions upon the request of Sourcewell and written agreement with Contractor. Sourcewell retains the right to consider additional extensions beyond six years as required under exceptional circumstances.

II. REGION AND SERVICES

The Contractor's Region is: Region 4. The Contractor's IDIQ construction service type is: General Building. The Contractor **has** agreed to perform work outside the Region.

III. ADJUSTMENT FACTORS

The Contractor will perform any or all Tasks in the Construction Task Catalog for the Unit Price appearing therein multiplied by the following Adjustment Factors. See the General Terms and Conditions for additional information.

A. **Normal Working Hours – Prevailing Wage Rate Projects**: Work performed from 7:00 a.m. until 4:00 p.m. Monday to Friday, except Holidays. The Contractor will perform Tasks during Normal Working Hours for the Unit Price set forth in the CTC multiplied by the Adjustment Factor of: 1.5998.

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B. **Other Than Normal Working Hours – Prevailing Wage Rate Projects**: Work performed from 4:00 p.m. to 7:00 a.m. Monday to Friday, and any time Saturday, Sunday and Holidays. The Contractor will perform Tasks during Other Than Normal Working Hours for the Unit Price set forth in the CTC multiplied by the Adjustment Factor of: 1.6498.

C. **Secured Facilities/OSHPD Prevailing - Wage Rate Projects**: Work performed from 7:00 a.m. until 4:00 p.m. Monday to Friday, except Holidays. The Contractor will perform Tasks during Normal Working Hours for the Unit Price set forth in the CTC multiplied by the Adjustment Factor of: 1.6498.

D. **All Union Wage Projects**: Work performed from 7:00 a.m. until 4:00 p.m. Monday to Friday, except Holidays. The Contractor will perform Tasks during Normal Working Hours for the Unit Price set forth in the CTC multiplied by the Adjustment Factor of: 1.6498.

E. **Non pre-priced Adjustment Factor**: To be applied to Work determined not to be included in the CTC but within the general scope of the work: 1.3998.

VI. AUTHORIZED REPRESENTATIVE

A. Sourcewell's Authorized Representative is its Chief Procurement Officer.

B. The Contractor's Authorized Representative is David Staples. If the Contractor's Authorized Representative changes at any time during this Contract, Contractor must promptly notify Sourcewell in writing.

Sourcewell

DocuSigned by:
By: Jeremy Schwartz
C0FD2A139D06489...

Jeremy Schwartz

Title: Chief Procurement Officer

Date: 12/6/2023 | 11:56 AM CST

Staples Construction

DocuSigned by:
By: DAVID STAPLES
DE61DE24B2E0412...

David Staples

Title: President

Date: 12/6/2023 | 9:54 AM PST

GENERAL CONDITIONS

CITY OF BELMONT
CITY CONTRACT NUMBER 2024-632, 2024-633
LIBRARY EXTERIOR PAINTING (632)
LIBRARY INTERIOR PAINTING AND FLOORING REPLACEMENT (633)

G.C. 1 STANDARD SPECIFICATIONS

The Standard Specifications for Public Works Construction "Greenbook" (latest edition) in conjunction with The State of California Department of Transportation Standard Specifications "Caltrans Standard Specifications" (latest edition) shall be the referenced standard specifications for this contract. All work shall conform to the aforementioned standard specifications, including General Conditions, Special Provisions and Technical Specifications, unless otherwise specified in the Contract Documents.

G.C. 2 DEFINITIONS

"City of Belmont," the "Contractor," and the "Contract Documents" are identified in the Standard Contract Agreement. The "City of Belmont" and the "Contractor" include their authorized representatives and are treated throughout as if each were singular in number and neuter in gender. "Contractor" includes its surety. Whenever in the Standard Specifications and Contract Documents the following terms are used, they shall be understood to mean and refer to the following:

A. Agency/City The City of Belmont, California

B. Engineer The Director of Public Works and his authorized representatives.

G.C. 3 ENGINEER

The Engineer shall act as the City's representative during the construction period. He shall determine the amount, quality, acceptability and fitness of parts of the work and interpret the Contract Documents. The Engineer will make visits to the site and determine if the work is proceeding in accordance with the Contract Documents. No act or omission of the Engineer shall relieve the Contractor of the duty to proceed with the work in strict conformity with the Contract Documents.

At least one week prior to the start of work, the Contractor shall furnish to the Engineer a Schedule of Work showing the Contractor's planned sequence of operations. Such schedule shall

be subject to the review and approval of the Engineer. No work shall be done until the Contractor and the Engineer have agreed to the schedule to be followed by the Contractor.

Upon request, the Engineer shall reduce to writing any oral order, objection requirement or determination. All communications to the City by the Contractor shall be via the Engineer. Whenever the Engineer's approval is requested, it shall be in writing only.

In accordance with Belmont's Construction Noise Ordinance, no work shall be performed on site other than during normal working hours of 8 am to 5 pm, Monday through Friday. No work that interferes with public traffic shall be performed on Ralston Avenue and Alameda de las Pulgas before 9:00 a.m. nor after 3:00 p.m., Monday through Friday, unless authorized by the Engineer.

The Contractor shall hand deliver written notification to the Engineer prior to any emergency overtime, weekend or holiday. The sum of the City Inspector's pay for inspection of overtime weekend or holiday work performed will be deducted from any moneys due to the Contractor. Overtime is defined as work in excess of 8 hours in a day. The Contractor, and not the Engineer, shall be responsible for the construction means, controls, techniques, sequences, procedures and construction safety.

As stated elsewhere, amounts shown in the Proposal and Contract as to quantities are estimates only. From time to time, the Engineer shall direct the Contractor as to the prosecution of the work in such manner as to increase or decrease such estimates as to the work actually to be done. The Contractor shall comply with such instructions and shall be paid only for work actually done based on the unit prices set out in the Contract.

G.C. 4 AWARD AND EXECUTION OF CONTRACT

The right is reserved to reject any bids if the Engineer is not satisfied that the bidder is fully qualified to carry out the terms of the Contract.

G.C. 5 PROTECTION

At his expense the Contractor shall:

A. Protect all utilities from damage and not disturb such utilities without approval of the governing agency. Contact Underground Service Alert (USA) at 1-800-227-2600 at least 48 hours prior to commencing excavations.

B. Work with the respective utility companies to assure proper reconnection and relocation of such services. The Contractor is expected to include the cost of working with these utility companies in the price bid for the work involved.

C. Take every precaution against injuries to persons or damage to property.

D. Comply with regulations governing the use of the property. The Contractor shall furnish the City with a copy of written permission from the property owner to the Contractor prior to using private property for any storage of materials, equipment or debris.

E. Store and suitably protect its apparatus, equipment, materials, and supplies in an orderly fashion on site.

F. Place on the work only such loads as are consistent with the safety of the work.

G. Effect all cutting, fitting, or patching or its work required to make it conform to the Plans and Specifications and interrelated with other improvements but, except with the consent of the Engineer, shall not cut or otherwise alter existing improvements.

H. Protect and preserve established benchmarks and monuments, make no changes in the location of such without the prior written approval of the City, and replace and relocate any which may be lost or destroyed or which require shifting because of necessary changes in grades or locations. All replacement and relocation work shall be accomplished only after approval of the City and under the direct supervision and instructions of the Engineer.

I. Before final payment, remove all surplus material, false work, temporary structures, debris, and similar matter resulting from its operation from the site and put the site in an orderly condition.

J. Construct, operate and maintain all passageways, guard fences, lights, barricades and other facilities required for protection by state or municipal laws and regulations and local conditions during the course of the work.

K. Guard the City's property from injury or loss.

L. Take all reasonable precautions for dust and noise control and generally conduct operations so as not to constitute a nuisance.

M. Protect existing signs, fences, asphalt pavement, concrete curb, and gutter and other highway facilities which may be encountered in the roadway. The replacement or repair of any facilities which the City deems necessary as a result of the Contractor's operations shall be done by the Contractor at its own expense and to the satisfaction of the City.

G.C. 6 VALUE ENGINEERING

The City is receptive to proposals from the Contractor identifying ways to reduce project costs and will share 50% of the cost savings with the Contractor if the proposal is accepted. The City encourages the Contractor to submit cost saving proposals on construction methods, products or materials that are equal to, or better than, what is specified by the project plans or specifications. The City is not obligated to accept and implement the proposal; however, if the City does accept the proposal for implementation, the City will share 50% of the cost savings with the Contractor. The cost savings shall be limited to the project for which the proposal is made. The City retains the right to implement the Contractor's proposal on future projects without obligation to sharing the future cost savings. The cost saving/value engineering program is administered by the City in accordance with California Public Contract Code Section 7101.

G.C. 7 CHANGES IN THE WORK

The City shall have the right to make any reasonable changes in the project plans or quantities determined to be necessary or expedient. In case such changes increase or diminish the work shown, the Contractor shall be paid for the work actually done at a mutually agree upon adjustment to the Contract price, based upon the accepted Bid Proposal or according to the provisions of Paragraph 7, Changes in Work. The Contractor shall not be entitled to extra payment, nor shall any claim be made on account of anticipated profits on the work that may be omitted.

G.C. 8 CHANGES IN CONTRACT PRICES

Whenever corrections, alterations, or modifications of the work under this Contract are ordered by the Engineer and increase the amount of work to be done, such added work shall be known as extra work; and when such corrections, alterations, or modifications decrease the amount of work to be done, such subtracted work shall be known as work omitted.

The difference in cost of the work affected by such change will be added to or deducted from the amount of said Contract price, as the case may be, by a fair and reasonable valuation, which shall be determined in one or more of the following ways:

a. By agreed lump sum
b. By agreed unit prices
c. By Force Account

If neither a nor b methods can be agreed upon and the Contractor receives written order to make such changes, the Contractor shall be compensated by Force Account for his actual necessary costs, including labor, material, and equipment rental, as determined by the Engineer, plus a negotiated fixed fee for profit and such overhead items as home and branch office expenses, general expenses, general superintendence, indirect labor, and licenses. The negotiated fixed fee shall not exceed fifteen percent (15%) of actual necessary direct costs.

In addition to the actual cost of labor, the amount due the Contractor shall include the cost of compensation insurance, contributions made to the State as required by the provisions of the Unemployment Reserve Act, Chapter 352, Statutes of 1935, as amended; and for taxes paid the Federal Government, as required by the Social Security Act, approved August 14, 1935, as amended to date, plus other payments the Contractor must make to, or on behalf of, the workers.

For use of equipment owned by the Contractor, the rental rates therefore shall be based upon the current prices prevailing in the locality, not to exceed the rates promulgated by the California (State) Department of Transportation in effect at the time the work was performed.

It is understood that labor, materials, and equipment may be furnished by the Contractor, or by the subcontractor, or by others on behalf of the Contractor. When the work is performed by other than the Contractor's organization, the Contractor shall reach an agreement with such other forces as to the distribution of payments made for such, and no additional payment therefore will be made by the City.

When Force Account work is performed by a bona fide and approved subcontractor, the negotiated fixed fee markup is limited to ten percent (10%) for the subcontractor, and five

percent (5%) for the prime Contractor, on the performing subcontractor's actual costs, and no markup will be allowed for any intermediary subcontractor between the performing subcontractor and the prime Contractor.

All labor furnished on Force Account work shall be adjusted daily upon report sheets, furnished by the Contractor and signed by both parties, which daily report sheets hall thereafter by considered the true record of Force Account labor provided.

In order that a proper estimate may be made by the Engineer of the net cost of labor and materials entered into Force Account work, in accordance with the procedure hereinbefore stated, the Contractor shall furnish weekly an itemized statement of materials and labor supplied together with the cost of such material and the wages paid, and shall furnish vouchers for quantities and prices of such labor, material, or work. In case the Contractor fails to comply with the above provisions, he shall have no claim for compensation against the City.

City reserves the right to contract with any person or firm other than the Contractor for any or all extra work. The Contractor's attention is especially called to the fact that he shall be entitled to no claim for damages for anticipated profits on any portions of work that may be awarded to others.

When the Contractor considers that any changes ordered involve extra work that the Engineer has not recognized as such, he shall immediately notify the Engineer in writing as to when and where alleged extra work is to be performed. If the Engineer directs by written order that the alleged extra work be performed, the Contractor shall comply, and shall make claim for compensation therefore each month not later than the 20th day of the month during which the work claimed to be extra work was performed, and he shall submit a weekly complete statement of materials used and expenses incurred on account of extra work performed, showing allocation of all materials and expenses. All such claims shall state the date of the Engineer's written order.

Unless such notification is made in writing and unless complete statements of materials used and expenses incurred on account of such alleged extra work are furnished as above required, the Contractor shall not be entitled to consideration for payment for alleged extra work, and any future claims for compensation for such alleged extra work shall be invalidated.

G.C. 9 BRAND OR TRADE NAME - SUBSTITUTE OF EQUALS

Reference is made in Section 3400 of the California Public Contracts Code, which is by this reference incorporated herein with like effect as if here set forth in full.

If a potential bidder believes he knows of an equal to a specified brand or trade name which is not mentioned in the Contract Documents, then such potential bidder may so advise the Engineer of such fact, giving all relevant information. If appropriate, an Addendum will be issued as to the alleged equal provided that such issuance may be accomplished at least 5 days before the time fixed for opening bids.

Unless the subject article or product is expressly designated for matching others in use in a particular public improvement either completed or in the course of completion, any bidder may, as part of its bid proposal, include a request for substitution of an item equal to any specified

brand or trade name. At the preconstruction meeting, the Contractor may submit to the Engineer data substantiating such a request, and the difference, if any, in cost. The Engineer shall promptly investigate the request and make a recommendation to the City as to equality.

The City shall promptly determine where the substitute is equal in every respect to the item specified, and approve or deny the request accordingly, and shall notify the Engineer of the determination made, who shall advise the Contractor in writing of the decision. Unless the request is granted, substitution will not be permitted. In accordance with Section 3400 of the California Public Contracts Code, the Contractor shall be provided a period of not less than 35 days after the award of contract for submission of data substantiating a request for a substitution of "an equal" item.

Nothing herein shall authorize a change in the Contract price or prevent the use of change order in the manner provided elsewhere in the Contract Documents.

G.C. 10 FINAL INSPECTION, ACCEPTANCE AND NOTICE OF COMPLETION

Upon written notice from the Contractor that the entire work required by the Contract Documents is complete and that all submittals required by him are made, and after the Contractor has delivered the bonds, certificates of inspection, proof of insurance, guarantees, warranties, releases, and other documents, all as required by the Contract Documents or by law, a post construction conference will be held to review the work and resolve any unsettled matters. Present at the conference shall be the Engineer, the Inspector, the Contractor, and the Contractor's Superintendent. Following this conference, Engineer will make a final inspection, the Contractor, and the City will notify the Contractor in writing of any deficiencies in the submittals and other documents required of him. The Contractor promptly shall make such corrections as are necessary to remedy all defects or deficiencies. After the Contract has completed any such corrections to the satisfaction of the City, the City will issue a written final acceptance of the work and file any notice of completion required by law or otherwise.

Final Inspection will be in two phases: a semi-final inspection by the Construction Inspector and the Contractor; and a final inspection, including representatives of the City, the Contractor, and any State or County agency. At the conclusion of the semi-final inspection, the Construction Inspector will provide the Contractor, in writing, a "punch list" of items requiring completion of remedial work. The Contractor shall rectify all matters on the "punch list" before making his formal request, in writing, for Final Inspection. Upon completion of the final inspection, if further completion or remedial work is determined to be necessary, the Engineer shall transmit to the Contractor a final list of items for remedial attention. After final inspection, the City Council will adopt a resolution determining that the contract work, or designated phases thereof, is substantially complete and is accepted.

G.C. 11 GUARANTEE AND WARRANTY OF WORK

The Contractor shall submit all products and materials to be used to the Engineer for approval. The Contractor shall provide a list of submittals at the pre-construction conference.

Notwithstanding inspections and acceptance by the City of work furnished under this contract, the Contractor warrants to the City that all materials and equipment furnished under the contract, including that provided pursuant to change orders, will be of good quality and new, that the work will be free from defects in material or workmanship and that the work will conform to the requirements of the Contract Documents. Work not conforming to these requirements, including substitutions not properly approved and authorized, may be considered defective.

This warranty by the Contractor is in addition to any warranties or guarantees required by the special provisions or technical specifications for specified items of equipment or materials. This warranty shall be in effect notwithstanding any disclaimers, or limiting or conditional terms contained such separate warranties furnished by manufacturers or suppliers.

If, within one year after the date of final acceptance of the work by the City, any of the work is found not to be in accordance with the Contract Documents the Contractor shall correct it promptly after written notice from the City to do so, and pay for any damage to other property resulting from such non-conforming work. If the Contractor fails to make the repairs or replacements promptly, or in any emergency when delay could cause risk or damage or loss, the City may have the non-conforming work removed, replaced or corrected at the expense of the Contractor and his surety. If the amount of the performance bond is insufficient to cover such work, the Contractor shall be liable to pay any such deficiency on demand by the City. Non-conforming work which is remedied under this Section shall be subject to an extended warranty obligation for a period of one year after the non-conforming work has been remedied.

All workmanship performed, and materials/equipment installed, as part of this contract shall be guaranteed for a period of one year, commencing upon issuance of the Notice of Completion for the work under this contract.

G.C. 12 CITY'S RIGHT TO STOP WORK OR TERMINATE THE CONTRACT

The City, without prejudice to such other right, remedy or relief it may be entitled to, may by giving ten (10) days notice to the Contractor, terminate the employment of the Contractor and it his right to proceed, if:

A. The Contractor shall be adjudged bankrupt or make an assignment for the benefit of creditors.

B. A receiver or liquidator is appointed for the Contractor or any of its property.

C. The Contractor shall refuse or fail after Notice of Warning from the City by the Engineer to supply sufficient properly skilled workmen or suitable materials.

D. The Contractor fails to prosecute the work with such diligence as will insure its completion within the stipulated time period.

E. The Contractor shall fail to make payments to persons supplying labor or materials for the work.

F. The Contractor does not comply with applicable law or instructions of the Engineer.

G. The Contractor is otherwise guilty of a substantial violation of any provision of the Contract Documents.

If the City determines that the Contractor has failed to perform any of its obligations under the Standard Contract Agreement or to otherwise comply with the Standard Contract Agreement, then, in addition to all other remedies provided by law, City may terminate the Standard Contract Agreement immediately upon written notice to the Contractor provided, however, that if the City's determination of the Contractor's failure to perform under or comply with the Standard Contract Agreement can be cured by Contractor within thirty (30) days from the date that City discovers Contractor's failure to perform or comply, then the City may provide Contractor with a notice of Contractor's failure to perform or comply and provide Contractor with a definite period of time, to be specified in the notice and not to exceed a maximum period of thirty (30) days from the date of the notice, to cure. Failure to perform or comply to City's satisfaction within the definite time period specified in the notice are grounds for termination by City.

The City Manager is empowered to terminate the Standard Contract Agreement and issue the notices provided for in this Section on behalf of City. In the event of termination, the Contractor shall immediately cease all work being performed under the Standard Contract Agreement. Termination of the Standard Contract Agreement by City shall constitute the withdrawal of any consent or authorization of City for Contractor to perform any construction or other work under the Standard Contract Agreement in the public right-of-way or on public property, excepting only that work necessary to leave all work site areas in a clean and safe condition.

The City's right to terminate may be for the entire work, or at the City's option, as to any portion thereof as to which delay shall have occurred or breach or miscompliance related, and may thereupon take possession of the entire work or portion thereof. In such case, the Contractor shall not be entitled to receive any further payment until the work is finished. If the unpaid balance shall exceed the expense of completion, and other damage, expense or loss of the City occasioned by the Contractor's failure to properly perform, the Contractor shall pay such excess. If such expense and damage exceeds the unpaid balance, the Contractor is liable to the City for the excess. If the City elects to proceed under this Section, it may take possession of and utilize in completing the work such materials, supplies, pain and equipment on site which may be necessary or convenient for the purpose of completing the work. The City is expressly granted the right, acting via an Engineer or otherwise, to operate equipment and machinery on site for the purpose of determining whether it has a basis for proceeding under this Section.

G.C. 13 PAYMENT AND MONTHLY ESTIMATES

1. Schedules, Reports and Records As stated in Section 9-2 of the Standard Specification for Public Works Construction "Greenbook" (latest edition), the Contractor is required to submit to the Engineer for approval, a schedule of values for bid items. Lump Sum bid items are to be broken out into appropriate segments to create the schedule. This is to be integrated with the project work schedule and submittal schedule. These schedules will be used in the evaluation of Contractor Progress Payment Requests to the City.

2. Pay Period On or immediately after the first day of each month, the Contractor is to submit to the Engineer a "Request For Progress Payment." This request is to be for work performed and for materials on the site up to and including the last day of the month. The Request For Progress Payment is to be submitted on a "Payment Application and Certificate" form (CP-14).

3. Retentions Pursuant to Section 9-3.2 of the Specifications, 5 percent of each month's amount earned by the Contractor will be retained by the City until 50 percent of the contract work is completed. At that point, at the Engineer's discretion, if work is proceeding satisfactorily, retention may be discontinued except for the amount previously retained. Pursuant to Section 9-3.2 of the Standard Specification for Public Works Construction "Greenbook" (latest edition), the Contractor may elect to place sufficient acceptable securities with the City or in an escrow account, in lieu of the Engineer's retention of the funds. Earnings from such an escrow account shall accrue to the benefit of the Contractor. All procedures and documentation shall be as provided by State Law.

4. Preparation and Processing of Monthly Progress Payment Requests Each monthly progress payment shall be submitted on a copy of the form "Payment Application and Certificate" (CP-14). It shall be prepared and certified by the Contractor and submitted to the Engineer, on or immediately following the last day of the month. It shall include the Contractor's itemization, prepared in a format approved by the Engineer and including the approved schedule of values. The "Payment Application and Certificate" (Form CP-14) shall be signed by an authorized representative of the Contractor.

Preparation of the request for progress payment should be preceded by consultation between the Contractor and the Engineer to determine acceptable percentages of completion for items in the Schedule of Values for which work has been performed. The extension of the total amount due per Schedule Item should agree with the percentage of completion. This may necessitate expressing the percentage figure to four decimal places.

Pursuant to Section 9-3.3 of the Specifications, requests for payments for materials on the site shall be accompanied by invoices, bills of sale, delivery tickets or other documentation that establishes the City's title and the value of materials for which payment is requested.

Requests for payment of Change Orders authorized by the City shall be accompanied by signed daily work orders for labor, equipment and materials if performed on a time and material basis. These are to be submitted on "Cost of Work Record" forms (CP-18).

The Engineer will review the request, check all mathematical entries, percentages and extension, and when satisfactory, will transmit the Form CP-14 to the Director of Public Works with recommendation for payment. Upon approval, the Engineer will submit, the progress payment request to the City's Finance Department for payment to the contractor. Payment will then be issued to the Contractor by the City, with retention of a portion of the funds by the City, as indicated above. If a retention securities escrow account has been established, the City will make 100% payment of the approved monthly progress payment.

Upon satisfactory completion of the Contract work, and official acceptance by the City, the retained amount will be paid to the Contractor by City, or the City will authorize the release of impounded securities to the Contractor, all subject to the provisions of Section 9-3.1 of the Specifications.

G.C. 14 FAILURE TO COMPLETE THE WORK IN THE TIME AGREED UPON

It is agreed by the parties to the Contract that time is of the essence; and that in the case all the work is not completed before or upon the expiration of the time limit set forth, damage will be sustained by the City and it is, therefore, agreed that the Contractor will pay to the City as damages the amount of the actual damage as determined, due to the failure to complete the work in the time agreed upon. In addition, the City shall have the right to charge to the Contractor and to deduct from payments for the work the actual cost to the City of engineering, inspection, superintendence, and other overhead expenses, which are directly chargeable to the contract and which accrue during the period of such delay, except that the cost of final surveys and preparation of the final estimate shall not be included in such charges. The expenses and damages described above shall be deducted from any money due the Contractor under this contract; the Contractor and his sureties shall be liable for any such excess cost.

The Contractor shall not be deemed in breach of its contract and no forfeiture due to delay shall be made because of any delays in the completion of the work due to unforeseeable causes beyond the control and without the fault or negligence of the Contract, provided the Contractor requests an extension of time in accordance with the procedures set forth in Section 6-6 of the Standard Specification for Public Works Construction "Greenbook" (latest edition). Unforeseeable causes of delay beyond the control of Contractor shall include acts of God, acts of a public enemy, acts of the government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, and weather, or delays caused by failure of the City or the owner of a utility to provide for removal or relocation of existing utility. Failure of the Contractor, its agent, servants, employees, officers, subcontractors, directors, or of any party contracting to perform part or all of the work or to supply any equipment or materials shall not be excusable delays. Excusable delays (those beyond Contractor's control) shall not entitle the Contractor to any additional compensation. The sole remedy of the Contractor shall be to seek an extension of time.

G.C. 15 FINAL ACCEPTANCE, RECORDING AND PAYMENT

Upon satisfactory completion of the contractor work or designated phase thereof, and receipt, by the City, of required releases and the "Contractor's Certificate of Release and Request for Final Payment" (CP-20), the acceptance process is as follows:

1. The Engineer recommends to the City Manager and the City Council that the contract work, or designated phase thereof, is substantially complete and ready for acceptance by the City.
2. The City Council adopts a resolution determining that the contract work, or designated phases thereof, is substantially complete and is accepted. The resolution directs the City Clerk to do the following:
   (a) Issue a "Notice of Substantial Completion" (Form CP-21) to the Contractor.
   (b) File with the County Recorder of the County of San Mateo a "Notice of Completion of Contract" (Form CP-22). Filing not to occur until after certification by the Engineer to the City Clerk that all required "punchlist" items have been satisfactorily remedied by the Contractor. On the date established in the "Notice of Completion" the Contractor's

required one-year warranty period will commence, and the City will assume operational responsibility for the completed facilities.

3. Upon issuance of the "Notice of Substantial Completion" to the Contractor, the City will make final payment to the Contractor of the amount remaining after deducting all prior payments and deducting all amounts to be kept or retained by City under the provisions of the contract documents.
4. If all "punch list" items have been satisfactorily remedied, then within ten days of the City Council adoption of the resolution determining the contract work, or designated phase thereof, completed and accepted, the City Clerk will file with the County Recorder the "Notice of Completion of Contract." If a "punchlist" of remedial work remains to be performed by Contractor, then provisions of Section 2.b, above, shall govern as to the time of filing the "Notice of Completion of Contract."
5. A period of thirty-five (35) calendar days will elapse from the date of filing of the "Notice of Completion of Contract" with the County Recorder before the final payments of retained amounts will be made to the contractor.
6. If no stop notices are received by the City within the stated 35-day filing period, the City will issue final payment of retained amounts for the contract work, or designated phase thereof, to the contractor. If any stop notice is received by the City within the 35-day waiting period, it will be referred to the City's legal counsel and final payment of retained amounts will be deferred or adjusted in accordance with advice of legal counsel, until such stop notice matter has been satisfactorily resolved.

G.C. 16 RESOLUTION OF DISPUTES

The City of Belmont incorporates the provisions of Chapter 1414 of the State Public Contract Code (A.B. No. 4165) as part of its plan and specifications for the resolution of construction claims through arbitration. A summary of its provisions are included in the modification to the Standard Specifications which the Contractor is directed to read. The Contractor is also directed to review the entire Statute, Chapter 1414, Section 20207.4 and Section 20104 of the Public Contract Code.

The City's records setting forth the fair and reasonable cost of repairing, replacing, rebuilding or reasonable cost of repairing, replacing, rebuilding or restoring any damage or defects when performed by one other than the Contractor shall be binding and conclusive as to the amount thereof upon the Contractor.

G.C. 16.1 CONTRACT INTERPRETATION BY THE ENGINEER

Questions regarding the meaning and intent of the Contract Documents shall be referred in writing by the Contractor to the Engineer. The Engineer will respond to the Contractor in writing with a decision.

G.C. 16.2 CLAIMS

G.C. 16.2.1 NOTICE

If the Contractor disagrees with the Engineer's decision in G.C.16.1, Contract Interpretation by the Engineer, or in any case, where the Contractor deems additional compensation or a time extension to the contract period is due him for work or materials not covered in the contract or which the Engineer has not recognized as extra work, the Contractor shall notify the Engineer, in writing, of his intention to make claim. Claims pertaining to decisions provided in G.C.16.1 shall be filed in writing to the Engineer within five (5) days of receipt of such decision. All other claims notices for extra work shall be filed in writing to the Engineer prior to the commencement of such work. Written notice shall use the words "Notice of Potential Claim." Such Notice of Potential Claim shall state the circumstances and the reasons for the claim, but need not state the amount.

Additionally, no claim for additional compensation or extension of time for a delay will be considered unless provisions of G.C.7, Changes in the Work; G.C.8, Changes in Contract Prices; and G.C.25, Termination of Contract by Contractor of these General Conditions, are complied with. No claim filed after the date of final payment will be considered.

It is agreed that unless notice is properly given, the Contractor shall not recover costs incurred by him as a result of the alleged extra work, changed work or other situation which had proper notice been given would have given rise to a right for additional compensation. The Contractor should understand that timely notice of potential claim is of great importance to the City, and is not merely a formality. Such notice allows the City to consider preventative action, to monitor the Contractor's increased costs resulting from the situation, to marshall facts, and to plan its affairs. Such notice by the Contractor, and the fact that the Engineer has kept account of the cost as aforesaid, shall not in any way be construed as proving the validity of the claim.

G.C. 16.2.2 SUBMISSION OF CLAIM COSTS

Within thirty (30) days after the last cost of work for which the Contractor contends additional compensation is due, but if costs are incurred over a span of more than 30 days, then within fifteen (15) days after the thirtieth day and every month thereafter, the Contractor shall submit to the Engineer the costs incurred for the claimed matter. Claims shall be made in itemized detail satisfactory to the Engineer in content, detail and format of presentation. If the additional costs are in any respect not knowable with certainty, they shall be estimated. If the claim is found to be just, it shall be allowed and paid for as provided in G.C.7, Changes in the Work.

G.C. 16.2.3 CLAIM MEETINGS

From time to time the Engineer may call special meetings to discuss outstanding claims. The Contractor shall cooperate and attend, prepared to discuss outstanding claims, making available the personnel necessary for claim resolution, and providing documents reasonably requested by the Engineer.

G.C. 16.3 RESOLUTION OF CLAIMS

For all contracts awarded during the effective dates of Public Contract Code Section 20104, where claims cannot be resolved between the parties, claims for three hundred and seventy-five thousand ($375,000) or less shall be resolved pursuant to the provisions of that code section, which is summarized in G.C.16.3.1 and 16.3.4 are applicable; however, G.C.16.3.5, Civil Action for claims less than $375,000 is not applicable.

G.C. 16.3.1 CLAIMS LESS THAN $50,000

1. For claims of less than fifty thousand dollars ($50,000), the Engineer shall respond in writing to written claims within 45 days of receipt of the claim in G.C.16.2, Claims, or may request, in writing, within 30 days of receipt of the claim, any additional documentation supporting the claim or relating to defenses or claims the City may have against the Contractor.
2. If additional information is thereafter required, it shall be requested and provided pursuant to this section, upon mutual agreement of the City and the Contractor.
3. The Engineer's written response to the claim, as further documents, shall be submitted to the Contractor within 15 days after receipt of the further documentation or within a period of time no greater than that taken by the Contractor in producing the additional information, whichever is greater.

G.C. 16.3.2 CLAIMS GREATER THAN $50,000

1. For claims of over fifty thousand dollars ($50,000), the Engineer shall respond in writing to all written claims within 60 days of receipt of the claim in G.C.16.2, Claims, or may request, in writing, within 30 days of receipt of claim, any additional documentation supporting the claim or relating to defenses or claims the City may have against the Contractor.
2. If additional information is thereafter required, it shall be requested and provided pursuant to this paragraph, upon mutual agreement of the City and the Contractor.
3. The Engineer's written response to the claim, as further documented, shall be submitted to the Contractor within 30 days after receipt of the further documentation, or within a period of time no greater than that taken by the Contractor in producing the additional information or requested documentation, whichever is greater.

G.C. 16.3.3 CLAIM CONFERENCE

If the Contractor disputes the Engineer's written response, or if the Engineer fails to respond within the time prescribed, the Contractor may so notify the City, in writing, either within 15 days of receipt of the Engineer's response or within 15 days of the Engineer's failure to respond within the time prescribed, respectively, and demand an informal conference to meet and confer for settlement of the issues in dispute. Upon a demand, the City shall schedule a meet and conference within 30 days for settlement of the dispute.

G.C. 16.3.4 CLAIM FILING

If following the meet and conference described in G.C.16.3.3, Claim Conference, the claim or any portion remains in dispute, the Contractor may file a claim pursuant to Chapter 1 (commencing with Section 900) and Chapter 2 (commencing with Section 910) of Part 3 of Division 3.6 of Title 1 of the Government Code. For purposes of those provisions, the running of the period time within which a claim must be filed shall be tolled from the time the Contractor submits his or her written claim pursuant to G.C.16.2, Claims, until the time the claim is denied, including any period of time utilized by the meet and conference.

G.C. 16.3.5 CIVIL ACTIONS FOR CLAIMS LESS THAN $375,000

The following procedures are established for all civil actions filed to resolve claims for less than three hundred seventy five thousand dollars ($375,000).

1. Within 60 days, but not earlier than 30 days, following the filing or responsive pleading, the court shall submit the matter to non-binding mediation unless waived by mutual stipulation of both parties. The mediation process shall provide for the selection within 15 days by both parties of a disinterested third person as mediator, shall be commenced within 30 days of the submittal, and shall be concluded within 15 days from the commencement of the mediation unless a time requirement is extended upon a good cause showing to the court.

2. If the matter remains in dispute, the case shall be submitted to judicial arbitration pursuant to Chapter 2.5 (commencing with Section 1141.10) of Title 3 of Part 3 of the Code of Civil Procedure, notwithstanding Section 1141.11 of that Code. The Civil Discovery Act of 1986 (Article 3 (commencing with Section 2016) of Chapter 3 of Title 3 of Part 4 of the Code of Civil Procedure) shall apply to any proceeding brought under this subdivision consistent with the rules pertaining to judicial arbitration.

3. In addition to Chapter 2.5 (commencing with Section 1141.10) of Title 3 of Part 3 of the Code of Civil Procedure, (A) arbitrators shall, when possible, be experienced in construction law, and (b) any party appealing an arbitration award who does not obtain a more favorable judgment shall, in addition to payment of costs and fees under the chapter, also pay the attorney's fees on appeal of the other party.

G.C. 16.3.6 UNRESOLVED ISSUES

Unless this contract provides otherwise, all claims, counterclaims, disputes, and other matters in question between the City and the Contractor that are not resolved between the City and the Contractor and are not governed by Public Contract Code 20104 shall be decided by a court of competent jurisdiction. Arbitration shall not be used for resolution of these disputes. Should either party to this Agreement bring legal action against the other, the case shall be handled in the California County where the work is being performed.

G.C. 16.4 RECORDS OF DISPUTED WORK

In proceeding with a disputed portion of the work, the Contractor shall keep accurate records of its costs and shall make available, to the Engineer, a daily summary of the hours and classification of equipment and labor utilized on the disputed work, as well as a summary of any materials or any specialized services which are used. Such information shall be submitted to the Engineer on a monthly basis, receipt of which shall not be construed as an authorization for or acceptance of the disputed work.

G.C. 17 DOCUMENTS OF CONTRACTOR

Upon demand, the Contractor shall make available to the City all documents in its possession relevant to the work accomplished or to be accomplished or any demand or claim of the Contractor as to the City. This includes copies of documents sent by the Contractor to others relevant to the work. The Contractor shall further make available to the City conformed copies of all documents submitted to the sureties who executed indemnification made to such surety by others for such purpose. The Contractor shall maintain in its possession all documents to the work for three years after Notice of Completion.

G.C. 18 PROJECT SAFETY AND RESPONSIBILITY OF CONTRACTOR TO ACT IN AN EMERGENCY

The Contractor shall take all responsible precautions for the safety of, and shall provide all reasonable protection to prevent damage, injury or loss to:

1. All employees on the work and all other persons and organizations who may be affected thereby.
2. All the work and all materials and equipment to be incorporated therein, whether in storage on or off the site, under the care, custody or control of the Contractor of any of its subcontractors or sub-subcontractors.
3. Other property at the site or adjacent thereto, including trees, shrubs, lawns, walks, pavements, roadways, structure and utilities not designated for removal, relocation, or replacement in the course of construction.
4. Vehicular and pedestrian traffic on or near the project site. These requirements shall apply continuously and not be limited to normal working hours.

The Contractor shall give all notice and comply with all applicable laws, ordinances, rules, regulations and lawful orders of any public authority bearing on the safety of persons or property or their protection from damage, injury or loss. Except where otherwise expressly required by applicable laws, the City may monitor the Contractor's compliance with any laws or regulations.

The Contractor shall erect and maintain, as required by existing conditions and progress of the work, all reasonable safeguards for safety and protection, including posting danger signs and other warnings against hazards, promulgating safety regulations and notifying owners and uses of adjacent utilities.

Full compensation for the work involved in carrying out the safety precautions shall be considered as included in the various items of work and no additional payment will be made therefor.

In case of an emergency which threatens loss or injury to property or life, the Contractor shall act without previous instructions as the situation may warrant. The Contractor shall notify the Engineer immediately thereafter. Any compensation for emergency work claimed by the Contractor, together with substantiating documentation, shall be submitted to the City via the Engineer.

G.C. 19 LABOR CODE

A. Public Works. The services to be performed under this contract are for "public works" within the meaning of Labor Code Section 1720. The Contractor must comply with the requirements applicable to public works contractors as contained in Chapter 1, Part 7, Division 2 of the California Labor Code (commencing with Section 1720) and as set forth in this section. *This contract is subject to compliance monitoring and enforcement by the Department of Industrial Relations.*

B. Hours of Labor. As required by Labor Code Section 1810 and 1813, the parties stipulate as follows. Eight hours labor constitutes a legal day's work. The Contractor shall forfeit, as

penalty to the City, $25 for each workman employed in the performance of the Contract by the Contractor or by any subcontractor under him for each calendar day during which such workman is required or permitted to work more than eight hours in any one day and 40 hours in any one calendar week in violation of Labor Code Sections 1810 to 1815, except that work performed by employees of the Contractor in excess of eight hours per day and 40 hours during any one week shall be permitted upon compensation for all hours worked in excess of eight hours per day at not less than one-and-one-half times the basic rate of pay.

C. Prevailing Wage. Contractor must comply with the prevailing wage requirements of Labor Code Sections 1720 to 1780.

D. Wage Rates.

1. In accordance with Labor Code Section 1773.2, the City has obtained from the Director of the California Department of Industrial Relations the general prevailing rate of per diem wages and the general prevailing rate for holiday and overtime work in the locality in which the work is to be performed for each craft, classification, or type of worker needed to execute the contract, a copy of which is hereby incorporated by reference. Copies of the prevailing rates of per diem wages are on file in City's office and are available to any interested party.

2. The Contractor must post a copy of the prevailing rate of per diem wages at each job site.

3. The term "per diem wages" is defined in Labor Code Section 1773.1.

E. Failure to Pay Prevailing Wages.

1. In accordance with Labor Code Section 1775, the Contractor will forfeit as a penalty to the City an amount determined by the Labor Commissioner under Section 1775 for each calendar day or portion thereof for each workman paid less than stipulated prevailing wage rates for such work or craft in which such worker is employed for any work done under the Contract by the Contractor or by any subcontractor under the Contractor in violation of the provisions of the Labor Code.

2. As required by Labor Code Section 1775, the parties stipulate that the contractor and subcontractors must comply with Section 1775, and in the event of non-compliance with payment of prevailing wages to workers, the contractor or subcontractor must pay the difference between the prevailing wage rates and the amount paid to each worker for each calendar day or portion thereof for which each worker was paid less than the prevailing wage rate to each worker.

3. The City will not recognize any claim for additional compensation because of the payment by the Contractor of any wage rate in excess of the prevailing wage rate set forth in the Contract. The possibility of wage increases is one of the elements to be considered by the Contractor in determining his bid, and will not under any circumstances be considered as the basis of a claim against the City on the Contract.

F. Payroll Records.

1. The Contractor and each subcontractor must comply with Labor Code Section 1776 and all requirements of contractors stated therein for the maintenance, inspection and certification of payroll records.

2. The Contractor and each subcontractor must furnish electronic certified payroll records directly to the Labor Commissioner.

3. The Contract and each subcontractor must furnish certified payroll records to the City with each progress payment request.

4. The Contractor and each subcontractor who fails to timely furnish payroll records or make the records available for inspection will forfeit to the City the penalty for non-compliance set forth in Labor Code Section 1776 for their respective failure.

G. Apprentices. This subsection applies to contracts for Public Works involving $30,000 or more.

1. The contractor and each subcontractor must comply with the requirements for employment and compensation of apprentices as set for in Labor Code Section 1777.5. The prime Contractor is responsible for compliance with Labor Code Section 1777.5 for all apprenticeable occupations.

2. As required by Labor Code Section 1773.3, the City will send notice of the award of this Contract to the Division of Apprenticeship Standards within five days after award.

H. Discrimination. The contractor and each subcontractor must comply with the anti-discrimination requirements of Labor Code Section 1777.6.

I. Worker's Compensation.

1. In accordance Labor Code Section 1860, the contractor and each subcontractor must secure the payment of workers' compensation for their employees as required by Labor Code Section 3700.

2. Before performing the work, the Contractor must sign and file with the City, the certification required by Labor Code Section 1861.

J. Excavation Plans. As required by Labor Code Section 6705, for all public works projects in excess of $25,000 that involve excavation or trenching to a depth of five feet or more, the Contractor must submit a detailed plan showing the design of shoring, bracing, sloping, or other provisions to be made for worker protection from the hazard of caving ground during the excavation or trenching. The plan must comply with the following provisions.

1. If the plan varies from the shoring system standards, the plan must be prepared by a registered civil or structural engineer.

2. A note must be included on the plan by the registered civil or structural engineer certifying that the plan complies with the CAL OSHA Construction Safety Orders or that the

plan is not less effective than the shoring, bracing, sloping, or other provision of the Construction Safety Orders.

3. If the Engineer has investigated subsurface conditions in area where the work is to be performed, these investigations are identified in the Special Provisions and the records of the investigations are available for inspection in the Public Works Department. The plan will not be accepted by the City if the plan is based on subsurface conditions which are more favorable than those revealed by the Engineer's investigations, or if the plan is based on soils related design criteria which is less restrictive than the criteria set forth in the Engineer's report of investigations or subsurface conditions.

4. The detailed plan must include surcharge loads for nearby embankments and structures for spoil banks and for construction equipment and other construction loadings. The plan must indicate for all trench conditions, the minimum horizontal distances from the side of the trench at its top to the near side of the surcharge loads.

5. Nothing contained in this Section shall be construed to impose tort liability on the City or any of its employees or to relieve the Contractor of the full responsibility for providing shoring, bracing, sloping, or other provisions which are adequate for worker protection.

K. Subcontractor Eligibility**.** Contractor acknowledges that under Public Contract Code Section 6109 no contractor or subcontractor who is ineligible to bid or work on, or be awarded, a public works project under Labor Code Section 1777.1 or 1777.7 may bid on, be awarded, or perform work as a subcontractor on, a public works project. Contractor is prohibited from performing work on a public works project with a subcontractor who is ineligible to perform work on the public works project under Labor Code Section 1777.1 or 1777.7.

G.C. 20 SUPERVISION BY CONTRACTOR

The Contractor will supervise and direct the work competently and efficiently, devoting such attention thereto and applying such skills and expertise as may be necessary to perform the work in accordance with the Contract Documents. The Contractor will be solely responsible for the means, methods, techniques, sequences and procedures of construction. The Contractor shall be responsible to see that the finished work complies accurately with the Contract Documents. The Contractor will employ and maintain on the work site a qualified supervisor or superintendent who shall have been designated in writing by the Contractor as the Contractor's representative at the site. The supervisor shall have full authority to act on behalf of the Contractor and all communications given to the supervisor shall be as binding as if given to the Contractor. The supervisor shall be present on the work site at all times as required to perform adequate supervision and coordination of the work. The Contractor shall not change job supervisor without written approval of the Engineer. Full compensation for conforming to the requirements of this Section shall be considered included in the contract pries paid for the various items of work and no additional compensation shall be allowed therefore.

G.C. 21 ALTERNATIVE METHODS OF CONSTRUCTION

Whenever the Contract Documents provide more than one method of construction or more than one specified type of construction equipment may be used to perform portions of the work and

the Contract Documents leave the selection of the method of construction or the type of equipment to be used up to the Contractor, it is understood that the City does not guarantee that every such method of construction or the type of equipment can be successfully used throughout all or any part of any project. It shall be the Contractor's responsibility to select and use the alternative or alternatives which will satisfactorily perform the work under the conditions encountered. In the event some of the alternatives on any project or equipment specified cannot be utilized, the Contractor shall be responsible for completing the work in a satisfactory and workmanlike manner to provide the intended service and full compensation for any additional cost involved shall be considered as included in the contract price paid for the item of work involved and no additional compensation will be allowed therefore.

G.C. 22 PROJECT APPEARANCE

The Contractor shall maintain a neat appearance of the work. In any area visible to the public, broken concrete and debris developed during clearing and grubbing shall be disposed of concurrently with its removal. If stockpiling is necessary, the material shall be removed or disposed weekly.

Full compensation for conforming to the provisions in this Section not otherwise provided for shall be considered as included in prices paid for the various contract items of work involved and no additional compensation will be allowed therefore.

G.C. 23 INSURANCE HOLD HARMLESS

The Contractor shall, before the commencement of work herein specified, procure and maintain in full force and effect during the life of the contract, at its sole expense, insurance as described in Section 14 of the Construction Agreement.

G.C. 24 EQUAL EMPLOYMENT OPPORTUNITY

General: The Contractor shall not discriminate in its recruiting, hiring, promotion, demotion or termination practices on the basis of race, religious creed, color, national origin, ancestry, sex, age, physical handicap, medical condition, or marital status in the performance of this Contract and shall comply with the provisions of the California Fair Employment and Housing Act (commencing with Section 12900 of the Government Code), Federal Executive Order No. 11246 (30 Federal Register 12319), as amended, and all administrative rules and regulations issued pursuant to said Acts and Order. See particularly 41 Code of Federal Regulation (CFR) Chapter 60.

The Contractor shall require each of its subcontractors to comply with the preceding paragraph and shall include in each subcontract language similar to the preceding paragraph.
Each bidder shall submit with the bid proposal a fully executed Certificate of Non-Discrimination by Contractors. Bids will not be considered unless accompanied by the completed Certificate.

A. Transactions of $10,000 and Less

1. Contracts and subcontracts not exceeding $10,000 are exempt from the requirements of this clause.

2. No Contractor or subcontractor shall procure supplied and/or services in less than usual quantities to avoid applicability of the Equal Opportunity Clause. With respect to contracts and subcontracts for indefinite quantities, the Equal Opportunity Clause shall apply unless it is determined by the City that the amount to be ordered in any one year under such contract reasonably will be expected not to exceed $10,000.

B. Transactions in Excess of $10,000, but Less Than $50,000

1. Each prime contractor shall certify that it has in effect an affirmative action plan and agrees to comply with all state and federal laws and regulations concerning Fair Employment Practices.
2. The contractor shall maintain a written copy of its affirmative action plan and will furnish a copy to the City upon request by the City. The City reserves the right, during the life of this Contract, to require the contractor to complete an affirmative action compliance report furnished by the City setting definite goals and timetables and indicating progress in meeting the goals.

C. Transactions of $50,000 or More

1. Each prime contractor who has fifty or more employees and a contract of $50,000 or more shall develop and submit to the City within thirty days of award a written affirmative action compliance program including definite goals and timetables with proposed dates of compliance. The prime contractor shall make, as a condition of its subcontract, the same requirement of each subcontractor who has fifty or more employees and a subcontract of $50,000 or more. Each contractor shall include in its affirmative action compliance program a complete table of its employees' job classifications. This table must include, but need to be limited to, job titles, duties and rates of pay.
2. The contractor agrees to permit access to its records or employment advertisement, application forms and other pertinent data and records by the City or its designee and any state or federal agency having jurisdiction for the purposes of investigation to ascertain compliance with the Fair Employment Practices section of this contract.
3. The City shall have the right to assign an affirmative action representative to monitor the conduct of the contractor and subcontractors under this contract. The affirmative action representative shall have the right to enter the construction or manufacturing site to obtain information from persons performing work on the project, providing such inspection shall not in any way interfere with the progress of the work under contract.

G.C. 25 TERMINATION OF CONTRACT BY CONTRACTOR

The Contractor may terminate the contract upon ten (10) days calendar day's written notice to the City whenever (1) the entire work has been suspended in accordance with these provisions for sixty (60) consecutive calendar days through no fault or negligence of the Contractor, and notice to resume work or to terminate the contract has not been received from the City within this time period; or (2) the City should fail to pay the Contractor any substantial sums due it in accordance with the terms of the contract and within the time limits prescribed. In the event of such termination, the Contractor shall have no claims against the City except for those claims specifically enumerated in these provisions and determined in accordance thereof.

AGENDA ITEM NO. 11.A

CITY COUNCIL AGENDA STAFF REPORT

DATE:	September 10, 2024
SUBMITTED BY:	Jozi Plut, Admin (CM, CA, Fin, HR, IT)
ITEM TYPE:	Item Without Staff Report
AGENDA SECTION:	**PUBLIC HEARINGS**
SUBJECT:	**Adoption of the Revised Housing Element 2023-2031**
SUGGESTED ACTION:	Adopt a resolution making findings that the revised 2023-2031 Housing Element is consistent with Housing Element Law, and that the Housing Element as revised is consistent with the program EIR prepared for the project and no further environmental document is required, and amending the 2035 General Plan by repealing the previously adopted 2023-2031 Housing Element and adopting the revised 2023-2031 Housing Element

ATTACHMENTS:
Staff Report
Resolution
HCD Letter July 26 2024
Draft Housing Element July 2024
AppA_Needs Analysis
AppB_sites-inventory-template Belmont
AppC_AFFH
AppD_PrevHE
AppE_Outreach

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Kathy Kleinbaum, Assistant City Manager; Laura Russell, Deputy Community Development Director
Agenda Title:	Adoption of the Revised Housing Element 2023-2031
Agenda Action:	Resolution

Recommendation

Adopt a resolution making findings that the revised 2023-2031 Housing Element is consistent with Housing Element Law, and that the Housing Element as revised is consistent with the program EIR prepared for the project and no further environmental document is required, and amending the 2035 General Plan by repealing the previously adopted 2023-2031 Housing Element and adopting the revised 2023-2031 Housing Element.,

Strategic Focus Area

Economic Development and Housing

Background

State law requires California's local governments to adopt a housing element as part of their general plan that demonstrates how the local government will meet state mandated housing planning requirements. The City's Housing Element must be updated on a regular schedule and is subject to specific regulatory requirements and process established by the state Housing Element Law (Government Code Sections 65580-65589.11). The current housing element planning cycle covers the period from 2023 through 2031. The State Department of Housing and Community Development (HCD) must review and certify that each jurisdiction's housing element meets all the requirements of the law.

The City began work on the Housing Element Update in 2021, resulting in City Council certification of the Final Programmatic Environmental Impact Report (EIR) and adoption of the Housing Element on January 30, 2023, prior to the statutory deadline of January 31, 2023. Since that time, the City has been working on revisions to the adopted Housing Element in response to two letters from HCD requiring specific revisions on April 3, 2023 and on December 18, 2023.

Staff held several meetings with HCD staff between January 2024 and May 2024 to review the December 2023 comment letter and discuss how to best respond to HCD's comments. Through this process, the HCD supervisor has provided feedback on how to best collaborate with HCD towards certification. On May 21, 2024, the City published a draft revised Housing Element for a 7-day public review period and then submitted it to HCD for their review on May 28, 2024.

During HCD's 60-day statutory review period, staff met with HCD to discuss interim revisions necessary

to achieve compliance. Based on HCD feedback, a revised Housing Element was posted for a 7-day public review period on July 18, 2024. The changes to this version were minor and primarily included revisions to the metrics for several Housing Element programs in Chapter 7. On July 26, 2024, the City received a comment letter from HCD stating that the revised draft Housing Element meets the statutory requirements of State Housing Element Law. In order for HCD to certify the Housing Element, the City must repeal the previously adopted Housing Element and adopt a revised Housing Element 2023-2031 and resubmit the document to HCD for their final review.

The Planning Commission held a Public Hearing on August 20, 2024 and unanimously recommended that the City Council adopt the revised Housing Element. The City only received one public comment on the Housing Element, as a result of the public hearing and noticing process, which was from a property owner included in the sites inventory who stated that they had no current plans to redevelop their property.

Analysis

The analysis below provides a high-level summary of revisions that have been made to the Housing Element since Planning Commission review and City Council adoption in January 2023. The revisions to the Housing Element can be generally characterized in two ways: 1) Policy enhancements to meet the requirements to Affirmatively Further Fair Housing (AFFH); and 2) Changes to improve clarity and standardize assumptions. Staff brought these revisions to City Council for feedback prior to implementing them at the March 26, 2024 meeting and received direction to move forward with the revisions, as proposed.

Policy Enhancements to Affirmatively Further Fair Housing (AFFH)

State law requires jurisdictions to include Housing Element programs that actively seek to achieve fair housing. Pursuant to AFFH law, the City has a legal obligation to take meaningful actions to combat discrimination, overcome patterns of segregation, and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Current AFFH rules go further than past regulations and require jurisdictions to actively work to dismantle the legacy of segregation and to take actions to create equal housing opportunities. Cities are expected to include "housing mobility programs," which are strategies that provide opportunities for lower income households to live in "high resource" areas, which are areas associated with positive economic, educational and health outcomes.

All of Belmont is in a high resource area, as mapped by HCD. In this context, housing mobility programs are typically designed to encourage a diversity of housing types throughout the community, allowing better access for lower income households into these neighborhoods. The primary focus of the programs included in the revised Housing Element achieve this goal by enhancing existing State programs related to ADU development and SB9 units by allowing for more flexibility unit sizes and configurations than provided for by State law. In addition, staff has committed to do more extensive outreach and provide technical support to encourage more ADUs and the development of affordable housing projects on properties owned by religious institutions and schools.

Changes to Improve Clarity and Standardize Assumptions

In light of the comments received from HCD in December of 2023 and through subsequent meetings with

HCD staff, staff identified opportunities to improve clarity in the document to make it easier for HCD to confirm compliance and for the City to implement. The changes summarized below are organizational and technical in nature and do not include any policy changes.

- General reorganization: Staff heard from HCD that it was difficult to find the materials that they need to review in the document and appendices. The prior versions of the document, including the Adopted January 2023 version and the October 2023 update, consisted of an Executive Summary and a number of appendices. This organization made it difficult to confirm legal compliance and to follow the document as a whole. The Housing Element was revised to move key topics into a main document that replaced the previous Executive Summary. There are still appendices on certain topics where additional, supporting information is needed. This approach makes the narrative of the Housing Element easier to follow, with more clear connections between the laws and housing issues the document seeks to address and the actions to address them. As a result, the Housing Element looks different than prior versions but still contains the same information in a format that is easier to understand and implement.
- Housing Site Methodology: The changes made to the housing sites inventory are technical in nature and are related to the assumptions about how the sites in the inventory could develop over time and the assumed affordability of the resulting units. Staff standardized the approach to the assumptions made to be consistent with HCD guidance. The result is a reduction in the assumed density that will be built on each site, which is a more conservative approach. Additionally, HCD asked for additional justification for the properties that are expected to consolidate, resulting in one development across multiple original properties. In response, staff has broken up some of the larger sites that consisted of multiple parcels with differing ownerships and made them into separate, smaller opportunity sites. In addition, staff removed a few small properties from the inventory that are less likely to consolidate and are not necessary to meet the Regional Housing Needs Allocation (RHNA) obligations. These revisions resulted in a reduction in the buffer the City is providing from roughly 680 units to 515 units, which is still adequate to address our RHNA obligation.

Findings for Non-Vacant Sites

The revised Housing Element relies upon non-vacant sites to accommodate more than 50% of the RHNA for lower-income households. This is typical for many cities that are primarily built-out and therefore reliant on infill development to meet their RHNA goals. HCD requires cities in this circumstance to demonstrate that existing uses are not an impediment to additional residential development and to make findings to support this analysis in their adoption resolutions.

In Belmont, 51% percent of the RHNA for lower-income unit capacity, excluding units in pending and pipeline projects, are on non-vacant sites (20 of 22 sites in the sites inventory are nonvacant). Staff followed HCD guidance when performing its section 65583.2(g)(2) analysis and provided substantial evidence in Chapter 6 of the Revised Housing Element that the existing uses will be discontinued or will not be an impediment to residential development during the planning period based on the physical characteristics, existing uses, and redevelopment potential (including improvement to land ratio, age of structures, building stories, lot coverage) and known developer/owner interest.

The redevelopment of underutilized commercial sites for housing is a growing national trend that is clearly reflected in Belmont and other nearby cities in the region. Strong housing demand and high land values for residential development, together with weakening demand for commercial uses, have made conversion to residential use within the planning period likely for multiple sites that currently have commercial uses. Currently, 90% of the units that are currently in the City's active development pipeline (896 out of 998) are located on sites with prior commercial uses.

Environmental Review (CEQA)

The City of Belmont prepared a Final Programmatic Environmental Impact Report (EIR) under the California Environmental Quality Act (CEQA) for the Belmont Housing Element 2023-2031 update. The City Council adopted Resolution No. 2023-0008 on January 30, 2023, certifying the Final Program EIR. The revisions proposed in the Housing Element would not add any sites for multifamily housing from those in the formerly approved Housing Element analyzed in the program EIR. Likewise, no revisions are proposed which would alter or modify regulations in regard to density of development, scale of buildings, infrastructure, land uses or location which were not analyzed in the EIR. For this reason, the revised Housing Element is within the scope of the program EIR, and no subsequent or supplemental EIR is needed for these amendments, in that the changes are not substantial; and no substantial evidence exists showing that: (1) the changes in the Element will involve any new significant environmental effects or a substantial increase in the severity of previously identified environmental effects; (2) circumstances have changed since the EIR was certified; or (3) new information is available, which was not known and could not have been known when the EIR was certified, that shows that the Housing Element will have significant impacts not considered in the EIR. (CEQA Guidelines Sections 15168 and 15162.)

Alternatives

1. Refer the revised 2023-2031 Housing Element back to staff for revisions.

Attachments

A. Housing Element Adoption Resolution

B. HCD Comment Letter, July 26, 2024

C. Amended General Plan Housing Element 2023-2031

- Appendix A: Housing Need Analysis
- Appendix B: Sites Inventory
- Appendix C: Fair Housing Assessment
- Appendix D: Review of Prior Housing Element Goals, Policies, and Programs
- Appendix E: Outreach

Fiscal Impact

☒ No Fiscal Impact

Adoption of the Housing Element 2023-2031 does not have any direct financial implications for the City. Implementation of the

goals, policies and programs identified in the Housing Element will require significant staff resources during the next planning period, which will be considered by the City Council during each annual budget review process.

☐ Funding Source Confirmed: Insert Acct # and additional information

Source:	**Purpose:**	**Public Outreach:**
Staff	Statutory/Contractual Requirement	Posting of Agenda *

*The City has also complied with the following public notification requirements:

1. A notice of public hearing was published in the Redwood City Tribune on August 30, 2024, Government Code Section 65090.
2. Notices were mailed to the owners of all property included on the Housing Sites Inventory, per Government Code Section 65091(a)(1) prior to the Planning Commission Public Hearing informing the owners of both the Planning Commission and City Council public hearing dates.
3. Notice of public hearing was posted in three public locations: Belmont City Hall, Belmont Library, and Barrett Community Center, per Government Code Section 65090(a).

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT TO ADOPT A GENERAL PLAN AMENDMENT TO REPEAL THE PREVIOUSLY ADOPTED 2023-2031 HOUSING ELEMENT AND ADOPT THE REVISED HOUSING ELEMENT OF THE 2035 GENERAL PLAN FOR THE PERIOD OF 2023-2031, IN COMPLIANCE WITH STATE HOUSING ELEMENT LAW

WHEREAS, the California Legislature has found that "California has a housing supply and affordability crisis of historic proportions. The consequences of failing to effectively and aggressively confront this crisis are hurting millions of Californians, robbing future generations of the chance to call California home, stifling economic opportunities for workers and businesses, worsening poverty and homelessness, and undermining the state's environmental and climate objectives" (Gov. Code Section 65589.5.); and,

WHEREAS, the Legislature has further found that "Among the consequences of those actions are discrimination against low-income and minority households, lack of housing to support employment growth, imbalance in jobs and housing, reduced mobility, urban sprawl, excessive commuting, and air quality deterioration" (Gov. Code Section 65589.5.); and,

WHEREAS, the Legislature recently adopted the Housing Crisis Act of 2019 (SB 330) which states that "In 2018, California ranked 49th out of the 50 states in housing units per capita… California needs an estimated 180,000 additional homes annually to keep up with population growth, and the Governor has called for 3.5 million new homes to be built over 7 years"; and,

WHEREAS, State Housing Element Law (Government Code Sections 65580 et seq.) requires that the City of Belmont adopt a Housing Element for the eight-year period 2023-2031 to accommodate the City of Belmont's ("City") regional housing need allocation ("RHNA") of 1,785 units, comprised of 488 very low-income units, 281 low-income units, 283 moderate income units, and 733 above moderate-income units; and,

WHEREAS, to comply with State Housing Element Law, the City has prepared the Housing Element 2023-2031 (the "Housing Element") in compliance with State Housing Element Law and has identified sites that can accommodate housing units meeting the City's RHNA allocation; and,

WHEREAS, as provided in Government Code Section 65350 et. seq., adoption of the Housing Element constitutes a General Plan Amendment; and,

WHEREAS, the preparation, adoption, and implementation of the Housing Element requires a diligent effort to include all economic segments of the community; and,

WHEREAS, the City conducted extensive community outreach related to the Housing Element, beginning in May 2021, including hosting multiple community workshops, Planning Commission and City Council hearings, as described in detail in Appendix E to the proposed Housing Element Update; and,

WHEREAS, Government Code Section 65583.2(g)(2) requires that any jurisdiction relying on non-vacant sites to meet more than 50 percent of the RHNA for lower-income households must make findings based on substantial evidence that the existing use on the non-vacant site is not an impediment to residential development during the planning period; and,

WHEREAS, the City has followed HCD guidance when performing its analysis of non-vacant sites under Government Code Sections 65583(g)(1) and 65583.2(g)(2) and has provided substantial evidence in Chapter 6 of the revised Housing Element that the existing uses are likely to be discontinued and will not be an impediment to additional residential development during the planning period based on the physical characteristics, existing uses, redevelopment potential (including improvement to land ratio, age of structures, building stories, lot coverage), known developer/owner interest, the City's past experience with converting existing uses to higher density residential development, the current market for the existing uses, an analysis of existing leases to the extent information is known, development trends for other non-vacant sites on which development applications have been filed in Belmont and in other nearby cities in the region, and the significant regulatory incentives to encourage additional residential development on these sites; and

WHEREAS, in accordance with Government Code Section 65585(b), on July 1, 2022, the City posted the draft Housing Element and requested public comment for a 45-day review period, and on August 24, 2022, after responding to public comments, the City submitted the draft Housing Element to the State Department of Housing and Community Development (HCD) for its review; and,

WHEREAS, on November 22, 2022, the City received a letter from HCD providing its findings regarding the draft Housing Element; and,

WHEREAS, in accordance with Government Code Section 65585 (b) on January 13, 2023, the City published a revised draft Housing Element responding to HCD's findings and requested public comment; and,

WHEREAS, The City of Belmont prepared a Final Programmatic Environmental Impact Report (EIR) for the Belmont Housing Element 2023-2031 update pursuant to the California Environmental Quality Act (CEQA); and

WHEREAS, the City Council adopted Resolution No. 2023-008 on January 30, 2023, certifying a programmatic Environmental Impact Report (EIR) for the Housing Element 2023-2031 that analyzed the reasonably foreseeable and potentially significant adverse effects of the proposed project pursuant to the California Environmental Quality Act (CEQA); and,

WHEREAS, on January 30, 2023, the City Council adopted a General Plan Amendment to repeal the 2015-2023 Housing Element and adopt the Housing Element of the 2035 General Plan for the period of 2023-2031, in compliance with State Housing Element Law and submitted the 2023-2031 Housing Element to HCD for its review; and

WHEREAS, on April 3, 2023, the City received a letter from HCD providing its findings regarding the adopted Housing Element; and,

WHEREAS, in accordance with Government Code Section 65585 (b), on October 11, 2023, the City published a revised draft Housing Element responding to HCD's findings and requested public comment on the draft for a 7-day review period, and on October 19, 2023, after responding to public comments, submitted the document to HCD for its review; and,

WHEREAS, on December 18, 2023, the City received a letter from HCD providing its findings regarding the draft revised Housing Element; and,

WHEREAS, in accordance with Government Code Section 65585 (b), on May 21, 2024, the City published a revised draft Housing Element responding to HCD's findings and requested public comment on the draft for a 7-day review period, and on May 28, 2024, after receiving no public comments, submitted the document to HCD for its review; and,

WHEREAS, in accordance with Government Code Section 65585 (b), on July 18, 2024, the City posted a revised draft of the Housing Element and requested public comment for a 7-day review period, and on July 25, 2024, after receiving no public comments, the City resubmitted the draft revised Housing Element to HCD for its review; and,

WHEREAS, on July 26, 2024, the City received a letter from HCD, provided as Exhibit A to this resolution, stating that the revised draft Housing Element meets the statutory requirements of the State Housing Element Law and that the Housing Element will substantially comply with State Housing Element Law (Gov. Code Sections 65580 et seq) when it is adopted, submitted to, and approved by HCD, in accordance with Government Code section 65585; and,

WHEREAS, on August 20, 2024, the Planning Commission held a duly and properly noticed public hearing and recommended that the City Council repeal the previously adopted Housing Element adopt the revised Housing Element; and,

WHEREAS, on September 10, 2024, the City Council conducted a duly and properly noticed public hearing to take public testimony and consider this Resolution regarding the proposed revised Housing Element, reviewed the Housing Element and all pertinent maps, documents and exhibits, including HCD's findings, the City's response to HCD's findings, the staff report and all attachments, and oral and written public comments; and,

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. The foregoing recitals are true and correct and are incorporated by reference into this action.

SECTION 2. The Housing Element substantially complies with State Housing Element Law.

SECTION 3. The City Council finds, based on substantial evidence and information provided in the record, including Chapter 6 of the Housing Element, that the existing uses on the non-vacant sites identified in the site inventory to accommodate the RHNA are likely to be discontinued during the planning period and therefore do not constitute an impediment to planned residential development on the site during the planning period.

SECTION 4. As required by Government Code § 65585(e), the City Council has considered the findings made by the Department of Housing and Community Development included in the Department's letter to the City dated July 26, 2024 (Exhibit A to this resolution).

SECTION 5. The City Council finds the revisions proposed in the Housing Element would not add any sites for multifamily housing from those in the formerly approved Housing Element analyzed in the program EIR. Likewise, no revisions are proposed which would alter or modify regulations in regard to density of development, scale of buildings, infrastructure, land uses or location which were not analyzed in the EIR. For this reason, the revised Housing Element is within the scope of the program EIR, and no subsequent or supplemental EIR is needed for these amendments, in that the changes are not substantial; and no substantial evidence exists showing that: (1) the changes in the Element will involve any new significant environmental effects or a substantial increase in the severity of previously identified environmental effects; (2) circumstances have changed since the EIR was certified; or (3) new information is available, which was not known and could not have been known when the EIR was certified, that shows that the Housing Element will have significant impacts not considered in the EIR. (CEQA Guidelines Sections 15168 and 15162.)

SECTION 6. The City of Belmont 2023-2031 Housing Element is hereby repealed in its entirety, and the revised City of Belmont 2023-2031 Housing Element, attached hereto as Exhibit B, incorporated by this reference.

SECTION 7. This resolution shall become effective immediately upon its adoption.

SECTION 8. The Community Development Director or designee is hereby directed to file all necessary materials with the Department of Housing and Community Development for the Department to find that the Housing Element is in conformance with State Housing Element Law and is further directed and authorized to make non-substantive changes to the Housing Element to make it internally consistent or to address any non-substantive changes or amendments required by the Department to achieve a finding of substantial conformance with State Housing Element Law.

SECTION 9. The Community Development Director or designee is hereby directed to distribute copies of the Housing Element in the manner provided in Government Code §§65357 and 65589.7.

* * *

ADOPTED September 10, 2024, by the City of Belmont City Council by the following vote:

Ayes:

Noes :

Absent:

Abstain:

ATTEST:

_____

City Clerk

_____

Mayor

APPROVED AS TO FORM:

_____

City Attorney

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT
DIVISION OF HOUSING POLICY DEVELOPMENT
651 Bannon Street, Suite 400
Sacramento, CA 95811
(916) 263-2911 / FAX (916) 263-7453
www.hcd.ca.gov

July 26, 2024

Afshin Oskoui, City Manager
City of Belmont
1 Twin Pines Lane
Belmont CA, 94002

Dear Afshin Oskoui:

RE: City of Belmont's 6th Cycle (2023-2031) Revised Draft Housing Element

Thank you for submitting the City of Belmont's (City) revised draft housing element received for review on May 28, 2024, along with revisions received on July 26, 2024. The revisions were posted and made available to the public for seven days prior to review. Pursuant to Government Code section 65585, the California Department of Housing and Community Development (HCD) is reporting the results of its review.

The revised draft housing element, incorporating the revisions, meets the statutory requirements of State Housing Element Law, including requirements described in HCD's December 18, 2023 review. In addition, this finding of compliance was based upon the adoption of Ordinance Number 2024-1175 to make prior identified sites available for lower-income households. The housing element will substantially comply with State Housing Element Law (Gov. Code, § 65580 et seq) when it is adopted, submitted to, and approved by HCD, in accordance with Government Code section 65585.

As a reminder, the City's 6th cycle housing element was due January 31, 2023. As of today, the City has not completed the housing element process for the 6th cycle. The City's 5th cycle housing element no longer satisfies statutory requirements. HCD encourages the City to adopt and submit to HCD to regain housing element compliance.

Public participation in the development, adoption and implementation of the housing element is essential to effective housing planning. Throughout the housing element process, the City must continue to engage the community, including organizations that represent lower-income and special needs households, by making information regularly available while considering and incorporating comments where appropriate. Please be aware, any revisions to the element must be posted on the local government's website and to email a link to all individuals and organizations that have previously requested notices relating to the local government's housing element at least seven days before submitting to HCD.

In addition, as noted in the housing element, the housing element relies upon nonvacant sites to accommodate more than 50 percent of the Regional Housing Needs Allocation (RHNA) for lower-income households. For your information, the housing element must demonstrate existing uses are not an impediment to additional residential development and will likely discontinue in the planning period (Gov. Code, § 65583.2, subd. (g)(2).). Absent findings (e.g., adoption resolution) based on substantial evidence, the existing uses will be presumed to impede additional residential development and will not be utilized toward demonstrating adequate sites to accommodate the RHNA.

Please note, upon adoption of the housing element, the City must submit an electronic version of the sites inventory with its adopted housing element to sitesinventory@hcd.ca.gov. Pursuant to Government Code section 65583.3, subdivision (b), the City must utilize standards, forms, and definitions adopted by HCD when preparing the sites inventory. Please see HCD's housing element webpage at https://www.hcd.ca.gov/planning-and-community-development/housing-elements for a copy of the form and instructions. The City can reach out to HCD at sitesinventory@hcd.ca.gov for technical assistance.

Several federal, state, and regional funding programs consider housing element compliance as an eligibility or ranking criteria. For example, the CalTrans Senate Bill (SB) 1 Sustainable Communities grant, the Affordable Housing and Sustainable Communities programs, and HCD's Permanent Local Housing Allocation consider housing element compliance and/or annual reporting requirements pursuant to Government Code section 65400. With a compliant housing element, the City will meet housing element requirements for these and other funding sources.

For your information, some general plan element updates are triggered by housing element adoption. HCD reminds the City to consider timing provisions and welcomes the opportunity to provide assistance. For information, please see the Technical Advisories issued by the Governor's Office of Planning and Research at: https://www.opr.ca.gov/planning/general-plan/guidelines.html.

HCD appreciates the hard work and dedication Kathy Kleinbaum, Assistant City Manager, and Laura Russell, Deputy Community Development Director provided in preparation of the City's housing element and looks forward to receiving the City's adopted housing element. If you have any questions or need additional technical assistance, please contact Andrea Grant, of our staff, at andrea.grant@hcd.ca.gov.

Sincerely,



Paul McDougall
Senior Program Manager

City of BELMONT

2023 - 2031 Housing Element Update







Prepared for:

City of Belmont

July 2024

ACKNOWLEDGEMENTS

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1 INTRODUCTION

Since 1969, State law requires that jurisdictions throughout California complete a Housing Element. The City itself is not responsible for building or producing this housing, but it must demonstrate that it has policies and programs in place to support housing construction for all income levels, as well as available land appropriately zoned to accommodate new housing. The Housing Element must include a variety of statistics on housing needs, constraints to development, and policies and programs to implement a variety of housing-related land use actions, and a detailed inventory of "opportunity sites" on which future housing may be built.

The Housing Element is part of the City's General Plan and sets forth the policies and programs to address the housing needs for Belmont. It is the City's eight-year housing strategy from the period of 2023-2031 for how it will meet the community's housing needs. State law (Government Code Sections 65580-65589.8) requires that every city and county in California adopt a Housing Element, subject to State approval, as part of its General Plan. Per Senate Bill (SB) 375 (Statutes of 2008), the planning period for the Housing Element is eight years. The Housing Element is the only element of a locality's General Plan that must be approved ("certified") by the State, through its Department of Housing and Community Development (HCD) to ensure it meets all statutory requirements. Having a certified Housing Element is a prerequisite for many state grants and funding programs.

1.1 INTRODUCTION TO BELMONT

Known for its wooded hills, views of the San Francisco Bay and stretches of open space, Belmont is a quiet residential community amid the culturally and technologically rich Bay Area. Belmont is in San Mateo County, half-way between San Francisco and San Jose. The city is within easy driving distance of the Pacific coast, three major airports, and major employment centers including San Francisco, Silicon Valley, and the East Bay. Since its incorporation in 1926, Belmont has grown from a small town of less than 1,000 residents to a community of over

28,000 in 2020. Much of the city's population and housing growth occurred during the 1950s and 1960s during the post-war periods. Most of the neighborhoods are found on the hillsides with access to many open spaces and parks. There are excellent public and private schools with high test scores. The downtown has easy access to freeway and rail transportation and is a mix of small shops and other commercial uses.



Three21 @ Belmont Apartments located at 321 Oxford Way

The community is approaching build-out and has a limited amount of vacant land available for future residential development. Some small vacant residential lots exist in the hillside neighborhoods. However, there are substantial opportunities for revitalization and redevelopment of older buildings into new residential development in the downtown and along the major commercial arterials, El Camino Real, Ralston Avenue, and Old County Road.

1.2 HOUSING ELEMENT UPDATE PROCESS

The California State Legislature has identified the attainment of a decent home and suitable living environment for every Californian as a statewide goal. Local planning programs play a critical part in achieving this goal. Therefore, the Legislature mandates that all cities and counties prepare a Housing Element as part of their comprehensive General Plans (California Government Code Section 65580 et al.).

It is intended that this Housing Element be reviewed annually and updated and modified not less than every eight years to remain relevant and useful and reflect the community's changing housing needs including the state's mandated housing needs allocation. The City will annually review its progress implementing the Housing Element through Annual Progress Reports required to be submitted to the State. The City is updating its Housing Element at this time to comply with the update required of all jurisdictions in the Association of Bay Area Governments (ABAG) region, as well as to respond to the issues that currently face the City. This Housing Element update covers the planning period from January 31, 2023 through January 31, 2031, which represents the sixth cycle for the region.

1.3 LEGISLATIVE CONTEXT

Since the City's last Housing Element was adopted and certified in 2014, many pieces of housing legislation have been signed into law, resulting in substantive changes to state housing law and Housing Element requirements.

- **Affordable Housing Streamlined Approval Process: Senate Bill 35 (2017), Assembly Bill 168 (2020), and Assembly Bill 831 (2020).** SB 35 created a streamlined, ministerial review

process for qualifying multi-family, urban infill projects in jurisdictions that have failed to approve housing projects sufficient to meet their state-mandated RHNA. Among other requirements, to qualify for streamlining under SB 35, a project must incorporate one of two threshold levels of affordable housing: (1) 10 percent of the project's units in jurisdictions that have not approved housing projects sufficient to meet their RHNA for above moderate-income housing or have failed to submit an annual progress report as required under State law; or (2) 50 percent of the project's units in jurisdictions that have not approved housing projects sufficient to meet their RHNA for below moderate-income housing. AB 168 added a requirement to provide a formal notice to each California Native American tribe that is affiliated with the area of the proposed project. The Housing Element must describe the City's processing procedures related to SB 35. This is discussed further in *Chapter 4, Constraints*.

- **Additional Housing Element Sites Analysis Requirements: Assembly Bill 879 (2017) and Assembly Bill 1397 (2017).** These bills require additional analysis and justification of the sites included in the sites inventory of the City's Housing Element. The Housing Element may only count non-vacant sites included in one previous housing element inventory and vacant sites included in two previous housing elements if the sites are subject to a program that allows affordable housing by right. Additionally, the bills require additional analysis of non-vacant sites and additional analysis of infrastructure capacity, and place size restrictions on all sites.
- **Affirmatively Furthering Fair Housing: Assembly Bill 686 (2017).** AB 686 ensures that public entities, including local governments, administer their programs relating to housing and urban development in a manner affirmatively to further the purposes of the federal Fair Housing Act and do not take any action that is materially inconsistent with its obligation to affirmatively further fair housing. It also requires that housing elements of each city and county promote and affirmatively further fair housing opportunities throughout the community for all persons regardless of race, religion, sex, marital status, ancestry, national origin, color, familial status, or disability, and other characteristics protected by the California Fair Employment and Housing Act, Government Code Section 65008, and any other state and federal fair housing and planning law. AB 686 requires jurisdictions to assess fair housing in the housing element, prepare the housing element site inventory through the lens of affirmatively furthering fair housing, and include program(s) to affirmatively further fair housing.
- **No-Net-Loss Zoning: Senate Bill 166 (2017).** SB 166 amended the No-Net-Loss rule to require that the land inventory and site identification programs in the Housing Element include sufficient sites to accommodate the unmet RHNA. When a site identified in the Housing Element as available to accommodate the lower-income portion of the RHNA is actually developed for a higher income group, the City must either (1) identify, and rezone, if necessary, an adequate substitute site or (2) demonstrate that the land inventory already contains an adequate substitute site.
- **By Right Transitional and Permanent Supportive Housing: Assembly Bill 2162 (2018) and Assembly Bill 101 (2019).** AB 2162 requires the City to change its zoning to provide a

"by right" process and expedited review for supportive housing. The bill prohibits the City from applying a conditional use permit or other discretionary review to the approval of 100 percent affordable developments that include a percentage of supportive housing units, either 25 percent or 12 units, whichever is greater. The change in the law applies to sites in zones where multi-family and mixed uses are permitted, including in nonresidential zones permitting multi-family use. Additionally, AB 101 requires that a Low Barrier Navigation Center development be a use by right in mixed-use zones and nonresidential zones permitting multi-family uses if it meets specified requirements.

- **Accessory Dwelling Units (ADUs): Assembly Bill 2299 (2016), Senate Bill 1069 (2016), Assembly Bill 494 (2017), Senate Bill 229 (2017), Assembly Bill 68 (2019), Assembly Bill 881 (2019), Assembly 587 (2019), Senate Bill 13 (2019), Assembly Bill 670 (2019), Assembly Bill 671 (2019), and Assembly Bill 3182 (2020).** In recent years, multiple bills have added requirements for local governments related to ADU ordinances. The 2016 and 2017 updates to State law included changes pertaining to the allowed size of ADUs, permitting ADUs by right in at least some areas of a jurisdiction, and limits on parking requirements related to ADUs. More recent bills reduce the time to review and approve ADU applications to 60 days, remove lot size requirements and replacement parking space requirements and require local jurisdictions to permit junior ADUs. AB 68 allows an ADU and a junior ADU to be built on a single-family lot, if certain conditions are met. The State has also removed owner-occupancy requirements for ADUs, created a tiered fee structure that charges ADUs based on their size and location, prohibits fees on units of less than 750 square feet, and permits ADUs at existing multi-family developments. AB 671 requires the Housing Element to include plans to incentivize and encourage affordable ADU rentals. AB 3182 prohibits homeowner's associations from imposing rental restrictions on ADUs.
- **Density Bonus and Development Incentives: Assembly Bill 1763 (2019) and Assembly Bill 2345 (2020).** AB 1763 amended California's density bonus law to authorize significant development incentives to encourage 100 percent affordable housing projects, allowing developments with 100 percent affordable housing units to receive an 80 percent density bonus from the otherwise maximum allowable density on the site. If the project is within half a mile of a major transit stop, the City may not apply any density limit to the project, and it can also receive a height increase of up to three additional stories (or 33 feet). In addition to the density bonus, qualifying projects will receive up to four regulatory concessions. Additionally, the City may not impose minimum parking requirements on projects with 100 percent affordable housing units that are dedicated to special needs or supportive housing. AB 2345 created additional density bonus incentives for affordable housing units provided in a housing development project. It also requires that the annual report include information regarding density bonuses that were granted.
- **Housing Crisis Act of 2019: Senate Bill 330 (2019).** SB 330 enacts changes to local development policies, permitting, and processes that will be in effect through January 1, 2025. SB 330 places new criteria on the application requirements and processing times for housing developments; prevents localities from decreasing the housing capacity of any site, such as through downzoning or increasing open space requirements, if such a decrease

would preclude the jurisdiction from meeting its RHNA housing targets; prohibits localities from imposing a moratorium or similar restriction or limitation on housing development; prevents localities from establishing non-objective standards; and requires that any proposed demolition of housing units be accompanied by a project that would replace or exceed the total number of units demolished. Additionally, any demolished units that were occupied by lower-income households must be replaced with new units affordable to households with those same income levels. The City's processing procedures related to SB 330 are described further in Appendix B.

- **Surplus Land Act Amendments: Assembly Bill 1486 and AB 1255 (2019).** AB 1486 refines the Surplus Land Act to provide clarity and further enforcement to increase the supply of affordable housing. The bill requires the City to include specific information relating to surplus lands in the Housing Element and Housing Element Annual Progress Reports, and to provide a list of sites owned by the city or county that have been sold, leased, or otherwise disposed of in the prior year. AB 1255 requires the City to create a central inventory of surplus and excess public land each year. The City is required to transmit the inventory to the Department of Housing and Community Development (HCD) and to provide it to the public upon request.
- **Housing Impact Fee Data: Assembly Bill 1483 (2019).** AB 1483 requires the City to publicly share information about zoning ordinances, development standards, fees, exactions, and affordability requirements. The City is also required to update such information within 30 days of changes. This Housing Element describes governmental constraints on the production of housing, including a look at zoning requirements, development standards, fees, exactions, and affordability requirements. Changes in requirements made during the Housing Element planning period will also be reported as part of the City's annual Housing Element Progress Report.
- **SB 6, Beall (Chapter 667, Statutes of 2019).** Jurisdictions are required to prepare the housing site inventory on forms developed by HCD and send an electronic version with their adopted housing element to HCD. HCD will then send those inventories to the Department of General Services by December 31 of each year.
- **Housing Opportunity and More Efficiency (HOME) Act: Senate Bill 9, Atkins (Chapter 162, Statutes of 2021).** Effective January 1, 2022, SB 9 requires the City to allow up to two residential dwelling units and residential lot splits in single-family zones. SB 9 allows for reduced standards, such as setbacks, minimum parcel dimensions, and parking. The City must apply objective zoning standards that do not preclude construction of up to two 800-square-foot units. To prevent displacement, the State does not allow SB 9 projects to demolish any affordable or rent controlled housing, or housing that has been occupied by a tenant within the last three years. Projects that meet the qualifying criteria and requirements must be ministerially approved and are not subject to CEQA review.

1.4 GENERAL PLAN CONSISTENCY

The Housing Element is the only chapter in a general plan with statutorily prescribed timelines for completion. To ensure internal consistency among all General Plan elements, the City will update its Land Use Element to be consistent with Housing Element in terms of land uses, population, and housing projections. In addition, the City will make updates to the Safety Element consistent with Gov. Code Section 65302 and 65302.5. Annually, during the preparation of the Annual Performance Report to HCD, the City will review any potential changes to other Elements of the General Plan to ensure ongoing consistency. This includes any time that General Plan updates are being proposed.

1.5 HOUSING ELEMENT ORGANIZATION

Consistent with State law, this Housing Element consists of the following major components:

1. **Introduction [Chapter 1].** Explains the purpose, process, and contents of the Housing Element.
2. **Housing Needs [Chapter 2].** Presents an analysis of population and employment trends, the city's fair share of regional housing needs, household characteristics, and the condition of the housing stock.
3. **Affirmatively Furthering Fair Housing Summary [Chapter 3].** Summarizes the Assessment of Fair Housing and explains how the City intends to proactively address affirmatively furthering fair housing (AFFH) considerations through our Housing Element programs.
4. **Constraints [Chapter 4].** Reviews governmental constraints, including land use controls, fees, and processing requirements, as well as non-governmental constraints, such as construction costs, availability of land and financing, physical environmental conditions, and units at risk of conversion, which may impede the development, preservation, and maintenance of housing.
5. **Resources [Chapter 5].** Identifies resources available for the production and maintenance of housing, and discussion of federal, state, and local financial resources and programs available to address the City's housing goals.
6. **Adequate Sites [Chapter 6].** Describes and maps the land suitable for residential development to accommodate the City's Regional Housing Needs Allocation (RHNA) and describes the anticipated development on those sites.
7. **Housing Goals, Policies, and Programs [Chapter 7].** Identifies the City's housing goals and provides policies and programs to address Belmont's housing needs.

Given the detail and lengthy analysis in developing the Housing Element, supporting background material is included in the following appendices:

- Appendix A: Housing Needs Report

- Appendix B: Sites Inventory
- Appendix C: Assessment of Fair Housing Report
- Appendix D: Review of Housing Element Past Performance Program Accomplishments
- Appendix E: Outreach

1.6 PUBLIC PARTICIPATION SUMMARY

OVERVIEW

The Housing Element is an important document that will shape the future of our community. Therefore, it is important that it reflects the vision of the people who make the City of Belmont special. To accomplish this, Belmont developed and implemented an outreach plan designed to reach as many community members who live and work here as possible. For some of the community outreach activities, Belmont partnered with other San Mateo County jurisdictions for a first-of-its-kind countywide outreach effort, through an award-winning collaboration called "21 Elements." A summary of public participation and community outreach activities, along with key takeaways, are included below.

WEBSITE AND SOCIAL MEDIA

- Belmont developed a city website at www.belmont.gov/housingelement to host all information and resources related to the Housing Element update. The webpage hosted an archive of past Belmont Housing Elements, recordings and materials from all community engagement activities, and multiple ways for people to provide feedback, including a virtual sites map. The City's homepage also included a banner linking visitors to the Housing Element Webpage.
- Belmont participated in and helped shape the "Let's Talk Housing" regional housing collaboration. Let's Talk Housing developed a countywide website available in five languages, a Belmont webpage (www.letstalkhousing.org/belmont) detailing the City's timeline, engagement activities and resources that also linked to the Belmont website, videos about the process in several languages, and a social media presence. As of February 2022, the website has been visited more than 17,000 times, with more than 20 percent from mobile devices.
- Belmont created a dedicated e-notification list to keep interested parties informed about the Housing Element update process.
- Belmont utilized a variety of social media platforms to inform the community about the housing update process, solicit community survey responses.

COMMUNITY MEETINGS

Belmont participated in several meetings and webinars in partnership with 21 Elements, including the following.

- **Introduction to the Housing Element** – A housing element overview with breakout discussion rooms that was part of a series of introductory meetings attended by more than 1,000 community members countywide.
- **All About RHNA** – A webinar offering a deep dive into the RHNA allocation process and the opportunity sites methodology.
- **Stakeholder Listening Sessions** – Four meetings where staff from all County jurisdictions could listen to and hold breakout discussions with housing stakeholder groups arranged by topic. More than 30 groups participated.
- **Creating an Affordable Future** – A four-part webinar series to help educate community members about local housing issues.

Belmont coordinated and hosted numerous public meetings to review components of the Housing Element update; all the following meetings' recordings and materials can be found on the City's Housing Element webpage.

- City Council Public Study Session (May 11, 2021) – An introduction to the Belmont Housing Element.
- City Council Public Meeting (January 11, 2022) – An update on the Housing Element and housing development activity review.
- Affirmatively Furthering Fair Housing Workshop (March 23, 2022) – A virtual community meeting to review AFFH and new Housing Element requirements.
- City Council Public Study Session (April 26, 2022) – A review of draft housing sites, AFFH assessment, and draft Housing Element programs.
- Planning Commission Public Study Session (May 17, 2022) – A review of draft housing sites, AFFH assessment, and draft Housing Element programs.
- Housing Element Community Workshop (June 27, 2022) – A highly attended virtual meeting to review the Housing Element update and the connection between housing growth and transportation, parks, and other land use planning efforts within the city.
- Planning Commission Draft Housing Element and EIR Review (July 19, 2022) – Available to attend both in-person and virtually.
- City Council Draft Housing Element and EIR Review (July 26, 2022) – Available to attend both in-person and virtually, with speech and hearing-impaired services available by request.
- Planning Commission Housing Element and EIR Review (January 17, 2023) – Recommendation to the City Council to adopt the Housing Element and certify the EIR. Available to attend both in-person and virtually, with speech and hearing-impaired services available by request.

- City Council Public Meeting Certifying the Final Programmatic EIR and adoption of the 2023-2031 Housing Element (January 30, 2023) –Available to attend both in-person and virtually, with speech and hearing-impaired services available by request.
- City Council Public Study Session (September 26, 2023) – This presentation focused on reviewing additional policies related to AFFH and provide an update on the revisions made in response to the April 2023 HCD comment letter.
- City Council Public Study Session (March 26, 2024) – This presentation focused on new Housing Mobility programs in response to HCD comments that will support more housing opportunities across the city, specifically targeting low–density neighborhoods in response to the December 2023 HCD comment letter.

OTHER OUTREACH STRATEGIES

- **Community Mailer Postcard #1** – Direct postcard mailer in March 2022 to all residential units in Belmont introducing the Housing Element update, promoting the online AFFH survey, and promoting the March AFFH Community Workshop. The postcard was also distributed at the Belmont Library and Twin Pines Senior & Community Center; invitation for comments in Spanish included.
- **AFFH Fair Housing Online Survey** – To gather insight on community needs and priorities. Survey link provided in direct postcard mailer to all residential units in Belmont, shared on social media (Facebook, NextDoor, Instagram, Twitter), City website, Citywide Weekly Update, and citywide utility bill insert mailer; survey made available in English, Spanish, simplified Chinese, Tagalog, and Vietnamese; 174 survey responses.
- **Community Mailer Postcard #2** – Direct postcard mailer to all residential units advertising where to find the draft Housing Element and Environmental Impact Review (EIR) and promoting the June community housing workshop. The postcard was also distributed at the Belmont Library and Twin Pines Senior & Community Center; invitation for comments in Spanish included.
- **Citywide Utility Bill Inserts** – The City designed and distributed an information flier with the with quarterly municipal sewer utility bill that included information about the Housing Element Update, a short URL link to the AFFH fair housing survey, housing element web address and housing email address for people to provide comments.

SPECIAL NEEDS COMMUNITY OUTREACH EFFORTS

During the Housing Element development process, Belmont made diligent efforts to engage all economic segments of the Belmont community, including special needs populations. These efforts are details above, and summarized below:

- **Belmont Senior Residents.** One of the largest special needs housing populations in Belmont are seniors, with an aging senior population, several senior living facilities located in Belmont and a robust senior community center located near Belmont City Hall. During the Housing Element development process, the City made sure that both the Fair Housing

community mailer and the Public Notice mailer were delivered to all residential tenants in Belmont. The City reached out to senior living facilities to ensure distribution of materials to residents who might not otherwise be on community or property owner mailing lists. The City made sure to provide printed materials at the Belmont Senior Center grab-and-go lunches that were extremely well attended during the COVID-19 pandemic closure of other traditional community gathering spaces.

- **Translation Services.** In order to ensure non-English speaking residents had opportunities to participate in the community engagement process, the City made sure to include both Spanish and simplified Chinese translation on printed and digital communications that invited residents to provide input on the Housing Element development process in their language of preference (see example below). Written translation services were provided by ABAG. The City of Belmont Housing Element webpage continues to include verbiage in Spanish offering residents to provide written feedback in their language of preference.
- **Resident Housing Surveys.** The City of Belmont participated in the ABAG Regional Housing Technical Assistance (RHTA) online housing survey which was made available in English, Spanish, Tagalog, Vietnamese, and simplified Chinese. Belmont also participated in a Countywide Fair Housing Survey that was available online, in both Spanish and English, in a format accessible to screen readers, and promoted through City communications and social media as well as through partner networks. A total of 2,382 residents participated, 89 were from Belmont.
- **Equity Advisory Group.** Belmont participated in an Equity Advisory Group with 21 Elements to ensure outreach was designed to meet with community stakeholders where they were at as much as possible. The Equity Advisory Group consisting of 18 organizations across San Mateo County that provided feedback on outreach and materials, and shared information about the Housing Element update and how to participate in the process with the communities they serve. Belmont has provided direct Housing Element updates, meeting invitations, and other related Housing Element development materials to various housing service providers who have been engaged with the City during the two-year process. See above for more details on the Equity Advisory Group effort and community participants.
- **Accessible City Housing Element Website.** The City created a Housing Element update website that was mobile friendly, with accessibility features and in multiple languages, recognizing that lower-income residents, young adults, and people of color are more likely to use their phones to access information about the Housing Element process.

KEY TAKEAWAYS

Below is a summary of key takeaways that emerged throughout the outreach process.

- **Housing is personal.** People often have differing views on housing because it is a very personal issue tied to feelings of safety, belonging and identity. Often the comments reflected people's current housing situation. Those with safe, stable housing that they can afford were more concerned with potential change. Those without were more interested in

bolder policies and more housing generally. Many people shared meaningful stories of being priced out of their communities or of their children not being able to live in the community where they grew up.

- **The price of housing is a major concern.** Through surveys responses and people who spoke during community meetings, many Belmont residents voiced concerns about the high cost to rent or buy a home today, either for themselves, friends, or family. It is an issue that touches a lot of lives.
- **More housing is needed.** Generally, participants agreed that Belmont needs more housing, particularly affordable housing. However, there are diverging views on how to accomplish this, where housing should go, and what it should look like.
- **Single-family neighborhoods are polarizing.** While some people voiced their interest in up-zoning sites near single-family neighborhoods, a majority of Belmont homeowners want to protect single family neighborhoods and the property investments they have made.
- **Affordable housing is a top concern.** Many felt that more needed to be done to promote affordable housing. They also felt that developers should be eligible for incentives and opportunities that make them more competitive.
- **Better information resources**. People wanted to know how to find affordable housing in their communities and navigate the process of applying for it.
- **Issues are connected**. Transportation, infrastructure like storms and sewer facilities, adequate park and recreation space, climate change, access to living wage jobs and education opportunities are all tied to housing and quality of life. These issues are not siloed in people's lives and there is a desire to address them in interconnected ways. The June 2022 community workshop included Belmont staff from Housing, Planning, Public Works, and Parks and Recreation to provide comprehensive information about housing growth in Belmont.
- **Regional input matters but there's more to figure out.** It was valuable to build a broader sense of community and share resources at the countywide level. However, it was more important to this process to engage non-resident community members on jurisdiction-specific input. The City will continue to utilize some of the Housing Element engagement strategies for future community engagement efforts to insure inclusion outreach.
- **Diversity in participation was a challenge.** Despite partnering with organizations to engage with the hardest to reach communities and providing multilingual outreach, achieving diversity in participation was challenging. In the wake of Covid-19, organizations already operating on limited resources were focused on supporting immediate needs, while the added stresses of life coupled with the digital divide added additional barriers for many.

DRAFT HOUSING ELEMENT PUBLIC REVIEW PERIODS

The City has received extensive community input over the two years related to various aspects of the Housing Element, including the CEQA review process. The City has worked diligently to respond to comments and concerns and to make adjustments to the draft document based on that input. The formal 30-day public review period of the Draft Housing Element ran from July 1, 2022 to August 1, 2022, during which 88 written comments were received. In addition, during the public review period, both the Planning Commission (July 19th) and the City Council (July 26) held public meetings to review the full draft Housing Element and received substantial public comment. During both public meetings, over 45 speakers provided comments and feedback on the plan.

Housing Element study sessions were also held by the City Council (April 26) and Planning Commission (May 17th), during which 31 written comments were received. One additional email comment was received following the AFFH community workshop held in March 2022.

On July 26, 2022, the Belmont City Council directed staff to route the draft Housing Element to the State Department of Housing and Community Development (HCD), following incorporation of the Belmont Planning Commission's recommended revisions. HCD then provided written comments to the City and in response, City staff incorporated redline revisions to the Housing Element documents.

On January 30, 2023, following the Planning Commission's recommendation, the Belmont City Council held a public hearing to certify the final Programmatic Environmental Impact Report (EIR) and adopt the 2023-2031 Housing Element. By February 1, 2023, a CEQA Notice of Determination was filed, and the Housing Element was formally submitted to HCD. On April 3, 2023, HCD provided written comments to the City which resulted in an additional revision to the draft Housing Element, including policies added to the Housing Element were reviewed by the City Council at their September 26, 2023 meeting. The revised Housing Element was submitted to HCD for review on October 19, 2023 following a 7-day public review period.

On December 18, 2023, HCD provided additional written comments to the City. Additional Housing Mobility programs added to the Housing Element were reviewed by the City Council at their March 26, 2024 meeting. A subsequent draft Housing Element was prepared in response to HCD comments which included a major re-organization and re-formatting to improve the readability of the document.

HOW WE INCORPORATED WHAT WE HEARD INTO THE PLAN

The outreach and community engagement conducted played an important role in the development of the goals, policies, and programs within the 2023-2031 Housing Element. The overarching challenge of housing affordability and availability was heard often. In addition to addressing concerns related to fair housing and ensuring compliance with new laws, and in response to the public comments made during and before the public review, multiple additional

revisions, clarifying edits, and corrections were made to prior to submittal to HCD. Those revisions and updates include the following.

- **Service Commercial Sites —** In response to significant community concerns about the proposal to rezone sites zoned Service Commercial along Old County Road to allow housing development, 20 sites were removed from the inventory resulting in a reduction of 629 housing units. Belmont officials acknowledged that housing development may still occur at these locations, but a proposed change of land use would be better analyzed by the City and community when accompanied by a specific housing development proposal.
- **Building Heights —** The City received many written and verbal comments objecting to increasing building heights in the Corridor Mixed Use (CMU) and Village Station Core (VCS) zoning districts. In response, this plan does not propose any building height increases and they are not necessary to accommodate Belmont's RHNA allocation.
- **Special Needs Housing —** Additional data on persons with developmental or intellectual disabilities has been included, and several programs recommended by regional housing advocates are included that address concerns about ensuring housing opportunities for this special needs group, many of whom are extremely low-income.
- **BVSP Zoning —** Based on feedback from housing developers on the success of the Belmont Village Specific Plan (BVSP) zoning, which does not include a maximum density metric, similar zoning modifications were extended throughout the El Camino Real transit corridor. The Corridor Mixed Use zoning district was modified to increase the allowable floor area ratio and eliminate the maximum density metric. In response to community comments, the City also expanded the objective form-based urban design requirements from the BVSP to the CMU zoning district. These zoning code amendments were completed in January 2024.
- **Traffic and Parking —** In response to community concerns related to traffic and parking in residential neighborhoods adjacent to the priority development areas, the City hosted a community listening session on June 27, 2022 that was attended by staff from several City departments, including the Community Development Director, the Parks and Recreation Director, and the Public Works Director. The community meeting provided an opportunity for residents to share their concerns directly with City officials. The meeting also provided an opportunity for Public Works staff to provide an update on streets and roads infrastructure projects either planned or in progress.
- **Opportunity Sites —** Many of the public comments received suggested that more housing opportunity sites should be proposed in other locations in Belmont, primarily suggesting that more sites west of El Camino Real should be included on the housing sites inventory. In response to these comments, the City enhanced community outreach and information materials to better explain the site selection methodology, emphasizing that multi-family housing sites should have proximity to public transit and other resources that are found in the City's priority development area (PDA). In addition, the draft Housing Element Environmental Impact Report (EIR) notes that vehicle miles traveled (VMT), the key metric for determining the impact of new development on traffic, is substantially lower on sites

located near transit and along major thoroughfares. Furthermore, the Housing Element includes several programs as part of the City's Fair Housing Action Plan that encourage the construction of new housing units in predominately single-family neighborhoods throughout the city.

- **Development Project Comments** — The City received a significant number of comments related to a proposed housing development located at 580 Masonic Way, a pipeline project site included on the sites inventory. The project is an allowed use under current zoning and the project application submittal is currently under review. To address concerns raised related to this project, the City created an updated project information website to distribute current and accurate project details to the community.

2

HOUSING NEEDS

The Plan Bay Area 2050 Final Blueprint[1] forecasts that the nine-county Bay Area will add 1.4 million new households between 2015 and 2050. For the eight-year timeframe covered by this Housing Element, the Department of Housing and Community Development (HCD) has identified the region's housing need as 441,176 units. The total number of housing units assigned by HCD is separated into four income categories that cover housing types for all income levels, from extremely low-income households to market rate housing.

Every year, the US Department of Housing and Urban Development (HUD), in conjunction with the State of California, establish income categories based on the median income in each county. Based on new requirements for the completion of the Housing Element, jurisdictions must now report on the following categories of income.

- Extremely Low-Income: 0-30% of Area Median Income, or AMI
- Very Low-Income: 30-50% AMI
- Low-Income: 50-80% AMI
- Moderate-Income: 80-120% AMI
- Above Moderate-Income: 120%+ AMI

Table 2-1 illustrates the income categories for San Mateo County in 2023. The median income for a family of four is $175,000.

The Regional Housing Needs Determination (RHND) is based on population projections produced by the California Department of Finance (DOF) as well as adjustments that incorporate the region's existing housing need. The adjustments result from recent legislation requiring HCD to apply additional adjustment factors to the baseline growth projection from the DOF, for the regions to get closer to healthy housing markets. To this end, adjustments

[1] Plan Bay Area 2050 is a long-range plan charting the course for the future of the nine-county San Francisco Bay Area. It covers four key issues: the economy, the environment, housing and transportation.

TABLE 2-1: INCOME LIMITS FOR SAN MATEO COUNTY (2023)

Number of Persons in Household		1	2	3	4	5	6	7	8
San Mateo County Area Median Income: $175,000	Acutely Low-	$18,400	$21,000	$23,650	$26,250	$28,350	$30,450	$32,550	$34,650
	Extremely Low-	$39,150	$44,750	$50,350	$55,900	$60,400	$64,850	$69,350	$73,800
	Very Low-Income	$65,250	$74,600	$83,900	$93,200	$100,700	$108,150	$115,600	$123,050
	Low-Income	$104,400	$119,300	$134,200	$149,100	$161,050	$173,000	$184,900	$196,850
	Median-Income	$122,500	$140,0000	$157,500	$175,000	$189,000	$203,000	$217,000	$231,000
	Moderate-Income	$147,000	$168,000	$189,000	$210,000	$226,800	$243,600	$260,400	$277,200

Source: State of California Department of Housing and Community Development (HCD), June 6, 2023, https://www.hcd.ca.gov/sites/default/files/docs/grants-and-funding/income-limits-2023.pdf.

focus on the region's vacancy rate, level of overcrowding and the share of cost burdened households and seek to bring the region more in line with comparable ones.[2] These new laws governing the methodology for how HCD calculates the RHND resulted in a significantly higher number of housing units for which the Bay Area must plan compared to previous RHNA cycles.

Almost all jurisdictions in the Bay Area received a larger RHNA this cycle compared to the last cycle, primarily due to changes in state law that led to a considerably higher RHND compared to previous cycles. The allocation that Belmont received from the Draft RHNA Methodology is broken down by income category as follows:

TABLE 2-2: FINAL REGIONAL HOUSING NEEDS ALLOCATIONS

Income Group	Belmont Units	San Mateo County Units	Bay Area Units	Belmont Percent	San Mateo County Percent	Bay Area Percent
Very Low-Income (<50% of AMI)	488	12,196	114,442	27.3%	25.6%	25.9%
Low-Income (50%-80% of AMI)	281	7,023	65,892	15.7%	14.7%	14.9%
Moderate-Income (80%-120% of AMI)	283	7,937	72,712	15.9%	16.6%	16.5%
Above Moderate-Income (>120% of AMI)	733	20,531	188,130	41.1%	43.1%	42.6%
Total	**1,785**	**47,687**	**441,176**	**100.0%**	**100.0%**	**100.0%**

Source: Association of Bay Area Governments (ABAG) Final Regional Housing Needs Allocations Plan, adopted on December 16, 2021 and approved by California Housing and Community Development on January 12, 2022.

2.1 DEMOGRAPHICS AND HOUSING NEEDS

The following are key facts regarding the city's demographic data and housing needs and issues from the demographic report, which may be found in Appendix A.

[2] For more information on HCD's RHND calculation for the Bay Area, see this letter sent to ABAG from HCD on June 9, 2020: https://www.hcd.ca.gov/community-development/housing-element/docs/abagrhna-final060920(r).pdf.

- **Population** – Generally, the population of the Bay Area continues to grow because of natural growth and because the strong economy draws new residents to the region. The population of Belmont increased by 6.7% from 2000 to 2020, which is below the growth rate of the Bay Area.
- **Age** – In 2019, Belmont's youth population under the age of 18 was 6,233 and senior population 65 and older was 4,538. These age groups represent 23.0% and 16.7%, respectively, of Belmont's population.
- **Race/Ethnicity** – In 2020, 53.9% of Belmont's population was White while 1.0% was African American, 28.3% was Asian, and 12.1% was Latinx. Proportionally, Belmont has a lower overall percentage of people of color than the Bay Area as a whole (49.9%).[3]
- **Employment** – Belmont residents most commonly work in the *Financial & Professional Services* industry. From January 2010 to January 2021, the unemployment rate in Belmont decreased by 3.0 percentage points. Since 2010, the number of jobs located in the jurisdiction increased by 560 (9.5%). Additionally, the jobs-household ratio in Belmont has decreased from 0.75 in 2002 to 0.62 jobs per household in 2018.
- **Number of Homes** – The number of new homes built in the Bay Area has not kept pace with the demand, resulting in longer commutes, increasing prices, and exacerbating issues of displacement and homelessness. The number of homes in Belmont increased, 0.6% from 2010 to 2020, which is *below* the growth rate for San Mateo County and *below* the growth rate of the region's housing stock during this time period.
- **Home Prices** – A diversity of homes at all income levels creates opportunities for all Belmont residents to live and thrive in the community.
  - *Ownership* – The largest proportion of homes had a value in the range of $1M-$2M in 2019. Home prices increased by 123.6% from 2010 to 2020.
  - *Rental Prices* – The typical contract rent for an apartment in Belmont was $2,250 in 2019. Rental prices increased by 76.8% from 2009 to 2019. To rent a typical apartment without cost burden, a household would need to make $90,040 per year.[4]
- **Housing Type** – It is important to have a variety of housing types to meet the needs of a community today and in the future. In 2020, 58.0% of homes in Belmont were single family detached, 6.0% were single family attached, 3.1% were small multi-family (2-4 units), and 32.9% were medium or large multi-family (5+ units). Between 2010 and 2020, the number of single-family units increased more than multi-family units. Generally, in Belmont, the

[3] The Census Bureau's American Community Survey accounts for ethnic origin separate from racial identity. The numbers reported here use an accounting of both such that the racial categories are shown exclusive of Latinx status, to allow for an accounting of the Latinx population regardless of racial identity. The term Hispanic has historically been used to describe people from numerous Central American, South American, and Caribbean countries. In recent years, the term Latino or Latinx has become preferred. This report generally uses Latinx, but occasionally when discussing US Census data, we use Hispanic or Non-Hispanic, to clearly link to the data source.
[4] Note that contract rents may differ significantly from, and often being lower than, current listing prices.

share of the housing stock that is detached single family homes is above that of other jurisdictions in the region.

- **Displacement/Gentrification** – According to research from The University of California, Berkeley, no households in Belmont live in neighborhoods that are susceptible to or experiencing displacement, and none live in areas at risk of or undergoing gentrification. 45.5% of households in Belmont live in neighborhoods where low-income households are likely excluded due to prohibitive housing costs.
- **Neighborhood** – All residents in Belmont live in neighborhoods identified as "Highest Resource" or "High Resource" areas by state-commissioned research, while none of residents live in areas identified by this research as "Low Resource" or "High Segregation and Poverty" areas. These neighborhood designations are based on a range of indicators covering areas such as education, poverty, proximity to jobs and economic opportunities, low pollution levels, and other factors.[5]
- **Special Housing Needs** – Some population groups may have special housing needs that require specific program responses, and these groups may experience barriers to accessing stable housing due to their specific housing circumstances. In Belmont, 9.0% of residents have a disability of any kind and may require accessible housing. Additionally, 5.2% of Belmont households are larger households with five or more people, who likely need larger housing units with three bedrooms or more. 6.7% of households are female-headed families, which are often at greater risk of housing insecurity.

2.2 HOUSING STOCK CHARACTERISTICS AND NEEDS

HOUSING COSTS AND COST BURDEN

HUD considers housing to be affordable for a household if the household spends less than 30% of its income on housing costs. A household is considered "cost-burdened" if it spends more than 30% of its monthly income on housing costs, while those who spend more than 50% of their income on housing costs are considered "severely cost-burdened." Low-income residents are the most impacted by high housing costs and experience the highest rates of cost burden. In In Belmont, 23.6% of renters are cost burdened (spending 30% to 50% of their income on housing) compared to 12.5% of those who own. In addition, 20.7% of renters are severely cost-burdened (spending 50% or more of their income on housing), while only 7.5% of owners fall into this category. Of all households in Belmont, 15% spend 50% or more of their income on housing, while 18.1% spend 30% to 50%. However, these rates vary greatly across income

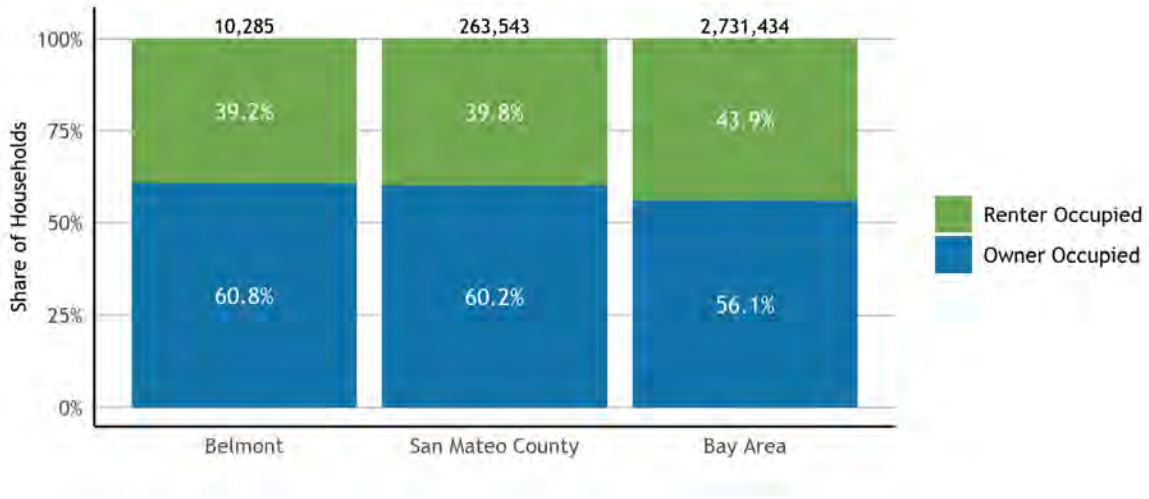
[5] For more information on the "opportunity area" categories developed by HCD and the California Tax Credit Allocation Committee, see this website: https://www.treasurer.ca.gov/ctcac/opportunity.asp. The degree to which different jurisdictions and neighborhoods have access to opportunity will likely need to be analyzed as part of new Housing Element requirements related to affirmatively furthering fair housing. ABAG/MTC will be providing jurisdictions with technical assistance on this topic this summer, following the release of additional guidance from HCD.

categories; for example, 76.4% of Belmont households making less than 30% of AMI spend most of their income on housing. For Belmont residents making more than 100% of AMI, just 0.3% are severely cost-burdened, and 89.9% of those making more than 100% of AMI spend less than 30% of their income on housing.

HOUSING TYPE AND TENURE

The number of residents who own their homes compared to those who rent their homes can help identify the level of housing insecurity, or the ability for individuals to stay in their homes, within a city and region. Generally, renters may be displaced more quickly if prices increase. In Belmont, there are 10,285 housing units, and fewer residents rent (39.2%) than own (60.8%). As seen in Figure 2-1, this is similar to San Mateo County, though in the Bay Area as a whole, a greater percentage rent (43.9%).

Figure 2-1: Housing Tenure



Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25003.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-16.

Homeownership rates often vary considerably across race/ethnicity in the Bay Area and throughout the country. These disparities not only reflect differences in income and wealth but also stem from federal, state, and local policies that limited access to homeownership for communities of color while facilitating homebuying for White residents. While many of these policies, such as redlining, have been formally disbanded, the impacts of race-based policies are still evident across Bay Area communities. For more information on disparities in homeownership across lines of race and age, see *Appendix A: Housing Needs and Appendix C: Assessment of Fair Housing*.

In recent years, most housing produced in the region and across the state has consisted of single-family homes and larger multi-unit buildings. However, some households are increasingly interested in "missing middle housing"—including duplexes, triplexes, townhomes, cottage clusters, and accessory dwelling units (ADUs). These housing types may open more

options across incomes and tenure, from young households seeking homeownership to seniors looking to downsize and age-in-place.

The 2020 Belmont housing stock was made up of 58.0% single-family detached homes, 32.9% multi-family homes with five or more units, 6.0% single-family attached homes, 3.1% multi-family homes with 2 to 4 units, and 0.0% mobile homes. From 2010 to 2020, the housing type that experienced the most growth was *Single-Family Home: Detached*. In Belmont, the largest proportion of the housing stock was built from 1960 to 1979. Since 2010, 1.4% of the current housing stock has been built.

Vacant units constitute 6.5% of Belmont's overall housing stock. The rental vacancy rate stands at 10.0%, while the ownership vacancy rate is 0.8%. Of the vacant units, the most common type of vacancy is *For Rent*.

From 2015 to 2023, Belmont issued permits for 715 housing units. Of these, 71% were for above moderate-income housing, 11% were for moderate-income housing, and 18% were for low- or very low-income housing.

HOUSING CONDITION

Generally, there is limited data on the extent of substandard housing in a community; however, the Census Bureau data measuring a lack of kitchen and plumbing facilities can provide a sense of some substandard conditions that may be present in Belmont. For example, 6.6% of Belmont renters reported lacking a complete kitchen and 0.3% of renters lacked complete plumbing, compared to 0.6% of owners who lack a complete kitchen and 0.0% of owners who lacked complete plumbing. Another measure of housing condition is the age of housing. In general, the older the unit, the greater it can be assumed to need some level of rehabilitation. A general rule in the housing industry is that structures older than 20 years begin to show signs of deterioration and require renovation to maintain their quality. Unless properly maintained, homes older than 50 years can pose health, safety, and welfare problems for occupants. Based on the age of the housing stock, it is estimated that there are approximately 1,311 units in need of some level of rehabilitation in Belmont, representing 12% of the housing stock. It is estimated that nearly all units in need of rehabilitation can be repaired without replacement.

As part of this update, Belmont will establish partnerships with organizations that provide home repairs and energy-efficiency improvements for low-income households (see Program H2.4).

2.3 SPECIAL NEEDS POPULATIONS

This section includes an analysis of Belmont's housing for special needs populations, including large households, female-headed households, seniors, people with disabilities, homeless farmworkers, non-English speakers, and extremely low-income households. To address special

needs housing, the City has included the following programs in *Chapter 7, Housing Goals, Policies, and Programs*:

- Amend the zoning code to define be consistent with state law regulating farmworker housing (Program H4.2).
- Modify the Inclusionary Housing Program to provide pathways for the construction of affordable units that address the needs of residents with extremely low and very low incomes who face very high rates of cost burden in the city (Program H5.3).
- Establish a grant or loan program to incentivize homeowners to construct ADUs affordable to lower income households (targeting special needs populations such as seniors, persons with disabilities, and large households) (Program H5.10).
- Identify areas of the city with the highest potential for the addition of ADUs and JADUs due to sloping lots that create underfloor area prime for conversion to living area. Conduct direct outreach to those property owners and provide technical assistance (targeting special needs populations such as seniors, developmentally disabled persons, and large households) (Program H5.11).

LARGE HOUSEHOLDS

Large households often have different housing needs than smaller households. If a city's rental housing stock does not include larger apartments, large households that rent could end up living in overcrowded conditions. In Belmont, for large households with five or more people, most units (65.2%) are owner-occupied. In 2017, 13.8% of large households were very low-income, earning less than 50% of the area median income (AMI). In addition to overcrowding, large households also often have a cost burden. In Belmont, most large households that are paying too much for housing are lower-income households. Although this is primarily because there are very few large renter households, there are disproportionately fewer large renter households than large owner-occupied households. Large families are generally served by housing units with three or more bedrooms, of which there are 6,175 units in Belmont. Among these large units with three or more bedrooms, 10.8% are renter-occupied while 89.2% are owner occupied.

FEMALE-HEADED HOUSEHOLDS

Households headed by one person are often at a greater risk of housing insecurity. This is particularly true of female-headed households, where the female may be supporting children or other family with a single income. In Belmont, the largest proportion of households is Married-couple Family Households (61.8%), while Female-Headed Households make up 6.7% of households.

Female-headed households with children may face elevated housing challenges, with pervasive gender inequality resulting in lower wages for women. Moreover, the added need for childcare can make finding a home that is affordable more challenging. In Belmont, 5.3% of female-headed households with children fall below the Federal Poverty Line, while 2.0% of female-

headed households without children live in poverty. The 2015-2019 American Community Survey showed that single parents comprised approximately 9.7% of Belmont households. Of these, the vast majority were female-headed, single-parent households (68.3% of single-parent households). Female-headed families have a higher incidence of poverty when compared to all households and are more likely renters than owners. Of the female headed households in Belmont, 57.6% were renters.

SENIORS

Senior households often experience a combination of factors that can make accessing or keeping affordable housing a challenge. They often live on fixed incomes and are more likely to have disabilities, chronic health conditions, and reduced mobility. Seniors who rent may be at an even greater risk for housing challenges than those who own due to income differences between these groups. The largest proportion of senior households who rent make up 0%-30% of AMI, while the largest proportion of senior households who are homeowners falls in the income group Greater than 100% of AMI. Approximately 27.3% of households in Belmont are senior households. While many earn incomes over 100% of median income, 51% earns incomes less than 80% of median. Cost burden is prevalent amongst elderly households, especially those earning the lowest incomes. For example, although extremely low-income senior households represent 21% of total senior households, they represent more than 49.5% of senior households with a cost burden. Of all senior households, 15.8% are cost-burdened, and 22.9% are severely cost-burdened.

PEOPLE WITH DISABILITIES

People with disabilities face additional housing challenges. Encompassing a broad group of individuals living with a variety of physical, cognitive, and sensory impairments, many people with disabilities live on fixed incomes and need specialized care, yet often rely on family members for assistance due to the high cost of care. In Belmont, 9% of people have a disability of any kind. In Belmont and elsewhere, persons with disabilities have a wide range of different housing needs, which vary depending on the type and severity of the disability as well as personal preference and lifestyle. Physical, mental, and/or developmental disabilities may prevent a person from working, restrict one's mobility, or make it difficult to care for oneself.

HOMELESSNESS

Homelessness remains an urgent challenge in many communities across the state, reflecting a range of social, economic, and psychological factors. Homelessness is disproportionately experienced by people of color, people with disabilities, those struggling with addiction, and those dealing with traumatic life circumstances. The San Mateo County Human Services Agency (HSA), in close collaboration with community partners, conducts the bi-annual One Day Homeless Count and Survey (count). The purpose of the count is to gather and analyze information to help the community understand homelessness in the County.

The 2022 One Day Homeless Count and Survey counted found 13 unsheltered individuals in the City of Belmont. This was an increase from 2019, when seven homeless individuals were located, but lower than in 2013, when 43 people were counted. For more information, see https://www.smcgov.org/hsa/2022-one-day-homeless-count.

The County of San Mateo is the primary coordinator of services for people experiencing homelessness in the County. The City of Belmont will continue to provide support for strategic initiatives to help address the challenges faced by people experiencing homelessness in the city, as well as to support the implementation of the County's 2022-2025 Continuum of Care (COC) Strategic Plan on Homelessness.

FARMWORKERS

Farmworkers are traditionally defined as persons whose primary incomes are earned through seasonal or permanent agricultural work. Farmworkers have special housing needs because they earn lower incomes than many other workers. In many parts of Northern California, agriculture production is an important contribution to local economies, especially in Napa and Sonoma Counties. In Belmont, there are no known farmworkers, and it does not have any farm housing or land remaining in agricultural use. Furthermore, no land within Belmont is designated for agricultural use. According to American Community Survey's 2019 five-year data, there could be an estimated 30 farmworkers in Belmont; however, the margin of error for this figure is +/- 42, indicating this information is unreliable. Even at 30 farmworkers, this represents only 0.1% of the total population in the city. Due to the low number of potential agricultural workers in the city, the housing needs of migrant and/or farmworker housing need can be met through general affordable housing programs. As there are no known farmworkers in Belmont, there were no reported students of migrant workers in the 2019-20 school year.

NON-ENGLISH SPEAKERS

California has long been an immigration gateway to the U.S., which means many languages are spoken throughout the Bay Area. Since learning a new language is universally challenging, it is common for residents who have immigrated to the U.S. to have limited English proficiency. In Belmont, 3.6% of residents five years and older identify as speaking English "not well" or "not at all," which is below the percentage in San Mateo County. The City provides an option on its website that allows it to be translated into other languages. In addition, the City is making an enhanced effort to provide translations on public notices that are sent via mail.

EXTREMELY LOW-INCOME HOUSEHOLDS

Despite the economic and job growth experienced throughout the region since 1990, the income gap has continued to widen. California is one of the most economically unequal states in the nation, and the Bay Area has the highest income inequality between high- and low-income households in the state. In Belmont, 59.5% of households make more than 100% of the Area Median Income (AMI), compared to 11.1% making less than 30% of AMI, which is considered extremely low-income.

Regionally, more than half of all households make more than 100% AMI, while 15% make less than 30% AMI. In San Mateo County, 30% AMI is the equivalent to the annual income of $44,000 for a family of four. Many households with multiple wage earners—including food service workers, full-time students, teachers, farmworkers, and healthcare professionals—can fall into lower AMI categories due to relatively stagnant wages in many industries.

State law requires jurisdictions to estimate the number of extremely low-income households–those earning less than 30% of median income.

Extremely low-income (ELI) households are more likely to experience housing problems and cost burden. In Belmont, 11.1% of households are ELI. These households make up 5.9% of owners and 12.6% of renters. ELI renter and ELI owner households experience about the same level of cost burden 70.7% and 70.8%, respectively of their income going towards housing costs.

While White households make up the bulk of the ELI households (61.2%), many households of color also earn extremely low incomes. For example, Asian/Pacific Islander households make up 15.7% of extremely low-income households in Belmont, while Hispanic/Latinx make up 12.7%% (while only representing 8.7% of the total population). Racial/ethnic, income, and housing problem demographics are further described in *Appendix D, Assessment of Fair Housing*, of this Housing Element.

2.4 UNITS AT RISK OF CONVERSION TO MARKET RATE

State law requires that each city provide analysis and programs for preserving existing affordable housing units that were developed with public subsidies. Units at risk of conversion are those units in which the restrictions, agreements, or contracts to maintain the affordability of the units expire or are otherwise terminated. At expiration, units may revert to market rate, rendering them no longer affordable to the people living in them. Loss of affordability can occur at the termination of bond funding, the expiration of density bonuses, and other similar local programs.

The potential loss of existing affordable housing units is an important issue to the City due to displacement of lower-income tenants and the limited alternative housing for such persons. It is typically less expensive to preserve the affordability of these units than to subsidize construction of new affordable units due to the inflation of land and construction costs which has occurred since the original development of the affordable housing projects.

The Housing Element includes Program H2.1, Support Retention of Existing Lower-Income Units, which directs the City to continue annually monitoring all units potentially at risk of conversion to market rate

CITY OF BELMONT BELOW-MARKET RATE AND PUBLICLY-ASSISTED HOUSING

Table 2-3 inventories existing below-market rate and publicly-assisted housing units in the City of Belmont in 2023. Assistance to help low-income households afford housing is also

TABLE 2-3: BELOW-MARKET RATE AND PUBLICLY ASSISTED HOUSING UNITS (2023)

Project Name and Address	Building Type	Total Units	Affordable Units	Property Owner	Household Type	Funding Source	Expiration Date
Bonnie Brae Terrace (formerly Lesley Terrace), 2400 Carlmont Dr	Apartment	164	164	Bonnie Brae Terrace, LP	All lower-income groups; Disabled; Seniors	Section 8 (60 units); Program 236 (104 units)	Section 8 2039; others 2031
Horizons, 825 Old County Rd	Apartment	24	24	MidPen Housing	Very low-income Families; Disabled	Section 8; City Housing Successor Loan; Program 202/162	2039
Belmont House, 730 El Camino Real	Group Home	6	6	City of Belmont	Low-income Disabled	City RDA; City Housing Successor	No expiration; City-owned property
Waltermire Apts, 631 Waltermire St	Apartment	10	2	Waltermire St Partners LP	Moderate-income Families	City RDA	2039
Belmont Apts, 800 F Street	Apartment	24	24	Mental Health Association of SMC	Very Low-income Disabled	City RDA; HOME;	2058
Crestview Group Home, 503 Crestview	Group Home	6	6	City of Belmont	Low- and moderate-income Disabled	County CDBG & State deferred loan;	No expiration; City-owned property
Firehouse Square, 1300 El Camino Real	Apartment	66	65	City of Belmont	All lower-income groups;	AHF, County, City, TCAC	2090
Emmett House, 1000 O'Neill	Duplex	2	2	City of Belmont	Moderate income	City RDA	No expiration; City-owned property
Hiller Street Group Home, 803 Hiller St	Group Home	6	6	Family Housing and Adult Resources, Inc.	Very Low-income, disabled	County CDBG deferred loan	Expiration date N/A
North Road Group Home, 901 North Rd	Group Home	8	8	Family Housing and Adult Resources, Inc.	Very Low-income, disabled	County CDBG deferred loan	Expiration date N/A
Sterling Point Ownership BMR, 935 Old County Rd	Townhomes	48	7	Individually owned units	Moderate-income First-time home buyers	City RDA	2039, 2041, 2041, 2041, 2042, 2042, 2042
25 Oxford Place	Single-Family Detached	1	1	Individually owned unit	Moderate-income families	City RDA	2030
41 Oxford Place	Single-Family Detached	1	1	Individually owned unit	Moderate-income families	City RDA	2030
TOTAL		**366**	**316**				

City of Belmont, 2024.

available through the Housing Authority of the County of San Mateo's Section 8 Housing Choice Voucher program which can be used to access units in buildings that are not restricted as below market rate. Based on information from the City's records, there are a total of 106 units that are potentially at risk of conversion, which includes 104 units located in the Bonnie Brae Terrace complex and two single family properties.

Of the remaining units, all are considered at low-medium risk of conversion to market rate. Preservation of at-risk projects can be achieved in a variety of ways, with adequate funding availability. Alternatively, units that are converted to market rate may be replaced with new assisted multi-family units with specified affordability timeframes.

RENTAL ASSISTANCE

State, local, or other funding sources can be used to provide rental subsidies to maintain the affordability of at-risk projects. These subsidies can be structured to mirror the Housing Choice Voucher/Section 8 program, whereby the subsidy covers the cost of the unit above what is determined to be affordable for the tenant's household income (including a utility allowance) up to the fair market value of the apartment. The total annual subsidy to maintain at-risk units is estimated at about $20,000 per unit.

TRANSFER OF OWNERSHIP

If the current organizations managing the units at risk are no longer able to maintain a project, transferring ownership of the affordable units to a nonprofit housing organization is a viable way to preserve affordable housing for the long term. The estimated market value for affordable units that are potentially at high risk of converting to market rate is likely $350,000 per unit.

CONSTRUCTION OF REPLACEMENT UNITS

The construction of new low-income housing can be a means to replace at-risk units, though extremely costly. The cost of developing new housing depends on a variety of factors including density, size of units, construction quality and type, location, land and development costs. Using the Terner Center's research on the cost to develop affordable housing around the Bay Area, the cost to replace any units could be as much as $700,00 per unit.

ENTITIES INTERESTED IN PARTICIPATING IN CALIFORNIA'S FIRST RIGHT OF REFUSAL PROGRAM

An owner of a housing development with restrictions (i.e., is under agreement with federal, state, and local entities to receive subsidies for low-income tenants), may plan to sell their "at-risk" property. HCD has listed qualified entities that may be interested in participating in California's First Right of Refusal Program. If an owner decides to terminate a subsidy contract or prepay the mortgage or sell or otherwise dispose of the assisted housing development, or if the owner has an assisted housing development in which there will be the expiration of rental

restrictions, the owner must first give notice of the opportunity to offer to purchase to a list of qualified entities provided to the owner.

HCD has identified the following six entities that may be interested in participating in California's First Right of Refusal Program in San Mateo County.

- ROEM Development Corporation
- Northern California Land Trust, Inc.
- Housing Corporation of America
- Mid-Peninsula Housing Coalition
- Affordable Housing Foundation
- Alta Housing (previously Palo Alto Housing Corp)

Of these entities, some have worked specifically in Belmont, and others have completed projects in surrounding areas. If a development becomes at risk of conversion to market-rate housing, the City will maintain contact with local organizations and housing providers who may have an interest in acquiring at-risk units and will assist other organizations in applying for funding to acquire at-risk units.

FUNDING SOURCES

A critical component to implementing any of these preservation options is the availability of adequate funding, which can be difficult to secure. In general, Low-Income Housing Tax Credit funding is not readily available for rehabilitation and preservation, as the grant application process is highly competitive and prioritizes new construction. The City's previous ongoing funding source, Low/Moderate Housing Funds available through the Redevelopment Agency, no longer exists due to the dissolution of the Redevelopment Agency more than a decade ago. However, affordable housing impact fees and inclusionary zoning in-lieu fees are a new and successful local funding source. Additional available funding sources that can support affordable housing preservation include sources from the federal and state governments, as well as local and regional funding.

Federal Funding

- HOME Investment Partnerships (HOME) Program
- Project-Based Vouchers (Section 8)
- Section 811 Project Rental Assistance
- Veterans Affairs Supportive Housing (VASH) Vouchers

State Funding

- Affordable Housing and Sustainable Communities (AHSC) Program
- Golden State Acquisition Fund (GSAF)
- Project Homekey
- Housing for a Healthy California (HHC)
- Multi-Family Housing Program (MHP)
- National Housing Trust Fund
- Predevelopment Loan Program (PDLP)

- Permanent Location Housing Allocation (PLHA)

Regional, Local, and Nonprofit Funding

- San Mateo County Affordable Housing Fund
- Housing Successor Agency for the Redevelopment Agency
- Commercial Linkage Fee (CLF)
- City Affordable Housing Fund (LMI)
- City Inclusionary Housing Fund

3

AFFIRMATIVELY FURTHERING FAIR HOUSING SUMMARY

California Assembly Bill (AB) 686, which was signed into law in 2018 requires that all public agencies in the state affirmatively further fair housing (AFFH) beginning January 1, 2019. Public agencies receiving funding from the U.S. Department of Housing and Urban Development (HUD) are also required to demonstrate their commitment to AFFH. The federal obligation stems from the fair housing component of the federal Civil Rights Act mandating federal fund recipients to take "meaningful actions" to address segregation and related barriers to fair housing choice.

AB 686 requires all public agencies to "administer programs and activities relating to housing and community development in a manner that affirmatively furthers fair housing, and take no action inconsistent with this obligation".[1]

AB 686 also makes changes to Housing Element Law to incorporate requirements to AFFH as part of the housing element and general plan to include an analysis of fair housing outreach and capacity, integration and segregation, access to opportunity, disparate housing needs, and current fair housing practices.

[1] California Department of Housing and Community Development Guidance, 2021, page 9.

3.1 HISTORY OF SEGREGATION IN THE REGION

The United States' oldest cities have a history of mandating segregated living patterns—and Northern California cities are no exception. ABAG, in its recent Fair Housing Equity Assessment, attributes segregation in the Bay Area to historically discriminatory practices—highlighting redlining and discriminatory mortgage approvals—as well as structural inequities in society, and self-segregation (i.e., preferences to live near similar people).

Researcher Richard Rothstein's 2017 book *The Color of Law: A Forgotten History of How Our Government Segregated America* chronicles how the public sector contributed to the segregation that exists today. Rothstein highlights several significant developments in the Bay Area region that played a large role in where the region's non-White residents settled.

Pre-civil rights San Mateo County faced resistance to racial integration, yet it was reportedly less direct than in some Northern California communities, taking the form of "blockbusting" and "steering" or intervention by public officials. These local discriminatory practices were exacerbated by actions of the Federal Housing Administration which excluded low-income neighborhoods, where most people of color lived, from its mortgage loan program.

According to the San Mateo County Historical Association, San Mateo County's early African American residents worked in a variety of industries, from logging, to agriculture, to restaurants and entertainment. Expansion of jobs, particularly related to shipbuilding during and after World War II attracted many new residents into the Peninsula, including the first sizable migration of African Americans. Enforcement of racial covenants after the war forced African American residents into neighborhoods where they were allowed to occupy housing—housing segregated into less desirable areas, next to highways, and concentrated in public housing and urban renewal developments. As a result of these practices, the African American population today is very low in both Belmont (2.1%) and San Mateo County (2.7%).

3.2 BELMONT'S FAIR HOUSING ASSESSMENT

The Fair Housing Assessment (Appendix C) follows the April 2021 State of California State Guidance for AFFH. The study was conducted as part of the 21 Elements process, which facilitates the completion of Housing Elements for all San Mateo County jurisdictions. It includes the following sections.

PRIMARY FINDINGS

Primary findings from the Fair Housing Assessment for the City of Belmont describes fair housing enforcement and outreach capacity, integration and segregation, access to opportunity, disparate housing needs, and contributing factors and the city's fair housing action plan.

- **From 2017 to 2021, nine fair housing inquiries and two fair housing complaints were made by Belmont residents.** A complaint filed in 2017 concerned refusal to rent based on

national origin; it was settled through a conciliation agreement. A 2021 complaint based on disability for failure to make reasonable accommodations was withdrawn by the complainant.

- Fifty-four percent of Belmont's population is Non-Hispanic White, 28% is Asian, 12% is Hispanic/Latinx, and 4% is other races or mixed race. **Belmont has proportionately fewer residents of color than in the County and the Bay area overall,** although the city's Asian population is on par with the proportion in the county and Bay area.
- **Belmont has grown more racially and ethnically diverse since 2000 and 2010,** largely due to growth in Asian residents (mostly occurring between 2010 and 2020) and a slight increase in Hispanic/Latinx residents (mostly between 2000 and 2010).
- **Racial and ethnic minority populations in Belmont**—except for Asians—**are more likely to be living in poverty and be housing cost burdened compared to the non-Hispanic White population**. They are also slightly more likely to be denied a mortgage loan.
- Although **Asian residents** are less likely than other residents to experience cost burden, they **have relatively high rates of overcrowding,** suggesting that some are doubling up to afford to live in Belmont.
  - One-third of Non-Hispanic White households are cost burdened, with 15% severely cost burdened. Only 2.8% live in overcrowded conditions.
  - One-quarter of Asian households are cost burdened with only 9% severely burdened. Yet 7.8% live in overcrowded conditions.
  - Hispanic/Latinx households have much higher rates of cost burden—48% are burdened and 25% severely burdened—and one in ten lives in an overcrowded household.
- **Nearly all of Belmont's households earning 30% of AMI and less are cost burdened,** with the vast majority severely burdened. The level of burden diminishes greatly once households earn 80% of AMI and more.
- According to TCAC's educational opportunity map, **all census tracts in Belmont have schools with the most positive educational outcomes.** Belmont offers a strong educational environment citywide. Students with disabilities in the Belmont-Redwood Shores district score comparatively well compared to students with disabilities in other districts.
- **Yet educational outcomes still vary for some racial and ethnic groups,** and the school district could improve proficiency gaps and differences in suspension rates. Specifically, 82% of students in Belmont's district meet or exceed English language arts and literacy standards; 79% exceed math standards; both are higher than the county overall. These outcomes are much lower for some students of color: 44% of Black or African American students and 64% of Hispanic students meet or exceed state English language arts standards, and 37% of Black or African American students and 52% of Hispanic students meet or exceed state math standards.

- **Suspensions are disproportionately high for Hispanic students.** Hispanic students make up 34% of the high school district student body yet account for 66% of suspensions.
- **Belmont's largest challenge lies in housing affordability**. In two census tracts, between 40% and 60% of renter households face housing burden. Yet compared to surrounding cities, Belmont offers better rental affordability, according to the HCD Location Affordability Index. Just 18% of Belmont's owner-occupied units are priced below $1 million, compared to 44% for the county and 65% for the Bay area overall.
- **Belmont has not kept up with demand for new housing**. The number of homes in Belmont increased by 4% from 2010 to 2020, much improved from the prior decade where housing units increased by just 1%. Yet production still lags demand, especially for affordable housing. Between 2010 and 2020, Belmont built more single family than multi-family homes, and the city's share of housing stock comprised of single family detached homes is above that of other jurisdictions in the region.
- Nine percent of Belmont's residents have a disability, which is on par with the county and the Bay Area overall.
- **Belmont does not currently have a pattern of segregation or clustering based on race unlike nearby cities.** The Racial Dot Map (Figure 3-1) provides a visual demonstration of the spatial distribution of residents based on race in Belmont while Figure 3-2 includes the surrounding area for context.
- **Geospatially, lower-income residents are distributed throughout the city, without strong patterns of clustering.** The Income Dot Map (Figure 3-3) shows that Belmont has a distribution of all income groups with a slight concentration of above-moderate income residents in the northwest portion of the city.

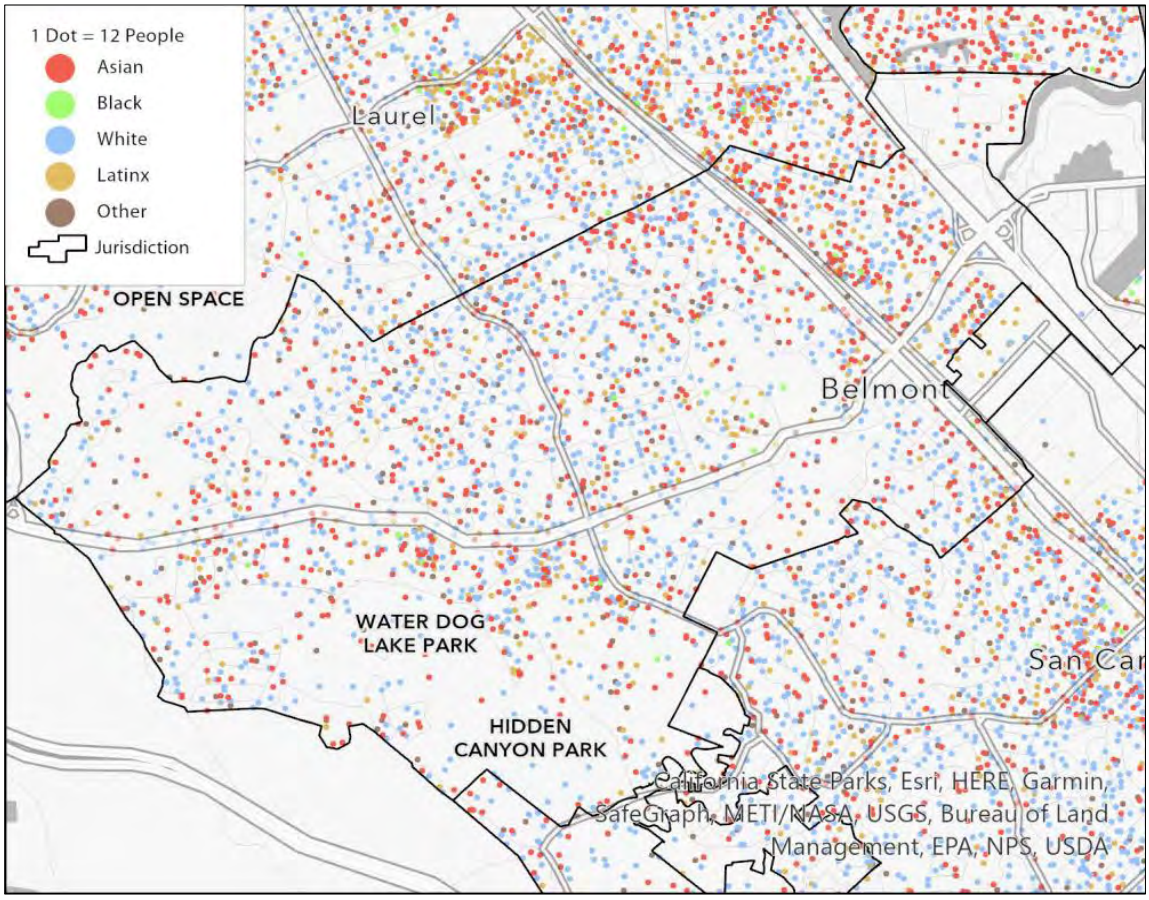
3.3 FAIR HOUSING CHALLENGES AND CONTRIBUTING FACTORS

Belmont is characterized by high-resourced neighborhoods, where residents have good access to employment opportunities and strong educational outcomes and live in environmentally healthy areas. In comparison to the Bay Area and surrounding jurisdictions, Belmont does not have a concentration of low-income household in lower resourced neighborhoods. Belmont struggles, however, to provide the housing and affordability needed by low- and moderate-income households. As such, Belmont households who cannot afford housing are significantly cost burdened and some live in overcrowded conditions.

The fair housing issues—and the factors contributing to those issues—identified by the research conducted for this AFFH include the following.

- **Few residents file fair housing complaints, indicating a potential lack of awareness about fair housing rights.** Contributing factors include lack of access to information about fair housing rights and limited knowledge of fair housing by residents.

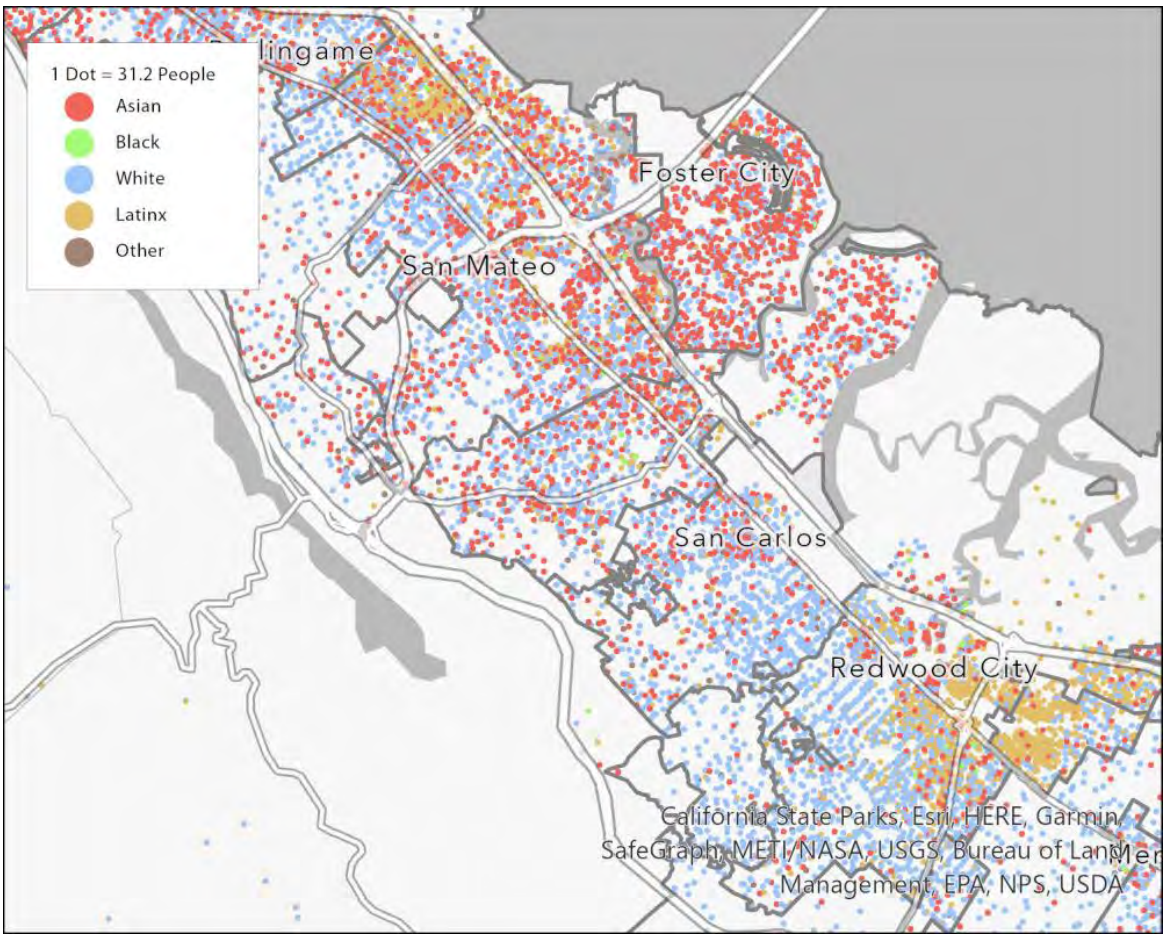
Figure 3-1: Racial Dot Map of Belmont (2020)



Universe: Population.
Note: The plot shows the racial distribution at the census block level for City of Belmont and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

- Other than Asian residents, **Belmont has proportionately fewer residents of color than in the county and the Bay area overall.** Contributing factors include lack of affordable housing and low housing production.
- Persons of color are highly cost burdened and/or live in overcrowded housing conditions. Households with incomes of less than 80% AMI face very high levels of burden, with 93% of extremely low-income households facing burden and 79% of 31-50% AMI households facing burden. Contributing factors include lack of affordable housing, lack of a range of housing types, lower incomes of persons of color, and low housing production.
- Access to quality educational institutions is strong, but students of color still face disparities in subject proficiency within schools. Overall, 82% of students in Belmont's district meet or exceed English language arts and literacy standards and 79% exceed math standards. For Black or African American students, however, 44% are English language arts and literacy proficient and 37% are math proficient. For Hispanic students, 64% are English language arts and literacy proficient and 52% are math proficient.

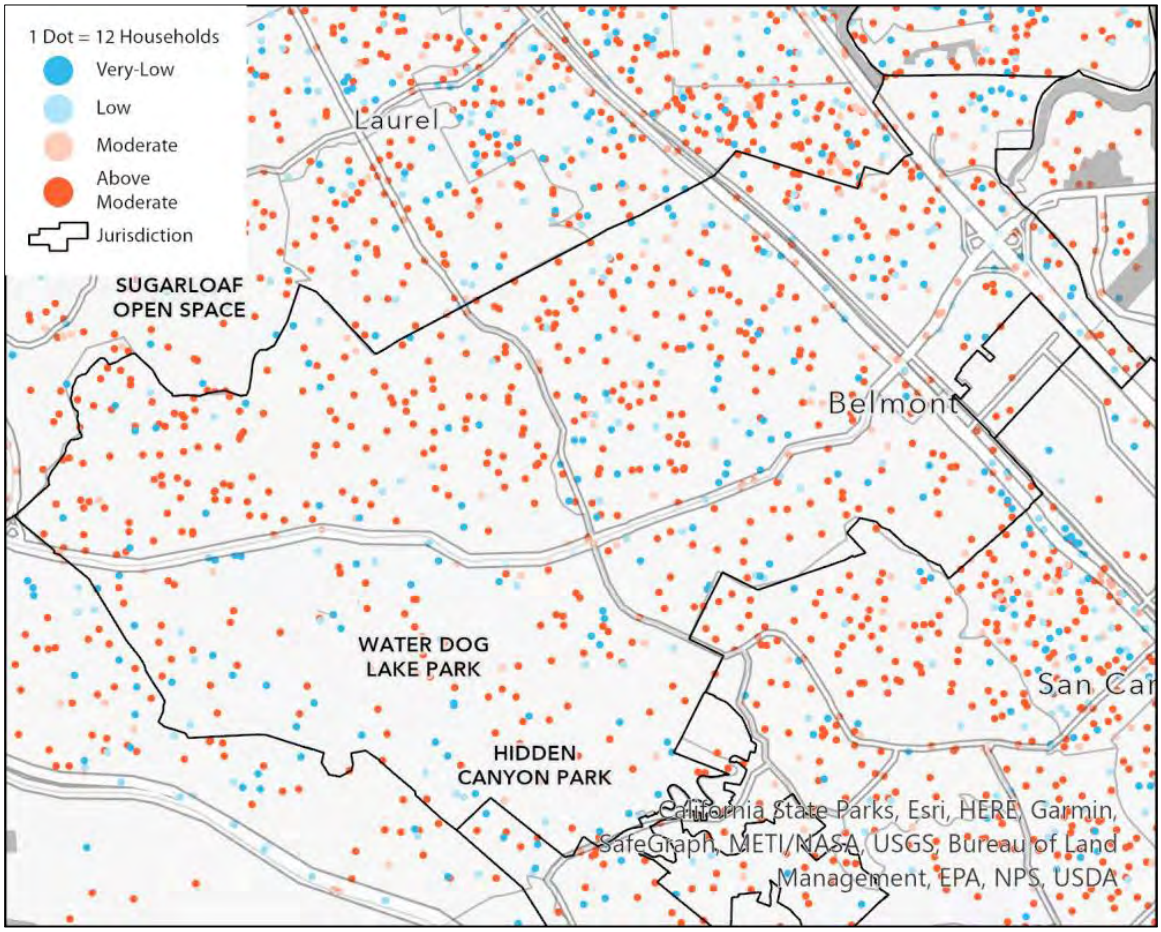
Figure 3-2: Racial Dot Map of Belmont and Surrounding Areas (2020)



Universe: Population.
Note: The plot shows the racial distribution at the census block level for City of Belmont and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

- **Hispanic students face high rates of suspension compared to their representation among student bodies.** The reason for these disparities is unclear and should be examined. The gaps suggest that Black and African American and Hispanic students need greater support to succeed, and that schools in the Belmont area need to focus more closely on efforts to close proficiency gaps and ensure equity in education.
- **Local Fair Housing Issues.** As discussed in a residents' survey, some Belmont residents do feel they were discriminated against. Actions taken after the discrimination include: doing nothing for fear of harassment or eviction (50%) or did not report the event because they were unsure what to do (38%). For Belmont, it is important to take note of the large volume of respondents who did not report the incidence due to lack of information on reporting discrimination. These results suggest that there is a lack of fair housing information being provided to city residents on housing rights and how/where to file a housing discrimination complaint.

Figure 3-3: Income Dot Map of Belmont (2015)



Universe: Population.
Note: The plot shows the income group distribution at the census block group level for City of Belmont and vicinity. Dots in each block group are randomly placed and should not be construed as actual placement of individuals.
Source: U.S. Department of Housing and Urban Development (HUD), American Community Survey 5-Year 2011-2015 Low- and Moderate- Income Summary Data.

Residents have also been denied housing while looking for rentals or homes. Overall, 62% of respondents living in Belmont had looked for housing to rent or buy in the past five years. Of those who had looked for housing to rent or buy, 52% were denied housing. The top reasons for denial are listed below distinguished by prospective renters and homebuyers.

For Belmont respondents looking for rental housing, top reasons for denial include the following:

- 33% reported that the landlord did not return their calls or emails asking about the unit;
- 27% had been told by a landlord that the unit was available but when they showed up in person the unit was no longer available; and
- 27% were denied because another renter/applicant was willing to pay more in rent.

Reasons for denial among those seeking to buy a home include the following:

- 35% responded "none of the above;"
- 21% had a real estate agent that told them they would need to show that they were prequalified with a bank; and
- 15% perceived that they were only shown homes in neighborhoods where most people were of the same race/ethnicity.

For both renters and homebuyers, denial reasons include the following:

- 38% were denied housing because their income was too low; and
- 27% reported that they haven't established credit history or have no credit history.

An additional fair housing obstacle for Belmont is local opposition to the City's plan to create more housing. This is a fair housing issue as opposition can hinder Belmont's ability to provide equal opportunity to access housing among protected classes. During the community outreach process for the Housing Element, residents in the Sterling Downs, Homeview, and El Camino neighborhoods expressed concern about the concentration of the housing development opportunity sites in their neighborhoods due to its potential impact on neighborhood character and traffic congestion. The city is zoned for higher-density multi-family housing projects in this area because of its proximity to public transit and commercial retail services. In response to these concerns, staff worked with the residents of the community on revisions to the housing development opportunity sites and ultimately received their support for the adopted January 2023 Housing Element.

3.4 FAIR HOUSING ACTION PLAN

The Fair Housing Action Plan was developed in response to the letter and spirit of the law, this analysis, and community input. Geospatially, Belmont residents are relatively well distributed throughout the community based on race and income as demonstrated in Figures 3-1 and 3-3.

The housing mobility programs (referenced in Table 3-1 below) build on that pattern of distribution and enhance it through intentional programs to increase the variety of housing types throughout the city and address identified fair housing issues. These approaches will affirmatively further fair housing and foster an inclusive community by: 1) Encouraging additional units spread throughout existing single-family neighborhoods; 2) Creating more small units to provide options to highly cost burdened people of color; and 3) Allowing larger ADUs and SB9 units on lots 10,000 square feet or larger to better accommodate households living in overcrowded conditions.

Another housing mobility opportunity lies in religious institutions and private schools that are well distributed throughout the city. These land uses often have underutilized areas of their properties where additional units may be possible. One of the local churches has been in touch with staff to inquire about potential development. The City will conduct direct outreach to

these institutions and provide technical assistance through *Program H5.8* (See *Chapter 7 Housing Goals, Policies, and Programs*).

Taken together, these policies will create new housing opportunities throughout the community. Figure 3-4 shows the distribution of lots 10,000 square feet or greater, where larger ADUs and SB9 units will be located; religious institutions and schools; existing multi-family housing sites; and Housing Inventory Sites in this Housing Element.

Table 3-1 below summarizes the fair housing issues, contributing factors, and implementation programs to affirmatively further fair housing in Belmont. Contributing factors are prioritized on whether they most limit or deny fair housing choice or access to opportunity or negatively impact fair housing or civil rights compliance.

Figure 3-4: Visualization of Housing Mobility Programs and Existing Multi-Family

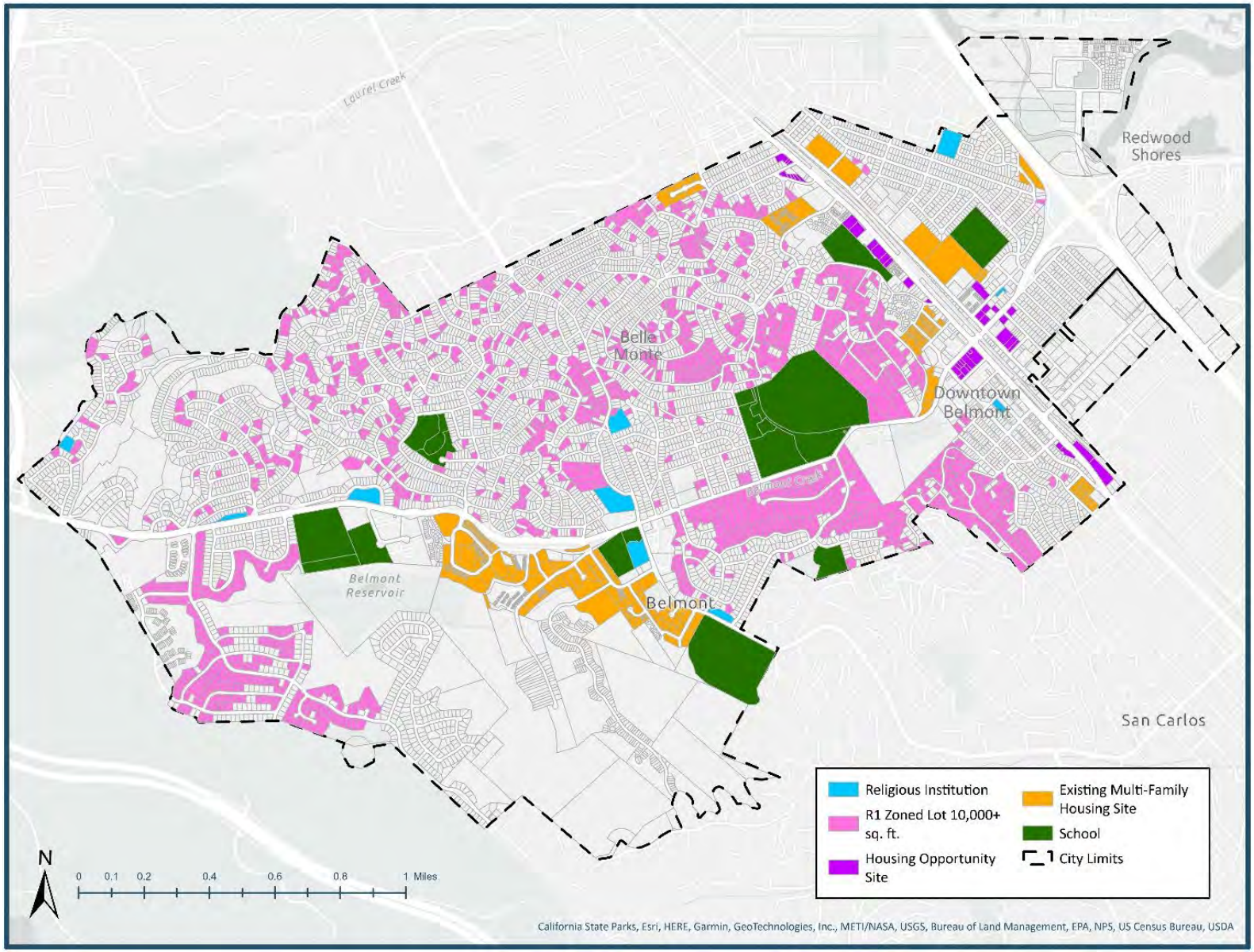


TABLE 3-1: FAIR HOUSING ACTION PLAN

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
Lack of fair housing complaints filed.	Lack of access to information about fair housing rights. Limited knowledge of fair housing by residents.	High	▪ H5.1: Update Website to Improve Access to Fair Housing Information and Housing Services.	▪ Complete best practices review by Q1 2025. ▪ Complete website update by Q2 2025, update quarterly thereafter.
Very high rates of cost burden for <50% AMI households and Black and Hispanic households; high rates of overcrowding among Asian households.	Lack of affordable housing citywide; low housing production.	High	▪ H5.2: Coordinate with other jurisdictions and agencies in the County to advance AFFH goals	▪ Attend regular meetings with 21 Elements, 21 Directors and Housing Managers group. Collaborate with peer jurisdictions to implement Housing Element Programs that would benefit from efficiencies of scale.
			▪ H5.3: Modify the Inclusionary Housing Program.	▪ Complete feasibility analysis by Q4 2025; Implement redesigned program by Q1 2026.
			▪ H5.4: Work with Housing Developers to Affirmatively Market Housing to Households with Disproportionate Housing Needs.	▪ Establish list of service providers by Q4 2024 and update annually thereafter. ▪ Ongoing as projects are processed, review developer marketing plans to ensure affirmative marketing is included.
			▪ H5.6: Expand Tenant Protections	▪ In Q4 2025, draft extended tenant protections provisions and research policy provisions for substantial remodel exemptions and right of return policies. ▪ Bring recommended language to City Council in Q1 2026. Conduct proactive outreach to tenants and tenant groups bi-annually.
			▪ H5.7: Continue Financial Support of Existing Home Sharing Program.	▪ City will grant funding as part of annual budget process. ▪ Meet with HIP Housing within one year of Housing Element Certification and annually thereafter.

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
			▪ H5.8: Facilitate Development of Housing on Institutional Properties.	▪ Reach out to each religious institution site owner or operator within one year following Housing Element certification and annually thereafter. ▪ Provide mailed notifications to religious institutions within six months of the adoption of any new State legislation that reduces barriers to development of religious institution sites. ▪ Reach out to each private school site owner or operator within one year following Housing Element certification and annually thereafter.
			▪ H5.9: Amend Zoning Code to Facilitate Production of ADUs and SB9 units.	▪ Complete zoning ordinance amendments and establish policies and procedures to facilitate these types of projects within one year following Housing Element Certification.
			▪ H5.10: Provide Financial Support for ADUs that Serve Lower-Income Households.	▪ Participate in Countywide process in 2024. ▪ Establish a grant or loan program by Q4 2025.
			▪ H5.11: Conduct Outreach to Encourage ADU and SB9 Unit Production.	▪ Conduct analysis and outreach related to units on sloped sites in Q2 2025. ▪ Join ADU Resource Center and launch online plans gallery in Q3 2024. ▪ Create new outreach materials in Q1 2025. ▪ Conduct outreach to all ADU/JADU/SB9 owners within 9 months of Housing Element Certification and annually thereafter.
			▪ H5.12: Create an AFFH Monitoring Program.	▪ Create a list and map of existing ADUs, JADUs and SB9 units within six months of Housing Element adoption. ▪ Participate in regional process to establish an ADU monitoring program on timing they set forward. ▪ If ADU production does not meet target, consider additional efforts such as reducing process and permitting fees to incentivize production in 2027.

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
Persons with disabilities and persons of color are most likely to file fair housing complaints with HUD.	Lack of accessible affordable units; housing discrimination.	Medium	▪ H5.5: Provide Fair Housing Training for Landlords and Tenants.	▪ Ongoing annual check in with Project Sentinel. ▪ Provide training in 2025 and every two years thereafter.

Source: City of Belmont, 2024.

4

CONSTRAINTS

Many factors can encourage or constrain the development, maintenance, and improvement of the housing stock, including economic forces in the private market as well as regulations and policies imposed by public agencies. Constraints including physical constraints, land availability, the economics of development, and governmental regulations each have an impact on the cost and amount of housing produced.

State law, specifically Government Code Section 65583(a)(5-6), requires that housing elements analyze potential and actual governmental and nongovernmental constraints to the production, maintenance, and improvement of housing for persons of all income levels and disabilities. The constraints analysis must also demonstrate local efforts to remove or mitigate barriers to housing production and housing for persons with disabilities. The identification and analysis of these constraints have informed the City of Belmont's development of appropriate programs that mitigate these constraints, as provided in *Chapter 7, Housing Goals, Policies, and Programs*.

4.1 Non-Governmental Constraints

Non-governmental constraints are those that are generated by the economic and social environment which are beyond the control of local governments. Some of the impacts of non-governmental constraints can be offset to a minimal extent by local governmental actions, but usually the effects are localized and have little influence on the housing need in the jurisdiction or market area.

DEVELOPMENT COSTS

CONSTRUCTION AND LABOR COSTS

Construction costs, which can comprise a significant portion of the sales price of a housing unit, are one of the major cost factors with residential development. According to a report released in March 2020 on multi-family construction costs in California from the Terner Center, many different factors layer together to affect the bottom-line costs of building new housing and whether or not a project will ultimately "pencil": the costs of acquisition (e.g., land and closing costs), hard construction costs (e.g., materials and labor), soft costs (e.g., legal and professional fees, insurance, and development fees), and the costs of conversion once a project is completed (e.g., title fees and the operating deficit reserve).[1] According to its research, the largest share of a project's total cost comes from materials and labor, or hard costs.

Hard construction costs make up more than 60% of total development costs. The Terner Center study found that on average, construction costs were about $222 per square foot in 2018 compared to $177 in 2008 to2009, representing a 25% increase. While these increases have been felt across the State, costs are highest in the Bay Area, which saw costs rise by 119% during the same period, to over $380 per square foot. The reasons for this are complex, but the Terner Center suggests this is in part because of higher labor costs to attract workers since the cost of living is so high here; local regulations that require certain materials or building components to be used; lengthy review processes; and other local constraints.[2]

Statewide labor costs have also increased in recent years as the labor pool has not kept pace with the increase in demand. Since the recession, California has seen a severe tightening in the construction labor market, especially for workers trained in specific construction trades. The lack of an available labor force drives up the cost of labor and leads to project delays as workers are either unavailable or lost to more profitable projects.

Several additional factors have caused the increased cost of materials, including global trade patterns and federal policy decisions such as tariffs, as well as state and local regulations such as building codes. The COVID-19 pandemic has also influenced the cost and availability of construction materials. Supply chain disruptions have resulted in project delays and increased costs due to a shortage of construction materials and equipment.

PRICE OF LAND

The cost of land has also increased substantially over the past decade. Many jurisdictions are now essentially built out, with no available vacant land for development. Many locations in the

[1] See the Terner Center's series on housing costs at https://ternercenter.berkeley.edu/research-and-policy/the-cost-of-building-housing-series/.

[2] Terner Center, 2020. "The Hard Costs of Construction: Recent Trends in Labor and Materials Costs for Apartment Buildings in California," p. 15, March.

Bay Area experience substantially higher land values than in other areas in the State because of the attractiveness of living along the coast with its mild climate, access to high-tech jobs, and plentiful amenities. A study by Economic & Planning Systems (EPS) in April 2020 analyzed per-acreage prices for vacant land in Belmont required by the Quimby Act to update the Parkland Dedication in-lieu fee calculations; the evaluation found that over a roughly two-year period (2018 to 2019), the average price per acre for residential land sales was approximately $3.5 million as shown in Table 4-1.

TABLE 4-1: VACANT LAND COSTS PER ACRE (2020)

Address	Date Sold	Price	Acreage	Price Per Acre
816 Covington	8/27/2019	$2,000,000	0.72	$2,777,778
2244 Semeria	4/26/2019	$580,000	0.13	$4,461,538
2121 Arthur	3/15/2019	$775,000	0.14	$5,535,714
1822 Hillman	3/14/2019	$775,000	0.14	$5,5335,714
Lots 1 & 3 Upper Lock	1/30/2019	$173,000	0.65	$266,154
Alhambra	9/26/2018	$43,800	0.40	$109,500
0 Arthur	9/19/2018	$545,000	0.19	$2,868,421
0 San Ardo	7/30/2018	$125,000	0.33	$378,788
3147 Marburger	5/18/2018	$1,650,000	0.12	$13,750,000
2902 San Juan	5/18/2018	$2,400,000	0.14	$17,142,857
Undisclosed	4/24/2018	$2,000,000	0.15	$13,333,333
2 Monte Cresta	3/25/2018	$130,000	0.10	$1,300,000
Weighted Average, Rounded[a]				**$3,500,000**

[a] Rounded to nearest $1,000,000.
Sources: Zillow; Economic & Planning Systems, Inc.

By contrast, during the last Housing Element a similar analysis found that average per-acre prices were approximately $820,000. This means that since the last Housing Element, land prices have increased more than 325%.

All these factors work together to make it so developers must charge substantial rents and sales prices to cover these costs. The Terner report notes that, for example, a multi-family unit that costs $800,000 to build will need to charge approximately $4,000 in monthly rent—a price well over the typical monthly earnings in the state—to cover those costs and meet return on investment requirements for investors.

The impact of high construction and land costs on affordable housing cannot be understated. According to a study by the Bay Area Council, in 2019 there were 23 new construction projects of below market-rate housing financed through the California Tax Credit Allocation Committee (TCAC), with a total of 1,912 units across six counties of the nine-county Bay Area. Each project in California requested federal and/or state tax credits to finance the new construction of housing units with rents affordable to households earning 30-60% of area median income (AMI; this translates to very low-income households). The project costs consisted of land and

acquisition, construction costs, construction contingency, architectural/engineering, construction interest, permanent financing, legal fees, reserves, other costs, developer fees, and commercial costs. Project costs were analyzed to determine the reasonableness of all fees within TCAC's underwriting guidelines and TCAC limitations.

The report found that the average construction cost of new below market rate housing in the Bay Area was $664,455 per unit—far more than lower-income households can afford without subsidies (see Figure 4-1). By comparison, other projects across California (excluding the Bay Area), on average cost $385,185 per unit of below market rate housing.[3]

Figure 4-1: Average Per Unit Cost Construction of New Below Market Rate Housing (2019 Data by County)



AVAILABILITY OF FINANCING

The availability of capital to finance new residential development is a significant factor that can impact both the cost and supply of housing. Two types of capital are involved in the housing market: 1) capital used by developers for initial site preparation and construction, and 2) capital for financing the purchase of units by homeowners and investors. Interest rates substantially impact home construction, purchase, and improvement costs. Fluctuation in interest rates can have a significant impact on costs for construction or purchase, as well as impact whether a potential buyer can qualify for a loan. Since mid-2022, interest rates have soared after several years of historical lows, and a strong consumer price index report in March 2024 means they are

[3] http://www.bayareaeconomy.org/how-much-does-it-cost-to-produce-one-unit-of-below-market-housing-in-the-bay-area/.

expected to remain steady through mid-2024.[4] Competition for affordable housing funding also affects overall housing production. Low Income Housing Tax Credits (LIHTC) represent the primary funding source for new affordable housing. Historically the 9% tax credit (which is designed to subsidize 70 percent of the project cost) has been extremely competitive. Affordable housing developers are indicating that 4% tax credits (designed to subsidize 30 percent of the project) are becoming increasingly competitive, resulting in a longer project timeline and delayed start of construction (up to two additional years, as they must apply multiple times before they are able to secure tax credits).

COMMUNITY OPPOSITION

As development activities increase, many communities are met with opposition to new housing developments that are perceived to threaten existing community character, increase neighborhood traffic, or limit land available for commercial development activity. The projects that most often draw opposition are high-density multi-family developments, transitional or supportive housing, and housing affordable to lower-income households. Belmont City officials, staff, and developers can work to assuage these concerns by relying on the adopted objective design standards for multi-family development during the design review process, emphasizing quality management of new developments, and engaging in public education to address myths about high-density/affordable/supportive housing.

LOT SIZE CONSTRAINTS

The City of Belmont recognizes the challenges associated with building housing, especially that which is affordable, on infill sites. Many parcels in the Belmont Village area and along El Camino Real are considered small. For example, the average size of a parcel zoned Corridor Mixed Use (CMU) on El Camino Real is 0.3 acres. The City acknowledges that parcels may need to be consolidated under one owner to facilitate mixed use and affordable housing development.

A review of pending and pipeline projects in Belmont indicates that housing developers have been successful in consolidating parcels to create larger project development sites and also have managed to design projects that work on smaller sites that are less than half an acre. Certain incentives, such as State Density Bonus, enable housing developers to achieve the densities required to support the financial impacts of lot consolidation and/or development of constrained sites. More information on lot consolidations and small lot developments in existing pipeline and pending projects in Belmont that are either under construction or in development review are described in *Chapter 6, Adequate Sites* (see Table 6-4 and 6-5).

Unlike many other Peninsula communities, Belmont does not have a historic "main street" or a cohesive downtown residential district. The Belmont Village Specific Plan (BVSP) area consists primarily of small shopping centers, with stores facing onto large surface parking lots rather than sidewalks. This auto-oriented format contributes to a scattered pattern of development

[4] Kiplinger Interest Rates Outlook: Still-Strong Inflation Will Delay Fed Rate Cuts, April 11, 2024, https://www.kiplinger.com/economic-forecasts/interest-rates.

activity, with no clear focal point to attract people and create a sense of destination. Additionally, heavy, fast-moving traffic on Ralston Avenue and El Camino Real creates a barrier that divides the downtown area. The BVSP includes policies to encourage more intense, compact development and active ground floor uses to address these conditions.

ENVIRONMENTAL CONSTRAINTS

The environmental setting affects the feasibility and cost of residential development. Environmental issues range from the suitability of land for development, the provision of adequate infrastructure and services, as well as the cost of energy. Belmont currently encompasses about 2,955 acres, and most of the parcels in the city's boundary are developed. Most of the undeveloped parcels are in the Western Hills area, with smaller amounts in the San Juan area and east of U.S. 101 freeway. These areas contain environmental constraints on development, such as steep slopes, landslide hazards, and fire or flood hazards; therefore, much of the undeveloped land has been set aside as open space. The following are environmental constraints and hazards that affect, in varying degrees, existing and future residential developments.

SEISMIC HAZARDS

The San Andreas Fault Zone is located one mile from Belmont's western boundary; however, there are no known active faults within the city. Major problems could result from ground shaking, which is likely to be amplified in the areas underlain by relatively unconsolidated deposits, especially in the eastern part of the city. Liquefaction is also a possibility in these areas. There is potential for landslides on all slopes; only site-specific investigations can differentiate the degree of risk.

TOPOGRAPHY/SLOPE

The western portion of Belmont is defined by the San Juan Hills, a section of the Santa Cruz Mountains, while the eastern portion of the city is relatively flat extending toward the San Francisco Bay. Elevations range from 0 to 838 feet above sea level. Portions of the city are steep and susceptible to landslides, slippage, erosion, and other topographic hazards. The City adopted the San Juan Hills Area Plan in 1988. The Plan found that two-thirds of the lots in the Study Area exceeded 30% slope and 90% were geologically unstable with high landslide probability. The Plan encouraged landowners to work with the City using transfer of development rights to create safer, compact, and environmentally sensitive development.

FLOOD HAZARDS AND SEA LEVEL RISE

Historical records show that sea level in San Francisco Bay has risen about 7 inches (18 cm) over the past 100 years (as of 2017). Scientists agree that the rate of sea level rise is accelerating, but projections of future sea levels vary considerably. Present projections used by the State of California are for 14 inches of sea level rise by 2050 (using 2000 as the baseline) and for between 40 and 55 inches by 2100, depending upon the emission scenario used. In 2009, the Bay

Conservation and Development Commission (BCDC) released Living with a Rising Bay, an assessment that included the following.

- Increased flooding risk for 270,000 Bay Area residents with a 55-inch rise.
- Estimated $36 billion in at-risk property by 2050, and $62 billion by 2100.
- Estimated 95% of tidal wetlands vulnerable to sea level rise, which may increase flooding and erosion.

The City's flood plain management ordinance requires flood proofing or elevation of structures above flood heights along portions of Belmont Creek and east of Bayshore. The City will continue to regulate development in the designated flood hazard areas in accordance with the ordinance. Belmont has a history of localized flooding caused by inadequate storm drainage and has taken actions to address flooding problems, including upgrading and regular maintenance of the storm drain system (see Figure 4-2 below).

Fire Hazards

Fire hazards in Belmont include both urban and wildland fires. Urban fires involve the uncontrolled burning of built structures due to human-made causes; wildland fires affect grassland, forest, and brush (and the structures on them), and can result from either human or natural causes. Belmont has a substantial risk of wildland fires, with many areas of high and very high threat, particularly in the western areas of the city.

The canyons of the Western Hills have been designated as a Very High Fire Hazard Severity Zone (VHFHSZ) by the California Department of Forestry and Fire Protection (Cal Fire), while the San Juan Canyon has been designated as a High Fire Hazard Severity Zone. Figure 4-3 shows fire hazards severity areas including the existing VHFHSZ within the city boundary.

The housing opportunity sites are located primarily within the Belmont Village Specific Plan Area, along El Camino Real, or in the area between El Camino Real and the Highway 101 freeway. These opportunity sites are on flat, mostly developed terrain surrounded by freeways and major urban roads and not conducive to the spread of wildfire and are not designated as Fire Hazard Severity Zones.

Requests for Housing Developments at Reduced Densities

State law requires the Housing Element to include an analysis of requests to develop housing at densities below those anticipated in the Sites Inventory. In Belmont, housing projects are frequently proposed at or above previously zoned density, in part because of the use of density bonuses. Belmont is moving away from applying a density metric in areas that allow multi-family residential development and instead focusing on floor area ratio as the appropriate zoning metric which enables residential development projects to achieve substantially higher densities than were previous permitted. More discussion of this is found in *Chapter 6, Adequate Sites* under the Sites Inventory Methodology section pertaining to the inventory of sites to meet the City's Regional Housing Needs Allocation (RHNA).

Figure 4-2: Flooding and Fire Hazards

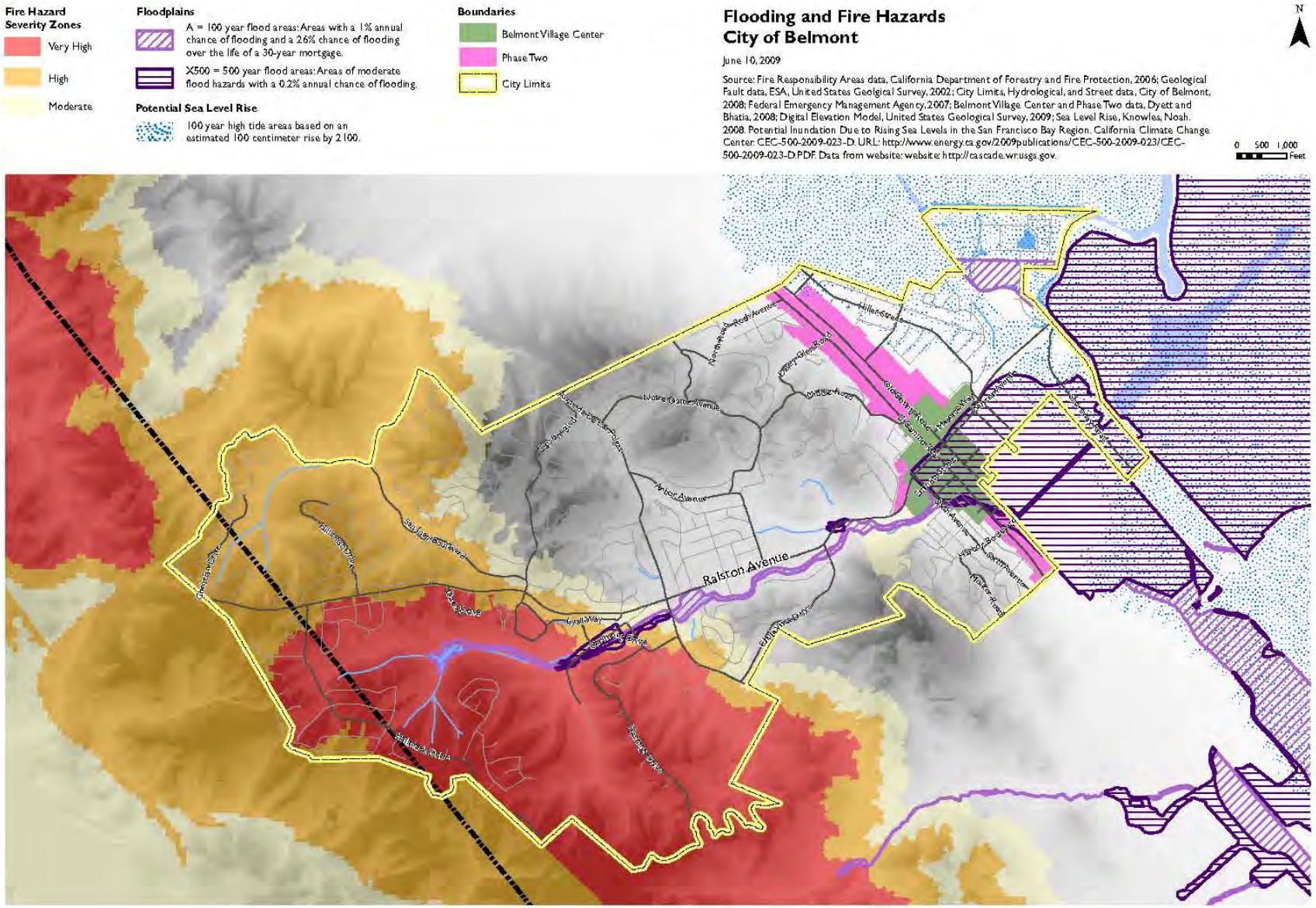
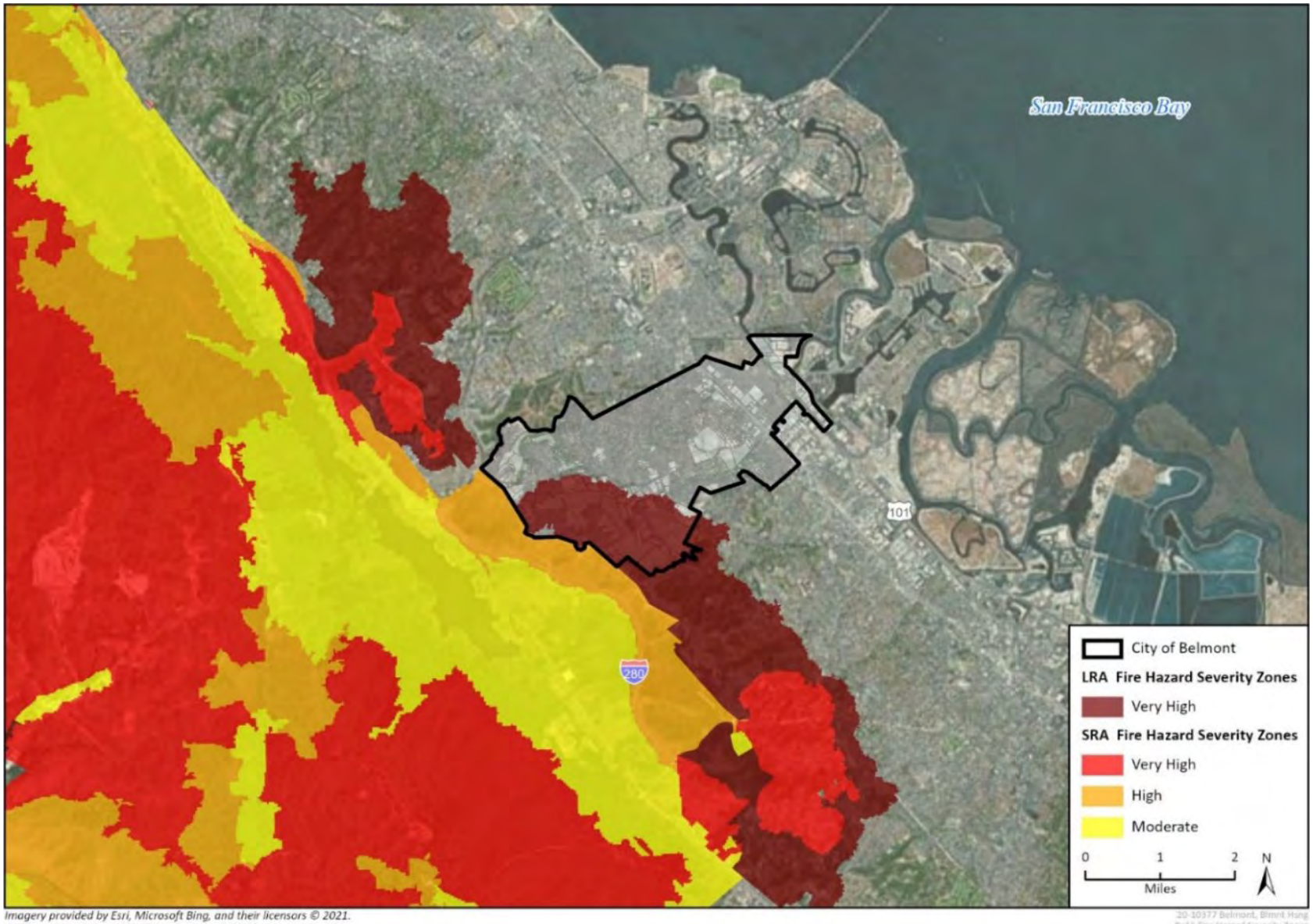


Figure 4-3: Fire Hazard Severity Zones Near Belmont



Imagery provided by Esri, Microsoft Bing, and their licensors © 2021.
Additional data provided by City of Belmont, 2014 and CalFire, 2021.

BUILDING PERMIT TIMEFRAME

After a planning entitlement for a housing development project has been approved by the Zoning Administrator, Planning Commission, or City Council; it becomes the applicant's responsibility to initiate the steps to secure building permit approvals and begin construction in accordance with the approved plans. The length of time between a project's planning entitlement approval and building permit application is determined by the applicant.

Intervening steps include obtaining additional City clearances and paying fees as outlined in a project's conditions of approval. Other necessary actions for the applicant include the following.

- Completing civil engineering and construction drawings after project entitlement approval (City does not control this timeline);
- Recording lot consolidation or parcel/final map with the County Clerk/Recorder;
- Retaining contractors to construct the project;
- Obtaining utility agency or other environmental regulatory agency approvals (not owned by the City), establishing required easements, and rights of entry; and
- Providing tenant relocation assistance, when applicable.

Belmont has taken several steps to establish a clear and timely permit review process, including offering many payment and plan submittal options both online and in-person. Once a project begins the building permit application review process, the applicant also has a shared responsibility in resubmitting materials and addressing comments in a timely manner. With responsive applicants, the following general timelines can be achieved during the building permit stage.

- Single-family projects generally take 1-3 months to receive a building permit.
- Multi-family and mixed-use projects generally take 8-10 months.
- If the project includes a Final or Parcel Map, an additional 3-4 months is usually required prior to building permit issuance. Final Map review can be completed concurrently with building permit review.

Note: Actual timeline depends on how quickly an applicant can resubmit plans with corrections, the complexity of the project, etc.

Table 4-2 presents a summary of four recently permitted housing projects in Belmont and the time between entitlement approval, building permit application, and building permit issuance.

TABLE 4-2: PREVIOUS DEVELOPMENT TIMELINES

Project	Number of Units	Entitlements Approved	Building Permit Application	Final Map Recorded	Building Permit Issued
Firehouse Square	66 affordable rental units	October 2019	December 2019	June 2020	August 2020
Artisan Crossings, 1325 Old County Rd[a]	250 units; 212 market rate, 38 affordable	May 2019	August 2019	May 2021	May 2021
815 Old County Rd	177 units; 150 market rate, 27 affordable	June 2021	June 2021	N/A	April 2022
803 Belmont Ave[b]	125 affordable rental units	May 2022	September 2023	April 2024	May 2024

[a] This project timeline was longer than typical since several parcels needed to be annexed from the County in the City of Belmont through LAFCO.

[b] This project timeline was longer than typical since the project applicant needed to apply for and be awarded tax credit financing in order to proceed with construction.

Source: City of Belmont, 2024.

LOCAL EFFORTS TO REMOVE NONGOVERNMENTAL CONSTRAINTS

The Housing Element 2023-2031 Sites Inventory relies heavily on non-vacant sites to accommodate the regional housing need for lower-income households. The City has identified the following incentives and concessions to mitigate non-governmental constraints and to promote residential development on non-vacant sites at all affordability levels.

- **State Density Bonus.** Belmont Zoning Ordinance Section 26, Density Bonus, originally adopted in 2014, specifies how local compliance with State Density Bonus Law (Government Code Section 65915) will be implemented to encourage production of lower-income housing units in Belmont. The Density Bonus program allows housing developers to request zoning incentives and waivers, such as a reduction in site development standards or modification of a zoning code requirement, that enable a project to achieve a higher project density and provide additional affordable housing units. The City's Inclusionary Ordinance requires housing developments to provide 15% of their units as affordable if they are 25 units or above, resulting in these projects automatically qualifying for State Density Bonus. As a result, this program has been used by nearly every recently built project in Belmont, and the City expects this will continue to incentivize increased housing production during the next planning period. Although the Belmont Zoning Ordinance was adopted in 2014, the City continues to update its processes and procedures to comply with current law. Program H4.2, Zoning Code Amendments to Remove Constraints, includes updating the Ordinance in 2024 and regularly thereafter.
- **Zoning Modifications to Increase Density.** The Housing Element includes Program H4.1, Update Zoning Code to Increase Floor Area Ratios and Density, to modify the Zoning Ordinance to incentivize increased housing unit production (completed in January 2024). The CMU zoning district, which includes most of the property along the entire El Camino Real frontage, was amended to increase the maximum floor area ration (FAR) from 1.75 to 2.0 (up to 2.5 with provision of community benefits), and to eliminate the maximum residential density. Similarly, the Village Station Core (VSC) zoning district was modified to increase the maximum floor area ration from 1.5 to 2.0 (up to 2.5 with provision of

community benefits); the VSC zoning district already has no maximum residential density metric. Both amendments are anticipated to provide a significant financial incentive to housing developers and to encourage provision of affordable housing units. The Inclusionary Housing Requirement will be amended (Program H5.3, Modify the Inclusionary Housing Program) to further incentivize provision of lower-income housing units.

- **Affordable Housing Mitigation Fees.** The City collects inclusionary housing in-lieu fees (for projects under 25 units) along with housing commercial linkage fees (collectively referred to as housing mitigation fees) to be used for housing production and preservation. Program H1.2, Use Public Funding for Low/Moderate Income Housing, directs the City to use these fees to fund affordable housing development, with a priority on lower income levels. City financial contributions have been crucial in supporting current 100% affordable housing projects in Belmont, including Firehouse Square (66 affordable apartments), ROEM Housing Corporations project at 803 Belmont Avenue (125 affordable units), and the Linc Housing project at Hill Street and El Camino Real (37 affordable units).

4.2 GOVERNMENTAL REGULATIONS AND CONSTRAINTS

This section describes City policies and regulations that could potentially constrain the City's ability to achieve its housing goals. Potential constraints to housing development include land use controls (through General Plan policies and zoning regulations), development standards, infrastructure requirements, development impact fees, and development approval processes. While government policies and regulations are intended to serve public objectives and further the public good, the City recognizes that its actions can potentially constrain the availability and affordability of housing to meet the community's future needs.

LAND USE CONTROLS

The Land Use Element of the Belmont General Plan sets forth the City's policies for guiding local development. These policies, together with existing zoning regulations, establish the amount and distribution of land allocated for different uses within the city. Table 4-3 describes General Land Use designations that allow residential uses. The low-, medium-, and high-density districts, and the Hillside Residential Open Space district, differ in allowable density and development standards. In addition, the General Plan permits multi-family residential uses in the Belmont Village Specific Plan (BVSP) Area and in the Corridor Mixed Use (CMU) zone along the El Camino Real corridor.

In 2017, the City completed a comprehensive update of the Belmont 2035 General Plan and adopted the BVSP which established new Village zoning districts in the BVSP area and created a new CMU zoning district along the El Camino Real corridor. These regulatory updates were designed to modernize and simplify zoning standards, and to accommodate higher-density and mixed-use housing near transit.

TABLE 4-3: LAND USE CATEGORIES ALLOWING RESIDENTIAL USES

General Plan Land Use	Zoning District(s)	Density (Units per Acre)	Residential Type(s)
Low-Density Residential	R-1	1-7	The Low-density Residential land use designation applies to the use of land primarily for single-family detached residences but can also include townhouse developments that are clustered to provide open space.
Medium-Density Residential	R-2, R-3	8-20	The Medium-density Residential land use designation applies to the use of land for duplexes, townhomes, low-rise apartment buildings, and other less intense multi-family residential development types.
High-Density Residential	R-4	21-30	The High-density Residential land use designation applies to multi-family apartment buildings.
Hillside Residential Open Space	HRO	Density determined by slope	The Hillside Residential and Open Space land use designation applies to land in the San Juan and Western Hills Plan areas that contain steep slopes, species habitat, and environmental resources.
Belmont Village Mixed-Use	VCMU VHDR VC VSC	No density limit	The Belmont Village Mixed Use and Belmont Village High-density Residential land use designations applies to parcels in the Belmont Village Priority Development Area (PDA) and is intended to promote a pedestrian-oriented, mixed-use core in Downtown Belmont.
Corridor Mixed-Use	CMU	No density limit	The Corridor Mixed Use land use designation applies to parcels along El Camino Real outside of the Belmont Village PDA and is intended to provide community and visitor-serving retail and services, high-density residential, lodging, and office.

Source: Land Use Element, Belmont General Plan; Belmont Zoning Ordinance; Belmont Village Specific Plan.

ZONING ORDINANCE

The City regulates the type, location, density, and scale of residential development through the Zoning Ordinance. Zoning regulations are designed to protect and promote the health, safety, and welfare of local residents, as well as implement the policies of the General Plan. The Ordinance sets forth the City's residential development standards, including density, height, lot coverage, and parking.

ALLOWED RESIDENTIAL USES

Table 4-4 summarizes the various housing types currently permitted within Belmont's residential and corridor mixed use zones. Each use is designated by a letter denoting whether the use is allowed (P) or conditionally permitted (C). As indicated, multi-family dwellings are permitted in residential zones (R-3 and R-4) and the CMU district when located above the ground floor. Table 4-5 summarizes residential use regulations in the Village zoning districts. Related to residential uses on ground floors, please see detailed discussion below in the Zoning for a Variety of Housing Types – Mixed-Use Zones subheading.

TABLE 4-4: HOUSING TYPES PERMITTED IN RESIDENTIAL AND CORRIDOR MIXED-USE DISTRICTS

Type	HRO	R-1	R-2	R-3	R-4	CMU
Single-Family[a]	P	P	P	P	P	
Duplex (2 units)			P	P	P	
Single-Family Row House/Townhouse	C[b]			P	P	
Multi-Family[c]				P	P	P/C
Accessory Dwelling Units (ADUs)	P	P	P	P	P	P
Nursing / Convalescent Homes[e]						
Six or Fewer Residents	C	P	P	P	P	C
Seven or More Residents		C	C	C	C	C
Homes for the Ambulatory Aged and Retirement Homes				C	C	C
Lodging /Boarding / Rooming Houses					C	C
Transitional Housing[f]		ns	ns	ns	ns	ns
Emergency Shelters		ns	ns	ns	ns	P[g]
Fraternity & Sorority Houses					C	C
Apartment Hotel						ns

Key: P = Permitted C = Conditionally Permitted ns = Not Specified

[a] There are three HRO districts. Single-family residences are not permitted in HRO-3 zones west of Hastings Drive and accessed by Carlmont Drive.

[b] Townhouses are permitted with a CUP in the HRO-3 zone only.

[c] In the Corridor Mixed Use district multi-family housing is a permitted land use when located above the ground floor; multi-family residential uses are conditionally permitted on the ground floor. See discussion below.

[d] Mobile home parks currently only allowed in M-1 zones; subject to rezone per Program H4.2.

[e] The City's current Zoning Ordinance includes a definition for Nursing/Convalescent homes that covers licensed care facilities and other group care facilities such as hospices. Updates will be done per Program H4.2.

[f] Transitional and Supportive Housing, as well as Emergency Shelters, will be permitted in all Multi-Family Residential zoning districts per Program H4.2.

[g] Emergency Shelters permitted by right on CMU zoned parcels in the S-2 Emergency Shelter Combining District.

Source: Zoning Ordinance; City of Belmont Planning Department.

PLANNED DEVELOPMENT DISTRICT

The Planned Development (PD) district accommodates various types of uses, such as single-family and multi-family residential developments, neighborhood and community shopping centers, professional and administrative areas, and other uses or a combination of uses that can be made appropriately as part of a Planned Unit Development (PUD). The PD district is established to allow flexibility of design that is in accordance with the objectives and spirit of the General Plan.

The PD zone is intended to enable the City to modify site development standards to facilitate development projects. In addition, the project can be presented as a complete package and potentially avoid the additional time and costs associated with multiple variances. However, because a zoning change requires multiple hearings and a legislative action, the PD process may extend the total development review time. PD zoning is another, optional tool for applicants to pursue projects beyond the zones that permit residential development with unlimited density.

TABLE 4-5: HOUSING TYPES PERMITTED IN VILLAGE ZONING DISTRICTS

	Village Core (VC)	Village Station Core (VSC)	Village Corridor Mixed-Use (VCMU)	Village High-Density Residential (VHDR)
Family Day Care Home				
Small Family	X	X	X	P
Large Family	X	X	X	P
Elderly and Long-Term Care	X	X	Pu, Cg	P
Group Residential	Pu	Pu	Pu, Cg	P
Multiple-Unit Dwelling[a]	Pu, Cg	P, Cg	Pu, Cg	P
Residential Facility	X	X	Pu, Cg	P
Senior Citizen Housing	Pu, Cg	X	Pu, Cg	P
Transitional Housing[b]	X	X	Pu, Cg	P
Emergency Shelters			P	
Two Unit Dwelling (duplex)[c]	X	X	X	C

Key: P: Permitted by right; Pg/Pu: Permitted on ground floor or upper floors only, respectively; C: Conditional use permit required; Cg: Conditional permit required for ground uses; Cu: Conditional permit required for uses on upper floors; X: Prohibited new (existing may remain); CL Conditional Limited (allowed where existing; new uses allowed within existing retail or office only as ancillary use).

[a] Multi-family entrance lobbies allowed on ground floor in the Active Use Frontage Overlay (AUFO).

[b] Transitional and Supportive Housing, as well as Emergency Shelters, will be permitted in all multi-family residential zoning districts per Program H4.2, Zoning Code Amendments to Remove Constraints.

[c] Duplex uses subject to objective design review standards pursuant to BZ0 Section 13A.

Source: Zoning Ordinance; City of Belmont Planning Department.

During previous planning period, the City of Belmont used the PD District to facilitate the construction of various types of housing. The City used the PD process in October 2014 (prior to the City's current regulations that encourage housing) to entitle a mixed-use project with housing units over retail Downtown at 576-600 El Camino Real. In October 2021, the City approved a 16-unit market rate townhome project at 800 Laurel Street with a PD zoning designation that allowed the project to provide medium-density residential housing (townhomes) near the Belmont Village Specific Plan area and the Belmont Caltrain Station. The City does not anticipate significant development in the planning period with a PD designation, given the current policy framework, but it provides an additional tool for unique or challenging sites.

RESIDENTIAL DEVELOPMENT STANDARDS

Development standards can sometimes constrain the number of units that may be constructed on a particular property to a level below the maximum density. Critical standards include setbacks, height, parking, and open space requirements. By limiting the number of units that could be constructed, the per-unit land costs would necessarily be higher and, all other factors being equal, result in higher development costs which could impact housing affordability. Development standards are typically a major constraint on small lots zoned for multi-family

development, where setbacks and parking requirements can consume a sizable percentage of the total lot. Larger lots, such as those over an acre in size, can more easily achieve the allowed density.

Over the past two planning periods, Belmont has made significant revisions to land use and zoning standards for residential and mixed-use zoning districts throughout the city, including adoption of the Belmont Village Specific Plan and related Belmont Village zoning districts, and establishing a new CMU zoning district. These efforts, completed in 2017, included analysis of zoning standards and adoption of form-based codes that allow maximum flexibility for developers and do not discourage development of multi-family projects in Belmont. The 1,023 new housing units as pending and pipeline project are attributable to these revised development standards.

Table 4-6 details the City's residential development standards for the zones allowing housing. Table 4-7 details development standards in the Belmont Village zoning districts.

While the City strongly believes that current development standards in the Belmont Village districts and CMU zoning district do not preclude projects from achieving full development capacity, it is important that the City commit to ongoing evaluation of development standards and entitlements that have the potential to detrimentally impact the cost and supply of new housing, and the ability for developers to achieve market-feasible densities. The City has included Program H4.7, Evaluation of Zoning Constraints, which commits the City to monitor and analyze the interrelationship between the zoning standards, objective design standards, and State Density Bonus to identify and remove constraints to housing development. In addition, the City will conduct a peer agencies evaluation of zoning standards such as height and open space requirements as part of the analysis.

OPEN SPACE REQUIREMENTS

To ensure adequate open space is provided in multi-family housing, the Zoning Ordinance requires minimum open space requirements in the R-3, and R-4 zones and Belmont Village zoning districts. Residential developments are required to provide a minimum of 300 square feet of open space for each unit located on the ground floor, and an additional 150 square feet of open space for each unit located above the ground floor. The Village Zoning districts require 200 to 300 square feet up publicly accessible open space per unit. The following may be used to satisfy the open lot area requirement for each unit above the first floor: open roof decks, balconies, lanais, or other open structural areas made a part of the building and improved for outdoor living. These open space requirements have not been a constraint to housing development, as demonstrated by the large number of pipeline and pending projects.

TABLE 4-6: RESIDENTIAL ZONING DEVELOPMENT STANDARDS

	HRO[a]	R-1[b]	R-2	R-3	R-4	CMU
Building Standards						
Density Range (du/ac)	0.108–1.452	1–7	14 or less	20 or less	30 or less	No max.[c]
Minimum Floor Area/Unit (sf)	900–1,200[e]	1,200	None specified	0-Bedroom = 420 1-Bedroom = 600 2-Bedroom = 780 3-Bedroom = 960		1,450
Maximum Building Height (ft)	28	28	35 (2 stories[d])		50	45-55
Maximum Floor Area Ratio	4,500 sf max. on lots 20,000 sf or larger; 3,500 sf on all other lots	0.27–0.53[e]	0.6	0.85	1.4	1.75-2.2
Lot Standards						
Minimum Lot Area (sf)	30,292–403,333	5,000–9,600	6,000	6,000	6,000	7,200
Minimum Lot Width	60	50-70	60	60	60	60
Building Setbacks and Open Space						
Front Yard (ft)	15	15-25	15-25	15	15	0[e]
Side Yard (ft)	15	6-25	6-25	6-15	15	0
Rear Yard (ft)	7	15-30	15-30	15	15	0
Open Space Required (sf)	N/A	N/A	N/A	300 sf each ground floor unit, plus 150 sf each unit above ground floor[f]		

[a] There are three HRO districts: HRO-1, HRO-2, and HRO-3.
[b] There are five R-1 districts. R-1A, B, C, E, and H.
[c] The maximum density in the CMU District was previously 45 units per net acre, which could be increased to 60 units per acre with provision of community benefits. The City eliminated the CMU maximum density in January 2024.
[d] There are a very limited number of sites in Belmont still zoned R-2 and R-3, see additional discussion of these zoning districts in the Multi-Family Zoning section.
[e] Depending on slope.
[f] Ground floor residential subject to 10 feet front yard; 5 feet plus 2 feet per each additional story above three stories, side yard; and 15 feet rear yard.
Sources: City of Belmont General Plan; Zoning Ordinance, City of Belmont.

TABLE 4-7: VILLAGE ZONING DISTRICT DEVELOPMENT STANDARDS

	Village Core (VC)	Village Station Core (VSC)	Village Corridor Mixed-Use (VCMU)	Village High-Density Residential (VHDR)
Lot Size, Setbacks, Density, and Lot Coverage				
Minimum Lot Area (sf)	5,000	7,200	7,200	7,200
Minimum Lot Width (ft)	50	60	60	60
Minimum Setbacks	None except when a lot abuts a lot in a residential zoning district			
Minimum; Maximum Residential Density (du/ac)	N/A	N/A	N/A	21; 45-60 w/comm. benefits
Maximum Site Coverage (% of Lot)	90	80	80	80
Building Form and Street Frontage Standards				
Minimum; Maximum Floor Area Ratio (FAR)	0.5; 2.0 (2.5 w/ community benefits)	0.2; 2.0[a] (2.5 w/ community benefits)	0.5; 2.0 (2.5 w/ community benefits)	N/A
Minimum; Maximum Building Height (ft)	20; 50 (65 w/community benefits)	20; 45 (60 w/community benefits)	None; 50 (65 w/community benefits)	None; 55
Minimum Ground Floor Height (ft) – Active Use Frontage Overlay Zone – Non-Residential – Residential	 16 16 10	 16 12 10	 N/A 12 10	 N/A 12 10
Building Bulk (Maximum Floorplate as Percent of First Floor Footplate)	1-story: 100% 2-story: 100% 3-story: 85% 4+ story: 70%	1-story: 100% 2-story: 100% 3-story: 85% 4+ story: 70%	1-story: 100% 2-story: 100% 3-story: 85% 4+ story: 60%	1-story: 100% 2-story: 100% 3-story: 85% 4+ story: 60%
Limitations on Blank Walls	Yes	Yes	Yes	Yes
Build-to Lines	Yes	Yes	Yes	No
Ground Floor Transparency	Yes	Yes	Yes	No
Building Entrances	Yes	Yes	Yes	Yes
Street Frontage Standards	Yes	Yes	Yes	Yes
Open Space and Outdoor Living Area for Residential Units				
Minimum Publicly Accessible Open Space Area (SF)				
Lots <12,000 sf	N/A	N/A	N/A	N/A
Lots ≥12,000 sf	300	300	200	N/A
Minimum Dimensions (ft)	15	15	10	N/A
Minimum Outdoor Living Area per Unit (sf)	36	36	36	80
Minimum Landscaping (% of Lot)	10	10	10	10

Sources: City of Belmont General Plan; Zoning Ordinance, City of Belmont.

PARKING REQUIREMENTS

The City's parking requirements vary depending on housing type and anticipated needs. Table 4-8 summarizes the City's existing parking requirements. The City's parking requirements display flexibility to facilitate the development of housing for special needs groups. For instance, nursing homes and senior congregate care facilities are required to provide only one space per four beds while dormitories and other student housing are required to provide only one space per every five beds.

TABLE 4-8: RESIDENTIAL ZONES PARKING REQUIREMENTS

	Spaces Per Unit		
Housing Type	**Covered**	**Open**	**Total**
Single-Family	2	2	4
Accessory Dwelling Units	0	0	0
Multi-Family (R-2, R-3, R-4)	1	1	2
Multi-Family (CMU, RC, Village Districts)			
Minimum	Studios: 0.5 spaces minimum per unit 1 Bedroom: 1 space minimum per unit 2 Bedroom: 1.5 spaces minimum per unit 3 Bedroom or more: 2 spaces per unit		
Maximum	2 spaces per unit + 0.5 spaces per unit for guest parking		
Nursing/Convalescent	One space per four beds		
Student Housing	One space per five beds		

Source: City of Belmont Planning Department, Zoning Ordinance.

While parking standards are not currently constraining multi-family residential development in Belmont, the City anticipated the possibility of parking constraining development at a future time and put policies in place to address that possibility. The BVSP identified shared Downtown parking facilities as a development preference to consolidate parking in the Belmont Villages, and to offer relief to developers of small parcels. Additionally, housing built as part of a mixed-use project within 300 feet of a train station, or within the Belmont Village area, may receive a 15% reduction in the required parking spaces. Housing developers have regularly received a parking reduction as a regulatory incentive for Density Bonus projects. It is important to note that AB2097 dramatically changed the regulatory scheme for parking near transit. All of the BVSP area is within ½ mile of the Caltrain station, so no parking is required for housing projects in those districts.

Nearly all R-3 and R-4 properties in Belmont are already developed or entitled with higher-density residential housing—including existing parking spaces—and are unlikely to be redeveloped with new housing projects. There are only two smaller parcels zoned R-3 that are vacant and do not have development entitlements. The requirement for one covered and one uncovered parking space for units in the R-3 and R-4 zoning districts is not likely to constrain any new housing development activity during the next planning period. The City contains two

small clusters of parcels zoned R-2 Duplex Residential, all of which have been developed with housing and are not likely to be redeveloped during the next planning period.

While the existing parking standards do not constrain housing development, the City has added Program H4.4, Reduce Parking Requirements, which directs the City to modify the parking requirements in the R-2, R-3, and R-4 zoning districts to reduce parking requirements consistent with other multi-family zoning districts (CMU and Village districts). It should also be noted that large majority of R-2, R-3, and R-4 properties are located within ½-mile of public transit and are not subject to minimum parking standards under AB 2097.

Single-Family Residential Design Standards

In 2011, the City adopted Single-family Residential Design Guidelines which provide clear guidance to property owners and developers on compliance with both property development standards, as well as the entitlement findings that must be made for approval of a Single-Family Residential Design Review project. The Guidelines have proven to be very useful in clarifying the City's expectations for development of Single-family Residential properties.

In 2014, the Belmont City Council established a subcommittee to review the single-family development standards and design review process to determine whether revisions would be appropriate to help streamline the development and permitting process for single-family residential development and improvement projects. This subcommittee conducted a survey of several adjacent communities to compare development standards.

One of the conclusions from this survey was that Belmont's setback and parking requirements are inconsistent and inflexible, not allowing for exceptions to be made to address common scenarios that exist within Belmont's single-family residential neighborhoods. In 2018, the City adopted amended design review regulations for single-family and duplex residential development, offering updated objective design standards. These regulations, as augmented by the Residential Design Guidelines, provide a more simple, predictable, and consistent framework for review of residential projects, and allow for more improvement projects to be approved administratively by the Zoning Administrator. Since 2018, Belmont has seen an increase in single-family residential improvement projects.

On- and Off-Site Improvements

As the majority of Belmont is built out, new housing developments are not required to complete the vast infrastructure improvements that may be needed in more rural communities. Most new housing development occurs on lots served by an existing network of streets and utility infrastructure. The Belmont Municipal Code and the Belmont Subdivision Ordinance provide details for on- and off-site infrastructure improvements that are required for new development in Belmont. Additionally, the Belmont Village Specific Plan, the Ralston Avenue Corridor Study, the Alameda de las Pulgas/San Carlos Avenue Corridor Study, and the

Comprehensive Pedestrian and Bicycle Plan identify infrastructure improvements that are necessary throughout the city to ensure safe transportation and quality of life.

The Public Works Department has developed detailed engineering standards and conditions that work in combination with the Municipal Code and adopted plans to ensure minimum levels of design and construction quality are maintained and adequate levels of street improvements are provided to serve new development. Per these adopted regulatory documents, minimum right-of-way widths in most of the city are already established and vary depending upon the street typology (i.e., highways, arterials, collectors, or local streets as defined in the Belmont General Plan).

The most common improvements for a typical new residential development include upgrading sewer mains as needed if they are aged or insufficient to meet needed capacity due to the new development, upgrading water mains as needed if they are aged or insufficient to meet fire safety requirements, restoration of streets surrounding the development site, and reconstruction of frontages when necessary to accommodate the new development project. New subdivisions are required to construct sidewalks if none exist and where there are existing sidewalks, the sidewalks are evaluated and required to meet current sidewalk standards, including ADA requirements.

For infill developments, exceptions may be reviewed and considered by the City's Public Works Director on a case-by-case basis as part of the City's development review process, provided that the alternative design meets safety and ADA requirements. The street design guidelines and standards have a potential to affect housing costs; however, they are necessary to provide a minimum level of design and construction quality in the city's neighborhoods, ensure the community's ability to access housing developments and maneuver around it on safe surfaces, and meet ADA requirements. From an equity standpoint, the minimum standards help to ensure that improvements are of a consistent quality regardless of the average income in the neighborhood.

The on- and off-site improvement standards imposed by the City are typical for most communities and do not pose unusual constraints for housing development. While these improvements may increase the cost of development, it is important to note that adequate sewer, water, street, and accessible sidewalk infrastructure are a necessary component of a healthy, equitable, and productive city. Additionally, conditions of approval to complete on- and off-site improvements are provided to applicants in a timely manner and do not have a significant impact on project timing.

Inclusionary Zoning Requirements

In 2017, Belmont adopted an inclusionary housing ordinance requiring certain residential and non-residential developments to mitigate project impacts on the local need for more affordable housing. Prior to ordinance adoption, the City participated in the San Mateo Countywide Grand Nexus Study that provided the technical and legal justification for an inclusionary housing requirement (Table 4-9).

TABLE 4-9: INCLUSIONARY ZONING REQUIREMENTS AND FEES

Project Tyle	Requirement	Alternative Means of Compliance
Large Ownership Projects (25+ Units)	15% Moderate Sale	15% Low Rental
Small Ownership Projects (< 25 units)	Mitigation Fee ($25/sf)	15% Moderate Sale, or 15% Low Rental
Large Rental Projects (25+ Units)	15% Low	n/a
Small Rental Projects (< 25 units)	In Lieu Fee ($25/sf)	15% Low Rental
Non-Residential Projects	Mitigation Fee ($25/sf)	Mitigation Fee
Mixed Use Projects	Proportional	Proportional

Notes:
1. The number of affordable units required is calculated based on the number of dwelling units in the residential project, excluding any density bonus units (inclusionary amount determined by base allowed density, developer must submit base density calculation along with density bonus request).
2. The Housing Mitigation Fees are adjusted annually by City Council with adoption of the Master Revenue Schedule.
   Projects Exempt from Inclusionary Requirements:
   - One unit on an existing lot;
   - Accessory dwelling units (ADU);
   - Property owned by the State of California;
   - Projects operated by non-profit organizations to provide food storage, meal service, or temporary shelter to homeless;
   - Non-residential projects involving no more than one employee; and
   - Any non-residential project otherwise determined to be exempt by the City Council.

Source: City of Belmont Planning Department.

The City prepares an annual financial report of all development impact and in-lieu fees, including the inclusionary housing fees paid by projects with less than 25 units (Housing Mitigation fees). The Fiscal Year 2022-23 Development Fees Annual Report reflected a fund balance of $2,571,617, including loans receivable totaling $2,351,473, for an available cash balance of $220,144. In FY 2023-24, the City has collected $599,866 in inclusionary housing fees to date from the Firehouse Square Phase II project. The City does not anticipate any additional inclusionary housing payments this year.

With a total of 1,023 housing units currently as pending and pipeline projects (508 under construction or recently completed, 306 units approved, and 209 in development review), the City has not seen any discernable constraint of the inclusionary housing ordinance on housing production since the inclusionary ordinance was adopted in 2017. In part, this is because developers can receive substantial density increases through the State Density Bonus Program. In addition, the discontinuance of the density metric incentivizes developers to include more units than previously permitted. With clear requirements and guidelines, a template regulatory agreement, and experienced planning staff, the process of implementing the ordinance and ensuring developers comply with the requirements has been smooth.

Housing Program H2.2, Manage Portfolio of Deed Restricted Affordable Units, directs the City to seek and retain a housing service provider to manage the increasing portfolio of restricted affordable housing units to ensure ongoing compliance. Housing Element Program H5.3, Modify the Inclusionary Housing Program, directs the City to modify the inclusionary housing ordinance to incentivize lower-income housing units (extremely low and very low).

ZONING FOR A VARIETY OF HOUSING TYPES

Housing Element law specifies that jurisdictions must identify adequate sites to be made available through appropriate zoning and development standards to encourage the development of various types of housing for all economic segments of the population. This includes single-family housing, multi-family housing, factory-built housing, mobile homes, emergency shelters, and transitional housing, among other housing types.

A review of the City's Zoning Code shows that many types of housing are permitted in the community. The following analyzes the City's allowance of various housing types.

MULTI-FAMILY HOUSING

In Belmont, multi-family units comprise approximately 36% of the existing housing stock. Multi-family residential uses are allowed by right (no CUP required) in the R-3 and R-4 residential zones. Duplexes are permitted by right in the R-2, R-3, and R-4 and conditionally permitted in the Village High-density Residential (VHDR) district, where higher-density housing is typically preferred. Clustered dwelling units and townhomes are permitted in the Hillside Residential & Open Space (HRO) zoning districts with approval of a CUP; this requirement is appropriate given the challenging hillside terrain, vegetation, and access issues that exist for HRO properties in Belmont.

MIXED-USE DISTRICTS

Multi-family residential housing developments are the foundation of the vision for the Belmont Village districts and CMU district along El Camino Real. The City seeks a vibrant, walkable district around the Caltrain Station with sufficient commercial uses to support the residents. To support that vision, the City permits residential uses on the upper floors as a permitted use and requires a Conditional Use Permit (CUP) to allow residential on the ground floor of those buildings. Specifically, in the Belmont Village zoning districts, a CUP is only required if a residential use in the portion of the project within 60 feet of a public street; residential uses are allowed on the remainder of the first floor. In the CMU district the regulations require a CUP if residential uses are proposed anywhere on the ground floor, but would be looked at favorably if the portion near the street is commercial while the rear of the first floor is used for residential uses. If a housing project has a mixed-use component, with a commercial use on the ground floor, then a CUP is not required. The CUP findings were written to support the vision for the area while not acting as a deterrent to residential development. To make this determination, the Planning Commission must consider whether:

- the layout and street orientation of the site are conducive for the operation of ground floor commercial;
- the project would replace an existing retail or restaurant use on-site;
- there are existing commercial uses within ¼ mile of that project that would meet the needs of the building occupants; and
- if the project would provide 30% or more units of affordable housing.

The City has a strong record of completed and approved multi-family developments, even with the CUP requirement for housing on the ground floor. The requirement for a commercial use on the ground floor has been implemented in a reasonable way through the development review process. Recent projects include a traditional commercial space such as a quick serve restaurant or small retail space, or a flex/community space on the ground floor. For the 100% affordable projects recently approved, the City has encouraged the more active uses, such as the leasing office or community space, that are designed to activate the streetscape in lieu of a commercial space.

With strong housing production/development trends in the mixed-use districts, the City has not found the CUP requirement to be a constraint to residential development. As described in *Chapter 6, Adequate Sites*, the housing opportunity sites in the CMU and Village zoning districts are anticipated to continue supporting residential development.

The mixed-use districts in Belmont allow commercial uses as well as residential; however, the market demand for non-residential development in the Belmont Village area is low and the City has not had any applications approved for 100% commercial uses in these districts since the adoption of the General Plan and Belmont Village Specific Plan in 2017. In the CMU district, the only commercial proposal the City has received is a preliminary plan to demolish an existing motel and build a new hotel at the same location. Due to market dynamics and the physical layout of the mixed-use districts, it is unlikely that non-residential uses would outperform residential uses and act as an impediment to housing production.

In the Belmont Village and CMU districts, retail and restaurant uses are allowed but are expected to be located on the ground floor of multi-story buildings and are therefore not an impediment to housing production. Office uses are allowed in these districts but it is unlikely that major office uses would locate in the mixed-use districts because there are other locations in the City that are better suited for major office development. Since 2017, there have been no proposals for office development in these areas, even before the slowdown in office demand resulting from the COVID-19 pandemic. Smaller, locally serving office may develop over time but the City has not received any proposals for those types of uses since 2017. The City expects demand for research and development uses in other parts of the City but that use is not allowed in the mixed-use districts (other than one district, where a CUP is required). The small lot size and more constrained street pattern are not conducive to research and development uses in this area. Therefore, the City does not anticipate receiving applications for 100% commercial projects in the mixed-use zones. Program H4.9 commits the City to monitor commercial development in mixed-use zones and make necessary changes if trends change during the planning period.

As shown in Table 4-10, there are six projects and 670 units in the Village and CMU zoning districts, which demonstrates demand and conducive development standards for residential development.

TABLE 4-10: PIPELINE AND PENDING PROJECT IN MIXED-USE DISTRICTS

Address	Ground Floor Use	Total Units	Zoning	Status
Firehouse Square 1	Retail/Community	66	VC	Completed 2023
Firehouse Square 2	Residential	15	VC	Completed 2024
815 Old County Road	Leasing Office/Community	177	VCS	Completed 2024
1325 Old County Road	Community/Flex	250	VCMU	Completed 2024
803 Belmont Avenue	Leasing Office/Community	125	CMU	Approved
Hill Street at El Camino Real	Leasing Office/Community	37	BVSP	Approved
TOTAL		**670**		

Source: City of Belmont, 2024.

EMERGENCY SHELTERS

An emergency shelter is any facility with overnight sleeping accommodations, the primary purpose of which is to provide temporary shelter for the homeless, in general, or for specific populations of homeless persons. The length of stay can range from one night up to six months. In Belmont, emergency shelters are permitted by right in the S-2 Emergency Shelter overlay district, which includes 31 parcels in the CMU zoning district.

The purpose of the S-2 Emergency Shelter overlay district is to ensure that certain qualifying shelters with 16 or fewer beds can be built with no subjective entitlement review (building permit only) and are obligated to meet the basic performance standards related to client intake, hours of operation, services provided, kitchen, sanitation, storage, and security. The emergency shelter structures must meet the development regulations of the underlying CMU zoning district, which will be amended to eliminate the residential density maximum.

The S-2 district is located a short walk from Downtown Belmont, close to both the Caltrain station and the El Camino Real transit corridor, allowing easy access to social services and retail to meet daily needs. Permitted uses in the CMU district include both retail and residential in a compact, pedestrian-oriented setting. Enhanced multi-modal transportation options serve the CMU and S-2 districts.

Two parcels in the S-2 Emergency Shelter overlay district are included on the Sites Inventory, both of which are more than one acre in size and have the capacity to accommodate a large number of new housing units, including lower-income units. The City of Belmont's existing requirements for the location of shelters includes the following.

> 21.3 S-2 EMERGENCY SHELTER COMBINING DISTRICT
>
> (a) S-2 District Established. The S-2 Emergency Shelter combining district comprises that certain area situated within the City of Belmont and described on the following map is an S-2 district. The City of Belmont Zoning Map was amended to include the S-2 district as shown in Figure 4.4.

(b) S-2 District Purpose. The purpose of the S-2 Emergency Shelter combining district is to establish a district with sufficient capacity to accommodate the need for emergency shelters where emergency shelters are permitted without a conditional use permit or other discretionary action, as required by Government Code Section 65583.

(c) Emergency Shelter Defined. "Emergency Shelter" is defined by Health and Safety Code section 50801(e) and does not include: (i) transitional housing or (ii) temporary shelter provided by general relief in the wake of a disaster.

Figure 4-4: S-2 Emergency Shelter Combining District



(d) Permitted and Conditionally Permitted Emergency Shelter Uses.

(1) Permitted Use. Emergency shelters are permitted within the S-2 district without a conditional use permit or other discretionary review when:

(A) The shelter has sixteen (16) or fewer beds serving no more than sixteen (16) homeless persons at one time and

(B) The cumulative number of either emergency shelter beds or persons served at one time in the S-2 district does not exceed sixteen (16).

(2) Conditionally Permitted Use. An emergency shelter within the S-2 district with more beds or serving more people than the cumulative number of beds or persons served at one time in subsection (d)(1)(B) requires a conditional use permit.

(e) Development Regulations. An emergency shelter shall conform to all development regulations of the zoning district in which it is located, except off-street parking shall be provided as set forth in the table below. The Community Development Director may reduce the parking requirement if the shelter can demonstrate a lower need. All required parking spaces and access thereto shall conform to the City parking design standards. Modifications to the development regulations of the underlying zoning district may be permitted subject to approval of a conditional use permit by the Planning Commission.

TABLE 4-11: PARKING STANDARDS FOR EMERGENCY SHELTERS

Type	Parking Spaces	
Vehicular	Per employee or volunteer on duty when the shelter is open to clients	1 space
	Per family	0.50 space
	Per non-family bed	0.25 space
Bicycle	Per bed	0.25 space

Source: Zoning Ordinance; City of Belmont Planning Department.

(f) Performance Standards. Emergency shelters shall conform to the following performance standards. A modification to a performance standard may be permitted subject to approval of a conditional use permit.

(1) Waiting and Client Intake Areas. Shelters shall provide ten (10) square feet of on-site, interior waiting and client intake space per bed. In addition, one (1) office or cubicle shall be provided per ten (10) beds, with at least one (1) office or up to 25% of the offices designed for client privacy. Waiting and intake areas may be used for other purposes as needed during operations of the shelter.

(2) Facility Requirements. Each facility shall have a written management plan that uses best practices to address homeless needs (e.g., quality assurance standards developed by the San Mateo County HOPE Quality Improvement Project) which shall include, at a minimum, the following.

(A) On-Site Management. On-site personnel are required during hours of operation when clients are present.

(B) Hours of Operation. Facilities shall establish and maintain set hours for client intake and discharge. The hours of operation shall be consistent with the services provided and be clearly posted.

(C) Services. Facilities shall provide overnight accommodation and meals for clients. Staffing and services or transportation to such services shall be provided to assist clients to obtain permanent shelter and income.

(D) Kitchen. Each facility shall provide a common kitchen and dining area.

(E) Sanitation. Each facility shall provide restrooms and shower facilities for client use.

(F) Storage. Each facility shall provide a secure area for storage of client personal property.

(G) Coordination. The shelter operator shall establish a liaison staff to coordinate with city, police, school district officials, local businesses, and residents on issues related to the operation of the facility.

(H) Exterior Security Lighting. Adequate external lighting shall be provided for security purposes. The lighting shall be sufficient to provide illumination and clear visibility to all outdoor areas, with minimal spillover on adjacent properties. The lighting shall be stationary, directed away from adjacent properties and public rights-of-way, and compatible with the neighborhood.

(I) Security. On-site security shall be provided during the hours of operation when clients are present.

(g) Compliance Review Procedures. An emergency shelter facility shall be reviewed for compliance with all development regulations and performance standards prior to occupancy of the facility, where a use permit is not required.

(1) Request for Compliance Review. Requests for compliance review shall be made in writing by the owner of the property, lessee, purchaser in escrow, or optionee with the consent of the owners. The request shall be accompanied by a project description explaining the details of the proposal, and both site and building floor plans.

(2) Compliance Determination. The Community Development Director or designee shall make a determination of compliance in writing after reviewing the request materials and considering any comments received. The determination of the community development director is final and not subject to appeal.

Based on analysis of these requirements against those of AB 2339 and other provisions of State law, the City's current emergency shelter requirements contain constraints that will be eliminated through amended policies in this Housing Element. The constraints found include the following.

1. The definition of emergency shelters does not include associated uses such as low barrier navigation centers, bridge housing, respite/recuperative care, and other inclusive terms for shelters.
2. The parking requirements address more than staff parking, and do not reflect the requirements of AB 139.

The following standard is not currently a constraint, but could be in the future, and therefore will be amended as outlined in Program H4.2. Zoning Code Amendments to Remove Constraints.

1. The 16-bed maximum for by-right approval, which currently covers the number of Belmont's homeless population as counted in the biennial homeless counts, would not cover potential increases over time, as shown in the growth of that population over the last five years. In 2017, there were three unsheltered persons, seven in 2019, and 13 in 2022. Given this trend, the City commits to increasing the maximum number of beds by-right to 20, with a mid-cycle review to determine any changes that might be needed to the City's bed limit. Based on this proposed increase, it is presumed that the square footage needed would be 4,000 square feet. As the density maximums are also being removed from this zone, the size would not be a constraint. It should be noted that a CUP would still be required for larger developments greater than 20 beds.

Additional requirements that are not constraints include the following.

1. Requirements for waiting rooms.
2. Provision of onsite management. This presumes that hours of operation, services, kitchen facilities, sanitation, storage facilities, coordination requirements, and ongoing compliance review are included in onsite management provisions.
3. Lighting.
4. Security.

This Housing Element includes Program H4.2 Zoning Code Amendments to Reduce Constraints, includes actions to amend the Zoning Ordinance to address the identified constraints.

TRANSITIONAL AND SUPPORTIVE HOUSING

Transitional housing is defined as a project that is designed to provide housing and appropriate support services to homeless persons to facilitate movement to independent living within 24 months. Transitional housing may also be used for youth leaving the foster care system.

Supportive housing is defined as long-term community-based housing and supportive services for persons with special needs. The intent of this type of housing is to enable these special needs populations to live as independently as possible in a permanent setting.

The Belmont Zoning Ordinance includes definitions of both transitional and supportive housing and clarifies that both are considered a permitted residential use and only subject to those restrictions that apply to other residential dwellings in the same zone. Housing Element Program H4.3, Zoning Code Amendments to Remove Constraints, identifies an action to evaluate the Zoning Ordinance and update as needed to comply with AB 2162 and related State laws.

APARTMENT HOTEL, EFFICIENCY UNITS, OR SINGLE ROOM OCCUPANCY UNITS

Apartment hotel, efficiency units, or single room occupancy (SRO) units are a type of housing that serves very low-income households. The Belmont Zoning Ordinance defines this type of housing as a dwelling unit containing only one habitable room for occupancy by no more than two (2) persons and containing a minimum of 220 square feet of living space. These units are considered a residential use and subject only to those restrictions that apply to other residential dwellings of the same type in the same zone.

MANUFACTURED HOUSING AND MOBILE HOME PARKS

State housing law requires communities to allow manufactured housing by right in all residential zones, and to allow mobile home parks as a special use in all residential zones (Government Code Section 65852.7). In Belmont, manufactured housing is allowed in all residential zones subject to the same objective design review requirements as site-built housing. The Belmont Zoning Ordinance permits mobile home parks in the M-1 manufacturing zone with a Conditional Use Permit.

Housing Element Program H4.3, Zoning Code Amendments to Remove Constraints, identifies an action for the City to amend the Zoning Ordinance to allow mobile home parks as a special use in all residential zones, consistent with State law.

ACCESSORY DWELLING UNITS

Accessory dwelling units (ADUs) are a source of housing units that is often lower cost to develop, occurs in established and high-resourced neighborhoods, and offers naturally

affordable units based on size. The City complies with State law requirements for the processing of ADUs and has seen in increase in ADU production as State law has become more permissive. In the year 2018, the City issued a total of eight ADU building permits. By 2022, the number increased to 27. In 2023, the numbers remained high at 21 building permits issued. Belmont has not identified any constraints to ADU development but has identified ways to further encourage ADU and JADU production as well as support housing mobility for lower income households. The City has included Programs H5.9, Conduct Zoning Code Amendments to Facilitate Production of ADUs and SB9 Units; H5.10, Provide Financial Support for ADUs that Serve Lower-Income Households; and H5.11, Conduct Outreach to Encourage ADU and SB9 Unit Production.

HOUSING FOR PERSONS WITH DISABILITIES

Fair Housing Law prohibits local governments from making housing opportunities unavailable to people with disabilities through discriminatory land use and zoning rules or other policies and procedures. Persons with disabilities are significantly more likely than other people to live with unrelated people in group housing, and therefore the definition of "family" can be a constraint to housing for persons with disabilities. While the City's Zoning Ordinance definition of "Family" was updated to remove outdated references to traditional family or blood relationships, the current definition still refers to a group of individuals with an "internally structured relationship providing organization and stability. "The City has added Program H4.3, Zoning Code Amendments to Remove Constraints, to update the Zoning Ordinance to further update the definition of "Family" to remove the reference to "internally structured relationship" and instead define a family as one or more persons living together in a dwelling unit, with common access to, and common use of all living, kitchen, and eating areas within the dwelling unit. This will remove a potential governmental constraint to housing persons with disabilities.

The siting of group homes is another common constraint to housing for persons with disabilities. State law requires that certain community care facilities serving six or fewer persons be permitted by right in residential zones. Moreover, such facilities cannot be subject to requirements (development standards, fees, etc.) more stringent than single-family homes in the same district. The Zoning Ordinance has been amended to provide definitions for "residential care facilities" and "small residential care facilities" (those serving six or fewer clients), and to clarify that a nursing or convalescent home is considered a residential care facility.

The revised Zoning Ordinance further clarifies that small residential care facilities are a residential use permitted in any residential zone, while large residential care facilities are currently permitted in residential zoning districts with approval of a CUP. Requiring a CUP for larger facilities serving seven or more persons with a disability is a potential governmental constraint.

Program H4.3, Zoning Code Amendments to Remove Constraints, also directs the City to eliminate the CUP requirement for all residential care facilities, regardless of size, and to allow

these types of housing facilities in all zoning districts that allow residential uses based on objective criteria. This will bring the Zoning Ordinance into consistency with State law and would remove a potential governmental constraint to housing persons with disabilities.

REASONABLE ACCOMMODATIONS

A reasonable accommodation is a change, exception, or adjustment to a rule, policy, practice, or service. The Fair Housing Act makes it unlawful to refuse to make reasonable accommodations when such accommodations may be necessary to afford persons with disabilities an equal opportunity to use and enjoy a dwelling and public and common use areas. In addition, the Fair Housing Act prohibits a housing provider from refusing to permit, at the expense of the person with a disability, reasonable modifications of existing premises occupied or to be occupied by such person if such modifications may be necessary to afford such person full enjoyment of the premises.

Requests for the installations of ramps or interior modifications are typically processed over the counter and do not require any special review. Prior to issuance of a building permit, the applicant must submit plans, which are reviewed by City staff. Applicants may remodel, add up to 400 square feet, or add exterior ramps with only ministerial approval and without a public hearing.

Belmont Zoning Ordinance Section 10 defines a simple procedure for residents to request reasonable accommodations for persons with disabilities seeking equal access to housing under the Federal Fair Housing Act and the California Fair Employment and Housing Act. The Ordinance clearly defines application requirements and permitting procedures for residents seeking these types of accommodations to ensure such requests can be efficiently processed. Requests made for a reasonable accommodation without any accompanying application for another approval--permit or entitlement--are reviewed administratively by the Community Development Director within 45 days. An application for reasonable accommodation shall be granted if the following findings are made:

1. The housing, which is the subject of the request, will be used by an individual disabled under the Federal Fair Housing Act and the California Fair Employment and Housing Act.
2. The requested reasonable accommodation is necessary to make specific housing available to an individual with a disability under the Federal Fair Housing Act and the California Fair Employment and Housing Act.
3. The requested reasonable accommodation would not impose an undue financial or administrative burden on the City.
4. The requested reasonable accommodation would not require a fundamental alteration in the nature of a City program or law, including but not limited to land use and zoning.
5. The requested reasonable accommodation would not adversely impact surrounding properties or use.

6. There are no reasonable alternatives that would provide an equivalent level of benefit without requiring a modification or exception to the City's applicable rules, standards, and practices. (b) In granting a request for reasonable accommodation, the approving authority may impose any conditions of approval deemed reasonable and necessary to ensure that the reasonable accommodation would comply with the findings required by subsection (a).

BUILDING CODES AND ENFORCEMENT

A variety of federal, State, and local building and safety codes are adopted for the purpose of preserving public health and safety, as well as ensuring the construction of safe and decent housing. At times, code requirements increase the cost of such housing. However, these codes are not considered a specific constraint on development in Belmont since all projects must comply, other jurisdictions in the region have adopted similar codes, and the purpose of the codes is to protect public health and safety. The codes the City has adopted, and other codes with which all projects must comply, include building codes, accessibility standards, energy standards, specific codes to reduce hazards, and other related ordinances.

LOCAL PROCESSING AND PERMIT PROCEDURES

Typical Processing Times

Table 4-12 describes the typical amount of time needed for various types of residential projects to be reviewed. The development review process can take 2 to 6 months for a new single-family home and 5 to 14 months for multi-family projects. Nearly all recently approved multi-family residential projects were able to reduce environmental review by utilizing the Belmont General Plan Environmental Impact Report (EIR) adopted by the City in 2017, which has significantly reduced development review processing times. For all project types, it takes the Community Development Department 30 days to determine if an application is complete. To facilitate the process, City staff meet with applicants in advance of application to review submittal requirements to increase likelihood of complete applications. If applicants do not submit the materials requested, the timeline can increase by several months.

If a multi-family developer is requesting a zone change or Planned Development (PD) to allow for more flexible development standards, the rezoning process can take up to 18 months. In most instances, multiple entitlements can be processed simultaneously to streamline the review process. For example, in November 2021 the City Council concurrently approved a multi-family residential site rezoning, conceptual development plan, detailed development plan, Conditional Use Permit, and design review at a single meeting. In addition to the zone change, there may be a variety of other issues to consider such as CEQA review, slope, grading, drainage, and/or geotechnical issues, or the existence of protected trees. The zone change combined with several of these additional issues could extend the development review process to 9 to 18 months.

TABLE 4-12: RESIDENTIAL PROJECT DEVELOPMENT REVIEW TIME FRAMES

			Time Frame for Review (Days)[a]		
Development Type	**Approval Type**	**Approving Authority**	**Determine Completeness of Application**	**Determine Environmental Review[b]**	**Maximum Time to Approve/ Disapprove Project[c]**
Single-Family					
Tier 1 – Less than 400 sf, or carport enclosures/additions that do not increase footprint	Building Permit	Building Official	30	N/A	45
Tier 2 – Less than 900 sf	Design Review	Zoning Administrator			45-60
Tier 3 – New homes, grading < 500 cy, additions > 900 sf, CEQA Required	Design Review	Planning Commission		30	60-120
Multi-Family					
EIR Required	Design Review; CUP for housing on the ground floor in CMU or village districts	Planning Commission; City Council Required for Development Agreements	30	30	270-360
Negative Declaration Required					120-240
CEQA Exempt					90-180
Accessory Dwelling Units (ADUs)					
ADU Applications Meeting All Ministerial Standards	Building Permit	Building Official	10	N/A	45

[a] Times listed for approval/disapproval do not take the time needed for any type of zoning amendment, such as the use of the PD district, into account.
[b] Time required to determine whether an environmental impact report, negative declaration, or mitigated negative declaration shall be required.
[c] Maximum time required to act (approve or disapprove a permit application) from the date environmental review is complete or the determination of categorical exemption is made.
Source: Belmont Planning Department.

The 2015-2023 Housing Element implemented a program that (1) eliminates any time used to determine the level of environmental review for secondary dwelling units, as these are generally CEQA-exempt; (2) caps the number of days needed to act on a CEQA-exempt single-family unit permit application to 60 days; and, (3) caps the number of days needed to act on a multi-family permit application that requires an EIR to 180 days (90 days if the project requires an EIR and at least 49% of the units are affordable), and to 60 days if the project requires a Negative Declaration or is CEQA-exempt.

To provide clear and efficient information on both the City website and in-person at the Permit Center, the City has developed new handouts, including a "Frequently Asked Questions" document. These documents have been extremely well received by the public.

DESIGN REVIEW

A Design Review Permit from the Planning Commission is required for multi-family housing development projects. The City's findings for a Design Review Permit for housing projects are consistent with SB330 (Housing Crisis Act) and AB678 and SB167 (Housing Accountability Act),

which require that local jurisdictions utilize a ministerial and streamlined process for specified housing projects; this streamlined process requires objective development standards to address a variety of design concerns that were typically resolved during a discretionary process in the past.

Government Code Section 65913.4 (5) defines objective standards as:

> *"Standards that involve no personal or subjective judgement by a public official and are uniformly verifiable by reference to an external and uniform benchmark or criterion available and knowable by both the development applicant or proponent, and the public official prior to submittal."*

In accordance with the requirements of state law, a ministerial process for review of qualifying housing development projects has been included in Belmont Zoning Ordinance Section 13.5.1 (Design Review). The required findings are directly from State law and read in the negative, as the review authority is required to approve the project unless the findings can be made.

(a) The reviewing body must approve or conditionally approve Design Review for a project that is defined as a "Housing Development Project" by the Housing Accountability Act (Government Code Section 65589.5(h)(2)) unless it makes one of the following findings supported by a preponderance of the evidence in the record:

1. *The project does not comply with all applicable objective general plan, zoning, subdivision, and development standards including objective design review standards.*
2. *The project would result in a specific adverse impact to public health and safety that cannot be feasibly mitigated without denying the project or reducing its density.*

These are the only findings for multi-family design review. There is no subjective analysis in the design review process.

Belmont has a Tiered System of review for the Single-Family Design Review (SFDR) process. The level of review (tier) is dependent on the scope of the project. For example, small ground floor additions are reviewed at a staff level. Larger ground floor additions and upper floor additions are reviewed by the Zoning Administrator. New single-family homes and large upper floor additions are reviewed by the Planning Commission.

Belmont's Residential Design Criteria (RDC) is a companion document to the Zoning Ordinance, which provides additional, objective, measurable, or quantifiable review criteria required for new construction. The RDC includes relevant criteria for the regulation of building bulk (such as second story step backs, prescribed articulation, and daylight planes), which are specified based upon the scope of the project, site conditions, and the architectural style of the home. New homes and additions must comply with the RDC if the new construction: (a) includes a ground floor plate height that exceeds 12 feet or a roof height that exceeds 18 feet (as measured from finished grade), or (b) creates or expands an upper floor. The RDC standards are available on the City's website: https://www.belmont.gov/home/showpublisheddocument/13391/635973497473800000.

All new single-family residential structures, and additions must be consistent with the City's established Residential Design Guidelines (RDG). The RDG include basic design concepts and elements of good design. The purpose of the RDG is to provide clear guidance to property owners and developers. They help applicants prepare project plans by: 1) providing an overview of the SFDR Findings that the review authority must make in order to approve a project; and 2) providing relevant examples of designs that are in general agreement with the SFDR Findings. The RDG have proven very useful in clarifying the City's expectations for development of single-family residential properties and have helped streamline the entitlement review process by reducing the number of non-compliance or incomplete items.

The Multi-Family objective design standards, RDG, updated zoning standards, and simplified residential design review process have ensured that applicants, community members, City Council, Planning Commission, and City staff know the review criteria and understand the applicable design review principles at the outset of a project, helping to streamline and add more clarity to the project review process. The City currently has 1,023 housing units as pending and pipeline projects and expects to receive several more large housing project applications during the planning period. Therefore, the City concludes that the design review process is not a constraint to housing development. Clear and objective zoning standards, guidelines, and experienced staff have made the Design Review process more streamlined for developers.

Conditional Use Permits

Multi-family residential uses on the ground floor in the CMU or Village Districts require a CUP granted by the Planning Commission. Multi-family residential uses above the ground floor in these districts, and in other residential zoning districts, are permitted by right. Please see the discussion under the Zoning for a Variety of Housing Types – Mixed-Use Districts subheading earlier in this chapter. If a CUP is required, it is processed concurrently with the design review and does not add to the approval timeline.

Environmental Review

The City facilitates environmental review as required by CEQA. To streamline new development, the City certified a Program Environmental Impact Report (EIR) for the comprehensive General Plan Update, Belmont Village Specific Plan and Climate Action Plan in 2017. The certification of that Program EIR allows the City to process most housing projects under Section 15183 of the CEQA Guidelines. Environmental analysis is limited to consistency with the General Plan EIR, associated Mitigation Measures, and requirements of Guidelines Section 15183. This approach has resulted in significant streamlining of housing projects. Additionally, SB35 procedures require a ministerial process without CEQA review for certain affordable housing projects. If a project does require a Negative Declaration, Environmental Impact Report, or other form of CEQA documentation, the City follows Public Resources Code 21080.1 and 21080.2, related to processing times.

SENATE BILL 35 APPROVAL PROCESS

Senate Bill (SB) 35, passed in 2017, requires jurisdictions that have not approved enough housing projects to meet their RHNA to provide a streamlined, ministerial entitlement process for housing developments that incorporate affordable housing. Per SB 35, the review and approval of proposed projects with at least 50% affordability must be based on objective standards and cannot be based on subjective design guidelines. However, to be eligible, projects must also meet a long list of other criteria, including prevailing wage requirements.

For applicants to take advantage of SB 35, per Government Code Section 65913.4(10)(b)(1)(a)(et seq.), they must submit a Notice of Intent and jurisdictions need to give Native American tribes an opportunity for consultation. In 2020, the City of Belmont amended the Zoning Ordinance to ensure that only objective development standards are utilized in analysis of housing projects, and to establish a ministerial review process for qualifying housing projects. Belmont eliminated the requirement for a Conditional Use Permit for new multi-family housing constructed within a multi-family district. These steps further streamline the pre-application and design review process to introduce efficiencies during planning application reviews.

The City of Belmont has identified Housing Element Program H4.6, Update the City's Webpage to Provide Enhanced Information for Housing Developers, to update the City website with information and resources for SB 35 streamlined ministerial review, including provision of a Notice of Intent form and information about the process, making it easy for developers to consider this option. The City processed its first SB 35 streamlined development application for a 37-unit 100% affordable project on El Camino Real at Hill Street and the project was approved in February 2023. As of May 2024, the City is processing an SB35 project for a 100% affordable housing project at 678 Ralston Avenue.

SENATE BILL 330 PROCESS

Senate Bill (SB) 330, Housing Crisis Act of 2019, prohibits cities and counties from enacting a development policy, standard, or condition that would impose or enforce design standards that are not objective on or after January 1, 2020 [Government Code Section 663300 (b)(C)]. SB 330 also established specific requirements and limitations on development application procedures.

Per SB 330, housing developers may submit a "preliminary application" for a residential development project. This allows a developer to provide a specific subset of information on the proposed development before providing the full information required by the local government for a housing development application. Submittal of the preliminary application secures the applicable development standards and fees adopted at that time. The project is considered vested, and all fees and standards are frozen, unless the project changes substantially.

The City of Belmont has developed a preliminary application form consistent with SB 330. In addition, the bill limits the application review process to 30 days for projects less than 150 units,

and 60 days for projects greater than 150 units, with no more than five public hearings, including Planning Commission, design review, and City Council.

SB 330 also prohibits cities and counties from enacting a development policy, standard, or condition that would have the effect of: (A) changing the land use designation or zoning to a less intensive use or reducing the intensity of land use within an existing zoning district below what was allowed on January 1, 2018; (B) imposing or enforcing a moratorium on housing development; (C) imposing or enforcing new design standards established on or after January 1, 2020, that are not objective design standards; or (D) establishing or implementing certain limits on the number of permits issued.

DEVELOPMENT COSTS, FEES, AND EXACTIONS

Belmont collects planning and development fees to cover the cost of processing permits and providing the necessary services and infrastructure related to new development. Permit processing fees are intended to reimburse the City for actual administrative costs. Fees are imposed by the Planning, Building, and Public Works Departments. Table 4-13 summarizes fees charged to developers of recently permitted residential projects in Belmont.

Table 4-13 indicates that total fees for a 3-bedroom, 2,180 square-foot single-family residential unit would be approximately $58,394, approximately 3% of the estimated total development costs. The planning and building fees account for 2% of the total costs for a new single-family house. This is typical given almost all the few remaining, vacant single-family residential lots in Belmont are constrained by steep slopes, limited access, or heavy vegetation and will likely require geologic and engineering review.

The total fees per unit for multi-family residential apartment projects range from approximately $38,881 per unit in a 66-unit project, down to $28,575 per unit in a larger 250-unit project. These fees represent 4% to 6% of the total estimated development costs for these projects. Planning and building fees account for 3% to 4% of the total costs for new multi-family residential development projects, while the development impact, in-lieu, and mitigation fees account for approximately 1% of total development costs.

In 2022, *Community Planning Collaborative* engaged *Century|Urban* to perform research on the development costs of certain residential prototypes in San Mateo and Santa Clara Counties. Table 4-14 compares Belmont's total fees development per unit for both single- and multi-family residential to the average total fees per unit for all jurisdictions in San Mateo County. In both categories, the City of Belmont is nominally above average. Given the number of new construction housing units currently as pending or pipeline projects (508 under construction, 306 with approved entitlements, and 209 in development review), Belmont's total development fees per unit do not appear to be a constraint to housing development.

TABLE 4-13: EXAMPLE RESIDENTIAL PROJECT DEVELOPMENT FEES

	Single-Family	Multi-Family Apartment		
	Dwelling 55 Ralston Ranch	1300 El Camino Real (Firehouse Square 1) 100% Affordable	1325 Old County Road 15% Affordable	815 Old County Road 15% Affordable
Project Assumptions				
Project Size (units)	1	66	250	177
Living Area per Unit (sf)	2,180	1,106	898	868
Building Size (sf)	2,180	72,978	224,468	153,685
Average Construction Cost/Unit	$1,040,000	$453,472	$240,013	$223,292
Average Land Cost/Unit	$960,583	$123,000	$123,000	$123,000
Average Soft Costs (non-fees)	$270,000	$120,000	$120,000	$120,000
Project Valuation	$300,000	$29,929,181	$60,003,296	$39,522,730
Project Fees Charged				
Total Development Review/Planning Fees (Including CEQA)	$10,104	$120,413	$61,207	$58,382
Total Building Permits & Fees	$33,771	$1,879,892	$5,156,200	$3,512,757
Total Planning & Building Fees	**$43,875**	**$2,000,305**	**$5,217,407**	**$3,571,139**
Planning & Building Fees per Unit	$43,875	$30,308	$20,870	$20,176
Planning & Building Fees as Proportion of Development Cost	2%	4%	3%	3%
Total Impact Fees	**$14,519**	**$565,871**	**$1,926,336**	**$2,770,118**
Impact Fees per Unit	$14,519	$8,574	$7,705	$15,650
Impact Fees as Proportion of Development Cost	1%	1%	1%	2%
Total Fees	**$58,394**	**$2,566,176**	**$7,143,743**	**$6,341,257**
Total Fees per Unit	$58,394	$38,881	$28,575	$35,826
Total Fees as Proportion of Total Development Cost	3%	6%	4%	5%
Total Development Costs	**$2,328,977**	**$46,324,176**	**$167,893,743**	**$120,152,257**

Source: City of Belmont, December 2022

TABLE 4-14: TOTAL DEVELOPMENT FEES PER UNIT

	Single-Family	Percentage of Total Development Costs	Large Multi-Family	Percentage of Total Development Costs
City of Belmont (see Table 4-13 for details)	$58,394	3%	$28,575	4%
San Mateo Countywide (Average)	$55,433	2%	$25,319	3%

Source: City of Belmont, December 2022; Century Urban "San Mateo and Santa Clara Counties Development Costs," April 2022; Community Planning Collaborative, April 2022.

The City offers programs to mitigate the impact of development fees on affordable housing. In 1990, the City passed a resolution that allows the Planning Director to waive fees for non-profit developers who provide affordable housing units. Recently approved projects providing affordable housing units have also successfully negotiated deferred submittal of certain development fees to help with project financing. In 2020 and 2021, the Belmont City Council held study sessions to review development impact and in-lieu fees and confirmed that Belmont had fees in place that were consistent with and not higher than the median of surrounding jurisdictions. Therefore, development impact, in-lieu, and mitigation fees are not considered to be a constraint to housing development in San Mateo County.

The City follows new transparency requirements for posting all zoning and development standards and fees for each parcel on the jurisdiction's website, pursuant to Government Code section 65940.1(a)(1). The City also maintains a wide variety of development information online, including development standards and all fees. A current schedule of fees and inclusionary affordability requirements can be accessed on the City's website at www.belmont.gov/finance. Table 4-15 summarizes housing development fees in effect for Fiscal Year 2023.

OTHER LOCAL CONSTRAINTS

INFRASTRUCTURE CONSTRAINTS

The City's water service is provided by the Mid-Peninsula Water District which supplies water to consumers in an area slightly larger than the city limits of the City of Belmont. Small portions of the service area are within the City Limits of the City of San Carlos, Redwood City, and parts of the unincorporated County of San Mateo. The District's service territory covers approximately five square miles and serves approximately 28,000 people. In the event of an emergency the district can serve or be served with inter-ties between neighboring utilities, as of today the district has one inter-tie with Foster City, three with San Carlos, one with Redwood City, and three with San Mateo. The City coordinates closely with the Mid-Peninsula Water District to ensure they are aware of projected development and the resultant service growth demand.

The City's wastewater treatment is primarily provided by Silicon Valley Clean Water (SVCW). SVCW serves more than 220,000 people and businesses in their service area. By effectively treating wastewater at an advanced, two-stage biological treatment facility, SVCW helps keep the public and San Francisco Bay environmentally clean and safe. Sewage arrives at the treatment facility through a series of pipelines and pump stations. The sewage then passes through physical, chemical, and biological treatment processes, which results in high quality effluent being discharged to the deep-water channel of the San Francisco Bay.

TABLE 4-15: BELMONT NEW RESIDENTIAL DEVELOPMENT FEES FY 2022-2023

	Single-Family	Multi-Family
Development Review/Planning Fees		
SB 330 Preliminary Review	$311/hr	$311/hr
Planning Review	$6,252	$10,950 deposit + $311/hr
Engineering Review	$5,900	$4,948 deposit + $380/hr
Geologic Review	$6,921	$6,921
Environmental Review – CEQA		
Categorical Exemption Fee	$311	$311
Initial Study/Neg. Dec. (staff time)	N/A	$18,158
Mitigated Negative Declaration	N/A	$21,426 (plus contract cost)
Public Notice Fee	$328	$328
EIR (Plus Consultant)	N/A	$40,221 (plus contract cost)
Other Development Review Fees (As Applicable)		
Tentative Parcel Map	N/A	$27,617
General Plan/Zoning Amendment	N/A	$16,153
Lot Line Adjustment/Consolidation	N/A	$6,043
Variance and FAR Exception	$10,950	$10,950
Conditional Use Permit	N/A	$2,951–$10,329
Parcel Map	N/A	$11,443 +$311/hr
Final Map	N/A	$17,879+$311/hr
Building Permits and Fees		
Building Fee basis	$11,929+ $4.63/1000 sf	$11,929+ $4.63/1000 sf
Building Plan Check	65% of building fee basis	65% of building fee basis
Engineering Plan Check	$5,697 +$358/hr	$5,697 +$358/hr
Noise Insulation	N/A	8% of building fee basis
Planning Plan Check	35% of building fee basis	35% of building fee basis
Accessibility Plan Check	25% of building fee basis	25% of building fee basis
Fire Plan Check	$155	$938-$1,566
Electrical Permit	$159	$159
Mechanical Permit	$162	$162
Plumbing Permit	$161	$161
Inspection Fees	$311/hr	$311/hr
Grading Permit	$1,073 +$3/CY(over 50 CY)	$1,073 +$3/CY(over 50 CY)
Other Fees		
General Plan Maintenance Fee	0.75% of building valuation	0.75% of building valuation
Electronic Document Fee	5% of building fee basis	5% of building fee basis
NPDES Inspection Fee	$1,073	$1,073-$10,728

	Single-Family	Multi-Family
SBSA (Sewer) Connection Fee	$12,025	$12,025/unit
State Energy (Title 24)	25% of building fee basis	25% of building fee basis
Impact Fees		
Park Development Impact Fee	$14,242	$9,495 per unit
Parkland In-Lieu Fee (Quimby)	$41,043	$27,362 per unit
Transportation Impact Fee	$7,697	$5,974 per unit
Public Art In-Lieu Fee	1% building valuation	1% building valuation
Housing Mitigation Fee	$25/sf	$26/sf
School Fees	$6.14/sf	$6.14/sf

Source: City of Belmont FY 2022-2023 Fee Schedule.

It is anticipated that the City has adequate capacity to meet demand and adequate capacity to expand to meet projected development as part of the Housing Element. Current facilities and/or infrastructure are reported to be in good operating condition. Larger housing development projects may require the installation of utility infrastructure to accommodate individual project impacts, including water main lines, upsized sewer lines, and/or additional lateral connections within the city. Infrastructure installations necessary to serve future development would generally be installed within the already disturbed rights-of-way of existing roads or within the disturbance footprints of development projects. Implementation of proposed capital improvement projects for the SVCW treatment plant would ensure adequate capacity to serve projected demand.

A copy of the updated Housing Element and growth projections is provided to utility providers to ensure long term service planning and capital improvements will provide sufficient capacity to accommodate the City's regional housing need for the planning period.

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RESOURCES

This section analyzes resources available for the development, rehabilitation, and preservation of housing in Belmont, including organizations and agencies, financial sources, regulatory assets, and resources for energy conservation. The inventory of land resources suitable for housing can be found in *Section 6, Adequate Sites*.

5.1 Administrative Resources

The following agencies and organizations contribute to the goal of preserving and increasing affordable housing in Belmont. Both government agencies and partnerships with nonprofit agencies and for-profit developers are necessary to implement many housing programs.

City of Belmont

The City of Belmont provides administrative services, housing, and community development services to residents, developers, and others interested in housing issues. In addition, the City is responsible for oversight of the housing assets of the former Redevelopment Agency.

Housing Authority of the County of San Mateo (HACSM)

The City does not operate its own housing authority but is served by the Housing Authority of the County of San Mateo (HACSM), which provides rental subsidies and manages and develops affordable housing for low-income families, seniors, and persons with disabilities in the County. It administers approximately 4,500 vouchers through the Housing Choice Voucher Program (Section 8) and offers rental assistance for 180 units through the Project Based Voucher Program.

SAN MATEO COUNTY

San Mateo County contracts with Project Sentinel to handle complaints of discrimination in the sale or rental of housing and for the mediation of tenant/landlord disputes. San Mateo County also has several local enforcement organizations including the Legal Aid Society of San Mateo County and Community Legal Services of East Palo Alto. These organizations receive funding from the County and participating jurisdictions to support fair housing enforcement and outreach and education in the County. The fair housing services include investigations and enforcement in response to reports of housing discrimination complaints, as well as independent testing of rental properties for signs of discrimination in rental practices. As part of this Housing Element update, the City will improve access to fair housing information on its website, including comprehensive housing related information and materials for low-income households seeking housing opportunities, and coordinate with providers to market programs electronically (see Program H5.1). In addition, the City of Belmont will perform fair housing training in partnership with Project Sentinel for landlords and tenants across the region to promote housing mobility (see Program H5.5).

LOCAL NON-PROFIT RESOURCES

A number of non-profit organizations and support agencies currently work across San Mateo County and have been active in Belmont. These agencies serve as resources in meeting the housing needs of the County and are integral in implementing activities for preservation of assisted housing and development of affordable housing, as well as creating safe and healthy places for all economic segments of the community. These organizations include but are not limited to the list below.

- HIP Housing
- HEART of San Mateo County
- Peninsula Habitat for Humanity
- First Community Housing
- MidPen Housing
- Rebuilding Together Peninsula

5.2 FINANCIAL RESOURCES

The City's housing programs are funded through a variety of state and federal sources. These funds actively support fair housing choice, improving the housing stock, and protecting housing affordability in Belmont and throughout the region. This section offers a summary of funding sources that are currently available in Belmont, as well as additional funding sources that are potentially available to support various housing programs.

CITY FUNDS

HOUSING SUCCESSOR AGENCY

The primary local source of funds for affordable housing in Belmont has traditionally been the former Redevelopment Agency's Low- and Moderate-Income Housing Fund. However, due to passage of Assembly Bill (AB)x1 26, redevelopment agencies across California were eliminated as of February 1, 2012, removing the primary local tool for creating affordable housing. With the subsequent passage of AB 1484 in June 2012, the Supplemental Educational Revenue Augmentation Funds (SERAF) borrowed by the State from Redevelopment Agencies' Low- and Moderate-Income Housing Funds were required to be repaid and deposited into each Housing Successor Agency's Housing Asset Fund. As part of the fiscal year 2023 budget, the Belmont Housing Successor Agency committed $3.5 million to support the 803 Belmont Avenue 100% affordable housing project.

The City expects to receive approximately $4,000,000 in its Low- and Moderate-Income Housing Asset Fund in fiscal year 2024, primarily from the repayment of a loan for the Firehouse Square project. The Housing Successor Agency intends to contribute all revenues towards the development of 100% affordable housing projects, including $1 million that has been committed for the development of the affordable project at Hill Street and El Camino by LINC Housing.

RESIDENTIAL HOUSING MITIGATION FEES

In 2017, the City adopted an ordinance establishing housing mitigation fees on the construction of new residential projects to mitigate the burdens created by these new projects on the need for extremely low-, very low-, low- and moderate-income housing and to increase and preserve the supply of housing affordable to households of extremely low, very low, low and moderate incomes.

COMMERCIAL DEVELOPMENT LINKAGE FEES

In 2017, the City adopted an ordinance establishing a commercial linkage fee. The fee is collected when a building permit for a non-residential use is issued and is to be used for the creation and preservation of affordable housing. It is calculated by using the gross floor area of net new commercial space, excluding structured parking. Fee rates are adjusted annually using the construction cost index, but the City maintains three tiers of pricing for the fee, with "retail/service" at the least expensive, "hotel" at middle pricing, and "office/research" at the highest rates. The City has not received any commercial linkage fee to date but several large-scale commercial projects are in the development pipeline that if constructed, will be required to pay these fees.

INCLUSIONARY HOUSING IN-LIEU FEES

The City Council Ordinance 2017-1126, adopted in 2017, established an inclusionary zoning fee for small for-sale residential projects of fewer than 25 units in-lieu of providing an alternative, as defined in the Ordinance. If in-lieu fees are levied, they are the same as the residential development mitigation fee. As of fiscal year 2023, City currently has roughly $600,000 in in-lieu housing fees in the fund that are anticipated to be used to support affordable housing development and Housing Element program implementation.

COUNTY FUNDS

COMMUNITY DEVELOPMENT BLOCK GRANTS (CDBG)

San Mateo County is an Entitlement jurisdiction under the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant (CDBG) Program. As such, the County receives funding from HUD on an annual basis and can provide grants to non-profit and governmental agencies to develop viable urban communities through the provision of services to the low- and moderate-income community. Programs and services include development of housing for persons with special needs; services to the elderly, those with disabilities, and children; expanding economic opportunities; and public improvements.

HOME INVESTMENT PARTNERSHIP PROGRAM

The HOME program is a federal grant that is also determined by formula allocations. HOME funds are directed toward the housing programs that assist persons at or below 60% of the median income, including acquisition, rehabilitation, new construction, tenant-based assistance, homebuyer assistance, planning, and supportive services. Funding for this program is allocated to San Mateo County for projects in all non-entitlement areas, including Belmont.

EMERGENCY SOLUTIONS GRANTS (ESG)

Emergency Solutions Grant (ESG) funds are used to provide shelter and related services to the homeless. The San Mateo County Department of Conservation and Development (DCD) coordinates the allocation of ESG funds with the County's Homeless Program Office and the Continuum of Care (CoC) Board.

OTHER FUNDING SOURCES

Table 5-1 identifies additional funding federal and state resources for affordable housing activities, including but not limited to new construction, acquisition, rehabilitation, and homebuyer assistance.

TABLE 5-1: OTHER PUBLIC FUNDING SOURCES

Federal Programs	
Brownfields Grant Funding Program	Resources available for the cleanup of eligible publicly- or privately held properties to facilitate the reuse/redevelopment of contaminated sites.
Choice Neighborhoods Implementation Grant Program	Support the implementation of comprehensive plans expected to revitalize public and/or assisted housing and facilitate neighborhood improvements.
Community Facilities Direct Loan & Grant Program	Provides affordable funding to develop essential community facilities in rural areas.
Continuum of Care (CoC) Program	Funding is available on an annual basis through HUD to quickly rehouse homeless individuals and families.
Farm Labor Housing Direct Loans & Grants (Section 514)	Provides affordable financing to develop housing for domestic farm laborers.
Housing Choice Vouchers	The government's major program for assisting very low-income families, the elderly, and the disabled to afford housing through rental subsidies that pays the difference between the current fair market rent and what a tenant can afford to pay (e.g., 30% of their income).
Home Ownership for People Everywhere (HOPE)	Provides grants to low-income people to achieve homeownership.
Housing Opportunities for Persons with AIDS (HOPWA)	Funds are made available countywide for supportive social services, affordable housing development, and rental assistance to persons living with HIV/AIDS.
Housing Preservation Grants	Grants to sponsoring organizations for the repair or rehabilitation of housing owned or occupied by low- and very-low-income rural citizens.
Low-Income Housing Tax Credit (LIHTC) Program	Tax credits for the for the acquisition, rehabilitation, or new construction of rental housing for lower-income households. Project equity is raised through the sale of tax benefits to investors. 4% and 9% credits available.
Rural Rental Housing: Direct Loans	Direct loans for construction or rehabilitation of affordable, rural multi-family rental housing.
Section 108 Loan Guarantee Program	Loans to CDBG entitlement jurisdictions for capital improvement projects that benefit low- and moderate-income persons.
HUD Section 202 Supportive Housing for the Elderly Program	Interest-free capital advance to private, non-profit sponsors to cover the costs of construction, rehabilitation, or acquisition of very low-income senior housing.
HUD Section 221(d)(3) and 221(d)(4)	Insures loans for construction or substantial rehabilitation of multi-family rental, cooperative, and single-room occupancy housing.
Section 502 Direct Loan Program	USDA Section 502 Direct Loan Program provides homeownership opportunities for low- and very-low-income families living in rural areas.

State Programs	
Affordable Housing and Sustainable Communities Program (AHSC)	Funds land use, housing, transportation, and land preservation projects that support infill and compact development and GHG emissions.
CalHome	Grants to local public agencies and non-profits to assist first-time homebuyers become or remain homeowners through deferred-payment loans. Funds can also be used for ADU/JADU assistance (i.e., construction, repair, reconstruction, or rehabilitation).
CalHFA Residential Development Loan Program	Loans to cities for affordable, infill, owner-occupied housing developments.
Cleanup Loans and Environmental Assistance to Neighborhoods (CLEAN) Program	Department of Toxic Substances Control program that provides low-interest loans to investigate, cleanup, and redevelop abandoned and underutilized urban properties.
California Emergency Solutions and Housing (CESH)	Grants for activities to assist persons experiencing or at-risk of homelessness.
California Self-Help Housing Program	Grants for sponsor organizations that provide technical assistance for low- and moderate-income families to build their homes with their own labor.
Community Development Block Grant-Corona Virus (CDBG-CV1) – CARES Act Funding	A subsidiary of the CDBG program that provides relief to eligible entities due to hardship caused by COVID-19.
Emergency Housing Assistance Program (EHAP)	Funds for emergency shelter, transitional housing, and related services for the homeless and those at risk of losing their housing.
Golden State Acquisition Fund (GSAF)	Short-term loans (up to five-years) to developers for affordable housing acquisition or preservation.
Homekey	Grants to acquire and rehabilitate a variety of housing types (e.g., hotels, motels, vacant apartment buildings) to serve people experiencing homelessness or who are also at risk of serious illness from COVID-19.
Homeless Emergency Aid Program (HEAP)	$500 million block grant program designed to provide direct assistance to cities, counties and CoCs to address the homelessness crisis.
Homeless, Housing Assistance and Prevention (HHAP) Program	HHAP Round 1: $650 million grant to local jurisdictions to support regional coordination and expand or develop local capacity to address immediate homelessness challenges. Round 2: $300 million grant that provides support to continue to build on regional collaboration to develop a unified regional response to homelessness.
Housing for a Healthy California (HHC)	Funding for supportive housing opportunities intended to create supportive housing for individuals who are recipients of or eligible for health provided through Medi-Cal.

Housing Navigators Program	$5 million in funding to counties for the support of housing navigators to help young adults aged 18 to 21 secure and maintain housing, with priority given to young adults in the foster care system.
Housing-Related Parks Program	Funds the creation of new park and recreation facilities or improvement of existing park and recreation facilities that are associated with rental and ownership projects that are affordable to very low- and low-income households.
Infill Infrastructure Grant Program (IIG)	Grant funding for infrastructure improvements for new infill housing in residential and/or mixed-use projects.
Joe Serna, Jr., Farmworker Housing Grant (FWHG)	Grants and loans for development or rehabilitation of rental and owner-occupied housing for agricultural workers with priority for lower-income households.
Local Early Action Planning (LEAP) Grants	Assists cities and counties to plan for housing through providing one-time, non-competitive planning grants.
Local Housing Trust Fund Program (LHTF)	Lending for construction of rental housing projects with units restricted for at least 55 years to households earning less than 60%AMI. State funds match local housing trust funds as down-payment assistance to first-time homebuyers.
Mobile-home Park Rehabilitation and Resident Ownership Program (MPRROP)	Low-interest loans for the preservation of affordable mobile-home parks.
Mortgage Credit Certificate (MCC) Program	Income tax credits to first-time homebuyers to buy new or existing homes.
Multi-family Housing Program (MHP)	Low-interest, long-term deferred-payment permanent loans for new construction, rehabilitation, and preservation of permanent and transitional rental housing for lower-income households.
No Place Like Home	Invests in the development of permanent supportive housing for persons who need mental health services and are experiencing homelessness or chronic homelessness, or at risk of chronic homelessness.
Office of Migrant Services (OMS)	Provides grants to local government agencies that contract with HCD to operate OMS centers throughout the state for the construction, rehabilitation, maintenance, and operation of seasonal rental housing for migrant farmworkers.
Permanent Local Housing Allocation Program (PLHA)	Grants (competitive for non-entitlement jurisdictions) available to cities to assist in increasing the supply of affordable rental and ownership housing, facilitate housing affordability, and ensure geographic equity in the distribution of funds.
Predevelopment Loan Program (PDLP)	Short-term loans to cities and non-profit developers for the continued preservation, construction, rehabilitation, or conversion of assisted housing primarily for low-income households.
Regional Early Action Planning (REAP) Grants	Grant funding is intended to help COGs and other regional entities collaborate on projects that have a broader regional impact on housing.

SB 2 Planning Grants Program	One-time funding and technical assistance to help local governments adopt and implement plans and process improvements that streamline housing approvals and accelerate housing production.
Supportive Housing Multi-Family Housing Program (SHMHP)	Low-interest loans to developers of permanent affordable rental housing that contain supportive housing units.
Transformative Climate Communities (TCC) Program	Competitive grants for planning and implementation of community-led development and infrastructure projects that achieve major environmental, health, and economic benefits in the state's most disadvantaged communities.
Transit Oriented Development Housing Program (TOD)	Low-interest loans and grants for rental housing that includes affordable units near transit.
Transitional Housing Program (THP)	Funding to counties for child welfare services agencies to help young adults aged 18 to 25 find and maintain housing, with priority given to those previously in the foster care or probation systems.
Veterans Housing and Homelessness Prevention Program (VHHP)	Long-term loans for development or preservation of rental housing for very low- and low-income veterans and their families.
Workforce Housing Program	Government bonds issued to cities to acquire and convert market-rate apartments to housing affordable to moderate-income households, generally households earning 80% to 120% of AMI.

Source: City of Belmont, 2024.

5.3 ENERGY CONSERVATION OPPORTUNITIES

The State of California is a nationwide leader in sustainable building practices. Written into the State Building Code are several sets of requirements and guidelines to facilitate the production of more environmentally friendly buildings. These requirements are updated every three years. The most recent version, the 2019 California Building Standards Code took effect on January 1, 2020. Title 24, Part 6, of the California Code of Regulations (Building Energy Efficiency Standards for Residential and Nonresidential Buildings) contains building standards that provide for energy efficiency and focus on four key areas: smart residential photovoltaic systems, updated thermal envelope standards, residential and nonresidential ventilation requirements, and nonresidential lighting requirements.

The City of Belmont requires compliance with the 2019 California Building Code for all new construction. The City amends the Code as needed to further define requirements based on the unique local conditions of Belmont and to assist the City in meeting our sustainability goals. The Code is designed to protect the public health, safety, and welfare of Belmont's residents. Compliance with the California Building Code on the use of energy efficient appliances and insulation has reduced energy demand stemming from new residential development.

LOCAL AND REGIONAL PROGRAMS

The Bay Area Regional Energy Network (BAYREN) is a coalition of the Bay Area's nine counties working to promote resource efficiency at the regional level, focusing on energy, water, and greenhouse gas reduction. BAYREN provides rebates and financing for a variety of energy upgrades and works in partnership with PG&E (the local utility provider) and Peninsula Clean Energy (the local Community Choice Aggregation program) to offer financial and energy-related assistance programs for its low-income customers, including:

- **Relief for Energy Assistance through Community Help (REACH).** The REACH program helps low-income qualified customers who experience uncontrollable or unforeseen financial hardships.
- **Low Income Home Energy Assistance Program (LIHEAP).** This federally funded program provides financial assistance to help offset eligible household's energy costs, including heating, cooling, and home weatherization expenses.
- **CARE/FERA Discount Programs**. CARE and FEA help eligible customers pay their energy bills. A monthly discount is applied on electricity and/or gas for eligible households.
- **Medical Baseline Allowance.** Customers who are eligible for Medical Baseline receive an additional allotment of electricity and/or gas per month. This helps to ensure that more energy to support qualifying medical devices is available at a lower rate.
- **Vulnerable Customer Program.** The Vulnerable Customer Program was designed to help address the needs of our customers whose life or health would be at risk should their electric or gas service be disconnected. Customers who self-certify that they have a serious illness or condition that could become life threatening if their electric or gas service is disconnected for nonpayment will receive an in-person visit from a PG&E representative before disconnection.
- **Home Upgrade Program.** This program provides income-qualified homeowners with home repairs and energy efficiency upgrades at no cost.

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ADEQUATE SITES



Firehouse Square 1 located at 1300 El Camino Real

State Housing Element Law (Government Code Sections 65583(a)(3)) requires that jurisdictions demonstrate their availability of adequate land resources to accommodate their "fair share" of regional housing needs. Jurisdictions must demonstrate that these land resources have the appropriate site characteristics and development regulations required to accommodate their community's housing needs as identified by the State Department of Housing and Community Development (HCD) and the Bay Area's regional governing body, the Association of Bay Area Governments (ABAG). Land resources identified as suitable for potential future accommodation of residential development throughout the planning period are referred to as a "Sites Inventory." This section describes the land resources which have been identified for inclusion in the City's Sites Inventory.

The chapter starts with a description of the City's housing target for the 2023-2031 planning period called the Regional Housing Needs Allocation (RHNA). It then describes pipeline and pending projects and presents the methodology for developing the sites inventory, including an analysis of recent development trends that provided guidance for selecting housing opportunity sites, anticipated Accessory Dwelling Units (ADUs), and vacant and non-vacant sites where housing is an allowed use. It then provides an analysis of each of the identified suitable sites and the factors that make them likely to develop during this planning period. The analysis in this chapter demonstrates that there is an adequate supply of suitable land to accommodate the City's RHNA housing allocation of 1,785 units, including housing for very low- and low-income households.

6.1 REGIONAL HOUSING NEEDS ALLOCATION (RHNA)

RHNA is the State-required process that seeks to ensure each California jurisdiction is planning for enough housing capacity to accommodate their "fair share" of the state's housing needs for all economic segments of the community. The RHNA process for the nine-county Bay Area is described below.

- **Regional Determination**. The HCD provided the Association of Bay Area Governments (ABAG) with a Regional Housing Needs Determination of **441,176 units**. This is the number of units the Bay Area must plan for between 2023 and 2031. It represents the number of additional units needed to accommodate the anticipated growth in the number of households, to replace expected demolitions and conversions of housing units to non-housing uses, and to achieve a future vacancy rate that allows for healthy functioning of the housing market. The Regional Housing Needs Determination for the first time ever also included adjustments related to the rate of overcrowding and the share of cost-burdened households, which resulted in a significantly higher number of housing units for which the Bay Area must plan compared to previous RHNA cycles.
- **RHNA Methodology**. ABAG developed a RHNA methodology to allocate the Regional Housing Needs Determination across all cities, towns, and counties in the region. The RHNA methodology must be consistent with State objectives, including but not limited to promoting infill, equity, and environmental protection; ensuring jobs-housing balance; and affirmatively furthering fair housing. The allocation also considers factors such as employment opportunities, the availability of suitable sites and public facilities, commuting patterns, and type and tenure of housing need. ABAG developed the RHNA methodology in conjunction with a committee of elected officials, jurisdictional staff, and related stakeholders called the Housing Methodology Committee. More information about ABAG's RHNA methodology is available at https://abag.ca.gov/our-work/housing/rhna-regional-housing-needs-allocation.
- **Housing Element Updates**. Each jurisdiction must adopt a Housing Element that demonstrates how it can accommodate its assigned RHNA for each income category through its zoning. HCD reviews each jurisdiction's Housing Element for compliance with State law. Belmont's Housing Element must demonstrate capacity to accommodate **1,785 units** as further described below.

BELMONT'S "FAIR SHARE"

In determining a jurisdiction's share of new housing needs, ABAG splits each jurisdiction's allocation into four income categories:

- Very Low-Income – 0% to 50% of Area Median Income (AMI)
- Low-Income – 51% to 80% of AMI
- Moderate-Income – 81% to 120% of AMI
- Above Moderate-Income – more than 120% of AMI

The AMI in San Mateo County for a family of four is $175,000. How this breaks down into income categories for Belmont is shown in Table 6-1. Where this Housing Element refers to housing that is affordable to the different income levels shown above, this means that a household spends **no more than 30% of their income on housing**.

TABLE 6-1: RHNA AFFORDABILITY LEVELS IN BELMONT

Affordability Level	Percent of AMI	Belmont Household Income[a]
Very Low-Income	≤ 50%	< $87,500
Low-Income	51-80%	$87,501 - $140,000
Moderate-Income	81-120%	$140,001 – $210,000
Above Moderate-Income	> 120%	> $210,000

Note: AMI = Area Median Income, Household incomes based on San Mateo County's 2023 AMI of $175,000 for a 4-person household.
[a] Household incomes are for households/families of four.
Source: CA HCD, Division of Policy Development, State Income Limits 2023.

In December 2021, ABAG identified the City of Belmont's fair share of the region's housing needs as 1,785 new housing units, as shown in Table 6-2. This allocation represents a planning goal by requiring the City to demonstrate sufficient development capacity through the identification of potential sites and zoning to facilitate the RHNA during the planning period.

TABLE 6-2: BELMONT RHNA

Income Category	RHNA	Percent of RHNA
Very Low-Income (0-50% of AMI)	488	27%
Low-Income (50-80% of AMI)	281	16%
Moderate-Income (80-120% of AMI)	283	16%
Above Moderate-Income (120% or more of AMI)	733	41%
Total	**1,785**	**100%**

Source: Housing Element Cycle 6 RHNA Allocation.

In addition, each jurisdiction must also address the projected need of extremely low-income households, defined as households earning 30% or less of AMI. The projected extremely low-income need is assumed to be 50% of the total RHNA need for the very low-income category. As such, there is a projected need for 244 extremely low-income housing units.

6.2 PROGRESS TOWARDS THE RHNA

Per HCD guidance, housing units that are proposed, approved, or under construction are counted towards the current RHNA so long as a Certificate of Occupancy is not issued before the projection period start date, which is June 30, 2022. Projects that receive a Certificate of Occupancy before June 30, 2022, count towards the previous RHNA cycle. Belmont's pipeline projects are described below. The City is also processing three pending projects, which have been submitted but not yet approved. The City is committed to a timely public review process to facilitate all pipeline and pending projects and will follow all applicable State Laws (see Program H1.5: Facilitate Pipeline and Pending Projects).

Additionally, per HCD guidance, a community may also credit the number of ADUs that are anticipated to be developed during the 6th Cycle Housing Element planning period toward its RHNA requirements. The forecasted development of ADUs during the planning period must be based on an analysis of prior years' building permit data and local development regulations that promote ADU development. The City of Belmont's anticipated ADU development over the course of the 2023-2031 planning period is discussed in more detail below.

PIPELINE PROJECTS

As noted above, projects that have been approved, permitted (since June 30, 2022), or received a certificate of occupancy (in 2023) since the beginning of the RHNA projected period may be credited toward meeting the RHNA allocation based on the affordability and unit count of the development. For these projects, affordability is based on the actual or projected sale prices, rent levels, or other mechanisms establishing affordability in the planning period of the units within the project. Table 6-3 summarizes all pipeline and pending housing development projects, the affordability level of the units, and the affordability mechanism, if applicable. These projects are either under construction or have received entitlement approval.

As indicated in Table 6-3, four pipeline multi-family housing projects have completed construction and will be occupied by Spring 2024. These projects include:

- Firehouse Square 1
- Firehouse Square 2
- 815 Old County Road
- 1325 Old County Road

The following is a more detailed summary of the status of the remaining pipeline projects. The City anticipates that all of these projects will be constructed and occupied during the RHNA 6 planning period and will establish Program H1.5: Facilitate Pipeline and Pending Projects to support these projects through completion (see *Chapter 7, Housing Goals, Policies, and Programs*).

- **803 Belmont Avenue** – This project is a 100% affordable project. Entitlements were approved in May 2022. In addition, the City committed $3.5 million in Affordable Housing Funds to support the project. The project was awarded $14 million of San Mateo County Affordable Housing Funds in September 2022 and CTAC/CDLAC funding in May 2023. Construction commenced in May 2024.
- **608 Harbor Blvd**. – Entitlement approvals were granted in June 2023 and the City and San Mateo County completed the LAFCo annexation process in early 2024. Construction is anticipated to begin in 2025.
- **Hill Street at El Camino Real** – This project is a 100% affordable project. Entitlement approvals and a Disposition Development and Loan Agreement (DDLA) with Linc Housing for project development were approved in February 2023. The project is in the process of applying for low-income housing tax credit financing and, if awarded, will start construction in late 2025 or 2026.

TABLE 6-3: PIPELINE AND PENDING PROJECTS AFFORDABILITY OVERVIEW

	Very Low-Income	Low-Income	Moderate-Income	Above Moderate-Income	Total Units	Affordability Mechanism	Status
Pipeline Projects							
Firehouse Square 1	46	19	0	1	66	City/County AHF; TCAC	Completed 2023
Firehouse Square 2	0	0	0	15	15	n/a	Completed 2024
815 Old County Road	0	27	0	150	177	Inclusionary	Completed 2024
1325 Old County Road	0	38	0	212	250	Inclusionary	Completed 2024
803 Belmont Avenue	63	61	0	1	125	City/Council AHF; TCAC	Construction
608 Harbor Boulevard	0	16	0	87	103	Inclusionary	Approved
Hill Street at El Camino Real	22	14	0	1	37	City/County AHF; TCAC	Approved
800 Laurel Avenue	0	0	0	16	16	n/a	Approved
Single-Family Homes	0	0	0	4	4	n/a	Approved
ADUs	0	0	21	0	21	n/a	Approved
PIPELINE SUBTOTAL	**131**	**175**	**21**	**487**	**814**		
Pending Projects							
580 Masonic Way	11	0	11	117	139	Inclusionary	Applied
1477 El Camino Real	0	1	0	4	5	n/a	Applied
678 Ralston Avenue	52	12	0	1	65	County; TCAC	Applied
PENDING SUBTOTAL	**63**	**13**	**11**	**122**	**209**		
TOTAL	**194**	**188**	**32**	**609**	**1,023**		

Note: TCAC = Tax Credit Allocation Committee; AHF = Affordable Housing Funds
Source: City of Belmont, 2024.

- **800 Laurel Avenue** – Entitlement approvals for 16 market rate units were approved in December 2021. The applicant applied for building permits but encountered technical issues related to the undergrounding of utilities. They have been working with PG&E and the City to resolve those issues. As of April 2024, the issues are resolved and they are proceeding with the building permit review process. Construction is anticipated to begin in 2025.
- **Single-Family Residential Units and ADUs** – A total of four single-family homes and 21 ADUs were permitted in 2023. These projects are on various timelines but the City anticipates construction of these units to commence in 2024.

PENDING PROJECTS

The residential projects that have yet to be approved but will likely be developed during the 2023-2031 planning period are referred to as "Pending Projects" and are described below and included in Table 6-3. These pending projects total 209 residential units:

- **580 Masonic Way** – Project application was submitted in May 2021 for 139 units, including 11 very low-income units and 11 moderate income units. The project was on hold while the developer worked through legal challenges related to private site covenants but as of April 2024 they are moving forward again with an updated entitlement application. The project is an allowable use and the City anticipates the project will complete its entitlement process in early 2025 and will be constructed during the planning period. The project site was included in the 2015-2023 Housing Element and was required to be rezoned to accommodate the RHNA allocation for the site. As a result, the site is eligible for by-right approvals if the proposed project includes 20% low-income units. The current application for the site includes 15% very low-income units and 15% moderate income units.
- **1477 El Camino Real** – Project application for a five-unit market rate residential project was submitted in July 2020. This is physically constrained site that relies on a joint use access easement with Caltrain for parking. The applicant has been working though these issues and modified the project in 2023. The City expects the project will be entitled and constructed during the planning period.
- **678 Ralston Ave** – Project application was originally submitted in December 2023 for a 65-unit 100% affordable project pursuant to SB 35. The applicant withdrew the application, made revisions, and resubmitted the project in early 2024. The City expects the project to be approved ministerially in 2024. The project has secured funding from San Mateo County and will apply for tax credit financing. Construction timing will depend on the award of tax credit financing but is expected to occur in the middle of the planning period.

ACCESSORY DWELLING UNITS

The State allows jurisdictions to count projected development of ADUs based on prior years' production averages. Substantial changes in State law pertaining to ADUs in the last several years have made it much easier for homeowners to create ADUs throughout Belmont. With no formal affordability mechanisms or tracking in place for ADUs, Belmont has historically considered ADUs to be moderate-income units based on unit size limitations.

Table 6-4 below includes an analysis of the City of Belmont's issuance of building permits for ADUs between the years 2018 to 2023. During that time period, the number of ADUs developed has significantly increased since 2018 with an average of 15 ADUs per year over the last six years. The Belmont Sites Inventory conservatively assumes an average of 13 ADUs per year at the moderate-income level, or 90 total moderate-income units (between 2024-2031).

TABLE 6-4: SIX-YEAR ACCESSORY DWELLING UNIT (ADU) PRODUCTION

Year	2018	2019	2020	2021	2022	2023	6-Year Total
ADUs Permitted	9	12	11	12	27	21	92

Source: City of Belmont, 2024.

RHNA CREDITS SUMMARY

A summary of the pipeline developments and projected ADU development which can serve as "alternative means" or credits toward the City of Belmont's RHNA requirements are included in Table 6-5. Together these credits total 1,113 units (more than 50% of the required RHNA). The following Section 6.3, Sites Inventory Methodology, describes the land availability to accommodate the remaining RHNA.

TABLE 6-5: RHNA CREDITS

Address	Very Low-Income	Low-Income	Moderate-Income	Above Moderate-Income	Total Units
Pipeline Units	131	175	21	487	814
Pending Units	63	13	11	122	209
Projected ADUs (2024-2031)	0	0	90	0	90
TOTAL	**194**	**188**	**122**	**609**	**1,113**

Source: City of Belmont, 2024.

6.3 SITE INVENTORY METHODOLOGY

The City has identified adequate sites to accommodate the remaining RHNA and an ample buffer for all income categories after credits are applied. City staff inventoried vacant and underutilized parcels in Belmont to determine what land is available for development at various density levels. Types of suitable sites include the following.

- Vacant, residentially zoned sites.
- Vacant, non-residentially zoned sites that allow residential development.
- Underutilized residentially zoned sites capable of being developed at a higher density or with greater intensity (Note: "underutilized" refers to land-improvement ratios which evaluates the amount of available land in comparison to the development intensity of the existing improvements constructed on-site).
- Underutilized sites zoned for residential use.
- Underutilized sites zoned for mixed-use use that allow residential development.
- Residentially zoned sites that are capable of being developed at a higher density (non-vacant sites, including underutilized sites).
- Sites owned or leased by the City.
- Non-residentially zoned sites that can be redeveloped for residential use (via program actions).

RECENT DEVELOPMENT TRENDS

After many years of limited development activity in the city, Belmont has seen a significant increase in housing projects since the 2017 adoption of a comprehensive General Plan update

and the Belmont Village Specific Plan (BVSP) for the area near the Caltrain station. As a result of these planning efforts and revised development standards, the City currently has 11 multi-family residential projects comprising 998 units that have either been entitled (pipeline projects) or are submitted entitlement applications (pending projects). These projects include a mix of unit types, tenures, and targeted incomes, including four 100% affordable rental projects, market rate rental multi-family apartments, and for-sale townhomes. The characteristics of these pipeline and pending projects serve as the basis for the analysis of feasibility and capacity for Belmont's housing inventory sites. Table 6-6 provides an analysis of site characteristics for these projects.

PRIOR USES/BUILDING CHARACTERISTICS

The pipeline and pending projects, as shown in Table 6-6, are located on non-vacant properties containing older, low-density, commercial and industrial development. The majority of the sites were non-vacant and had a variety of commercial and light industrial uses such as auto service, low-rise office buildings, light manufacturing, stand-alone retail buildings, and a former ice rink. All of the proposed developments are on sites where the buildings were over 40 years old. In addition, except for the City-owned Fire Station property, the uses existing on-site were fully operational at the time development proposals were submitted to the City, demonstrating that even properties with active commercial or industrial uses can be converted to residential.

IMPROVEMENT TO LAND RATIO

As shown in Table 6-6, the Improvement to Land Ratio (ILR), a measure of the development intensity of the property, is 0.55 and below for all of the sites, with the average value of 0.2. This indicates that the properties were underutilized, many with large amounts of surface parking, and therefore prime for redevelopment.

SITE CONSOLIDATIONS

As seen in Table 6-6, eight of the 11 pipeline projects are located on consolidated sites, comprised of up to nine different parcels. Of the three remaining sites that did not include lot consolidations, two are small site developments located on parcels of under ½-acre and the remaining site is the redevelopment of a retail strip center with active retail uses.

Many of the consolidated properties had previously been under multiple ownerships prior to being assembled for development.

Below are examples of pipeline and pending projects in the RHNA-6 planning period and two examples of successful lot consolidations that were completed during the RHNA-5 planning period with varying densities and affordability levels. These examples demonstrate that the lot consolidation opportunities identified in the RHNA-6 Sites Inventory are achievable.

TABLE 6-6: PIPELINE AND PENDING MULTI-FAMILY PROJECTS SITE CHARACTERISTICS

	Project Characteristics				Predevelopment Site Properties			
Address	Total Units	Size (Acres)	Density (Units/ Acre)	Status	Consolidated Site?	Prior Uses	Building Age	ILR
Pipeline Projects								
Firehouse Square 1 (100% Affordable Rental)	66	0.72	91	Completed 2023	Yes (3 Parcels)	Firehouse & vacant lot	1936	0.171
Firehouse Square 2 (For-Sale Townhomes)	15	0.52	29	Completed 2024	Yes (3 Parcels)	Firehouse & vacant lot	1936	0.053
815 Old County Road (Market Rate Rental)	177	1.74	102	Completed 2024	Yes (2 Parcels)	Ice Rink	c. 1960	0.289
1325 Old County Road (Market Rate Mixed-Use Rental)	250	2.08	120	Completed 2024	Yes (5 Parcels)	Commercial and industrial concrete tilt-up buildings	c. 1937	0.349
803 Belmont Avenue (100% Affordable Rental)	125	1.46	86	Construction	Yes (2 Parcels)	Motel & vacant lot	1953	0.067
608 Harbor Blvd. (Market Rate Rental)	103	0.71	145	Approved	Yes (4 Parcels)	Gas station, car wash, & former railroad track	1970-1982	0.019
Hill St. at El Camino Real (100% Affordable Rental)	37	0.32	116	Approved	Yes (4 Parcels)	Auto repair shop & three retail stores	c. 1960	0.55
800 Laurel Avenue (For-Sale Townhomes)	16	1.79	9	Approved	Yes (9 Parcels)	SFD & vacant land	1938	0.019
PIPELINE MULTI-FAMILY SUBTOTAL	**789**							
Pending Projects								
580 Masonic Way (Market Rate Rental)	139	1.24	112	Applied	No	Retail strip mall	1956	0.323
1477 El Camino Real (Market Rate Mixed-Use Rental)	5	0.15	33	Applied	No	Vacant land	n/a	0
678 Ralston Ave (100% Affordable Rental)	65	0.36	181	Applied	No	Dry cleaners	1961	0.233
PENDING MULTI-FAMILY SUBTOTAL	**209**							
TOTAL	**998**							

Source: City of Belmont, 2024.

RHNA CYCLE 6 PIPELINE AND PENDING PROJECTS WITH SITE CONSOLIDATIONS:

- **803 Belmont Avenue:** Two parcels including a motel and a small vacant lot, each under separate ownership. The combined 1.46-acre site is approved for 124 low-income units and one market-rate unit and started construction in May 2024.
- **815 Old County Road:** Two non-vacant parcels under the same owner previously used as an ice rink. The combined 1.74-acre site developed with 27 low-income units and 150 market-rate units and was completed in 20224.

- **608 Harbor Blvd.:** Four non-vacant parcels with three separate owners currently used as a gas station, former railroad track remnant, and self-service car wash. The combined 0.71-acre site is approved for 16 low-income units and 87 market-rate units.
- **Hill Street at El Camino Real:** Four non-vacant parcels previously used as an auto repair shop and three retail stores. The City purchased the sites from two owners and consolidated them for affordable housing development. The combined 0.32-acre site is approved for 36 low-income units and one market-rate unit.
- **800 Laurel Avenue:** Nine parcels currently consisting of a single-family home and vacant land under a singular owner. The combined 1.79-acre site is approved for 16 market-rate units.
- **Firehouse Square 1 and 2:** Three parcels consisting of a former City-owned firehouse and privately owned vacant lot. The combined 1.25-acre site developed with 65 very low-income units completed in 2023 and 16 market-rate townhome units which were completed in 2024.
- **1325 Old County Road:** Five small non-vacant parcels (including two parcels that needed to be annexed into the City of Belmont to accommodate the project), with five owners, which previously contained a mix of commercial and light industrial buildings, which were predominantly one and two-story tilt-up concrete construction. The combined 2.1-acre site developed into 250 rental housing units, including 37 lower-income affordable units and was completed in 2024.

RHNA CYCLE 5 PROJECTS WITH SITE CONSOLIDATIONS:

- **400 El Camino Real:** Two non-vacant parcels containing a convenience market, a two-story office building, and parking. The combined 1.83-acre site developed into 73 units and approximately 5,000 square feet of commercial space (developer made inclusionary housing in-lieu contribution) and was completed in 2019.
- **576-600 El Camino Real:** Four non-vacant parcels containing a three-unit retail plaza and home goods boutique under a single ownership. The combined 0.91-acre site developed with 32 market-rate units (developer made inclusionary housing in-lieu contribution) and was completed in 2017.

DENSITY

The Belmont Village Specific Plan (BVSP) zone does not include any maximum residential density metric, which has resulted in densities of more than 100 units per acre regularly being attained for multi-family residential projects. The City of Belmont currently has six multi-family residential projects either under construction or in development review that exceed 100 units per acre, as reflected in Table 6-6. In January 2024, the City implemented Housing Element Program H4.1, Update Zoning Code to Increase Floor Area Ratios and Density, to eliminate the maximum residential density metric and increase the allowable Floor Area Ratio (FAR) for all properties in the Corridor Mixed Use (CMU) district to continue to encourage densities greater than 100 dwelling units per acre.

SMALL SITE DEVELOPMENT

Another notable development trend in Belmont is the development of small sites that are less than a ½-acre in size. The City currently has three projects in the pipeline on sites that are between 0.15 to 0.36 acres (as shown in Table 6-6). It is also important to note that of these projects, two are 100% affordable projects which indicates that it is feasible to build affordable housing on small sites.

SITE INVENTORY APPROACH

Staff conducted a site-by-site review of potential development sites citywide. As demonstrated below, staff currently believe that the RHNA, plus a reasonable buffer, can be accommodated on parcels identified in the Sites Inventory using current land use and zoning regulations. Each site, or potential aggregation of sites, was analyzed to discern the likelihood and feasibility of development during the period of 2023-2031. Based on the recent development trends in Belmont, as evidenced by the characteristics of the pipeline and pending projects, factors such as underperforming or vacant uses, owner or developer interest, age of current improvements, Improvement to Land Ratio (ILR), and potential site constraints were reviewed. Given these considerations, the City identified sites that are likely to develop/redevelop within the planning period.

As seen in Table 6-11 at the end of this chapter, the adequate sites analysis demonstrates that there is enough land to meet the City's RHNA. The City's Sites Inventory for future housing includes property zoned for mixed use (including high density residential) that is currently vacant, as well as land that is underutilized. The majority of the properties in the Sites Inventory are non-vacant lands that are underutilized given that the City is primarily built out and has limited vacant land. However, as demonstrated by the pipeline and pending projects, the City is experiencing a high volume of residential projects on underutilized non-vacant sites and expects this trend to continue.

REALISTIC CAPACITY

When establishing realistic unit capacity calculations, the jurisdiction must consider current development trends of existing or approved residential developments at a similar affordability level in that jurisdiction, as well as the cumulative impact of standards such as height, open space, parking, and floor area ratios (FARs). The capacity methodology must be adjusted to account for any limitation because of availability and accessibility of sufficient water, sewer, and dry utilities. For non-residential zoned sites (i.e., mixed-use areas or commercial sites that allow residential development), the capacity methodology must account for the likelihood of residential development on these sites. For a detailed discussion of non-residential development, please see *Chapter 4, Constraints,* Section 4.2 Governmental Regulations and Constraints, Multi-Family Housing subheading.

Belmont currently has 1,023 housing units as pipeline or pending projects (either constructed since 2023, currently under construction, approved with entitlements, or in development

review). These units represent more than 50% of the total RHNA allocation for the next planning period.

The City does not have a maximum density in the zoning districts where the housing opportunity sites are located. Therefore, the City cannot assume housing opportunity sites will develop based on that maximum (such as 75% or 80% of the maximum density in that district.) Instead, the City is basing its assumption on past projects. The City has conducted a thorough analysis of pipeline and pending developments and has determined that sites over ½-acre (when consolidated) are developing, on average, at the equivalent of 98 dwelling units per acre as shown in Table 6-7 below.

TABLE 6-7: PIPELINE AND PENDING PROJECT DENSITIES ON CONSOLIDATED SITES OVER ½-ACRE

Address	Parcel Size (Acres)	Total Units	Density (Units/Acre)	Zoning	Density Bonus
803 Belmont Avenue (100% Affordable)	1.46	125	86	CMU	Yes – number of units and height
815 Old County Road	1.74	177	102	VCS	Yes – FAR, height and bulk
580 Masonic Way	1.24	139	112	VCS	Yes – to be determined
1325 Old County Road	2.08	250	120	VCMU	No – applicant did not request
608 Harbor Blvd.	0.71	103	145	HIA	Yes – for building code (reach code) requirements
Firehouse Square 1 1300 El Camino Real (100% Affordable)	0.72	66	91	VC	Yes – parking
Firehouse Square 2	0.52	15	29	VC	No
Average Units Per Acre			**98**		

Source: City of Belmont, 2024.

To be conservative, the City has assumed a density of 75 dwelling units per acre for the identified housing opportunity sites over ½-acre in the Sites Inventory. The only exception to this is 832 Belmont Avenue (0.73 acres after consolidation) which has an assumed density of 35 dwelling units per acre. This site is located on a steep hillside which limits development capacity. As a result, the density assigned was based on preliminary development proposal previously considered for the site.

The City has three projects currently in the pipeline on sites that are less than a ½-acre and they have widely varying densities ranging from 33 to 181 units per acre as shown in Table 6-8. Despite there not being a large sample size, it does demonstrate interest and feasibility of developing these smaller sites independent of lot consolidations. In particular, 678 Ralston is proposed by an experienced affordable housing developer that has been successful at getting tax credits and completing projects. They have indicated interest in developing another property under ½ acre in the City as well. Based on this information, the City is confident that projects with affordable units are feasible on sites less than ½ acre. To be conservative, the City is assuming a density of 30 dwelling units per acre for the sites less than a ½-acre in the Housing Sites Inventory.

TABLE 6-8: PIPELINE AND PENDING PROJECT DENSITIES ON SITES UNDER ½-ACRE

Address	Parcel Size (Acres)	Total Units	Density (Units/Acre)	Zoning	Density Bonus
Hill Street at El Camino Real (100% Affordable)	0.32	37	116	VC	Yes – FAR, height, bulk, setback
1477 El Camino Real	0.15	5	33	CMU	No
678 Ralston Ave (100% Affordable)	0.36	64	181	VCMU	Yes – to be determined, expected to include FAR and height
Average Units Per Acre			**110**		

Source: City of Belmont, 2024.

Housing Element Program H4.1 directs the City to modify the Corridor Mixed Use (CMU) and Village Station Core (VSC) zoning districts to eliminate the maximum residential density and increase the allowable FAR, so that these zoning districts align with development capacity in the more intensive BVSP districts. These Zoning Ordinance amendments were completed in January 2024.

While these Zoning Ordinance amendments were not required for Belmont to meet the RHNA allocation, they eliminate a potential constraint to housing development and ensure that the Sites Inventory projections are both realistic and achievable. The zoning amendments also ensure that multi-family housing projects achieving higher densities can provide lower-income housing units.

With the Zoning Ordinance amendments completed in January 2024, all of the sites in the Housing Sites Inventory are located in zoning districts that allow unlimited density. As a result, the Floor Area Ratio (FAR) is an important measure of the capacity of the sites in the Inventory. All of the sites in the Housing Sites Inventory have an allowed FAR of 2.0. The Metropolitan Transportation Commission (MTC) has issued guidance for its Transit-Oriented Communities Policy that provides equivalencies for cities that do not use maximum density to determine the intensity of development. These equivalencies are "default" standards based on sample projects. MTC guidance equates 1.5 to 1.99 FAR as 75 dwelling units per acre. Between 2.0 and 2.99 FAR is equivalent to 100 dwelling units per acre. Therefore, it is reasonable to conclude that Belmont's FAR of 2.0 will be sufficient to reach the 75 unit per acre density assumed in the Sites Inventory based on MTC's analysis of sample projects in the Bay Area.

Specific to Belmont, the City requires an inclusionary housing requirement on all projects of 25 units or greater. The developer is required to construct those units; there is not an option to pay an in-lieu fee. Once a developer complies with the City's inclusionary housing requirements, they are automatically eligible to apply the State Density Bonus law. Since the City uses FAR as the primary measure of development intensity, the FAR limit is automatically increased for Density Bonus projects. No discretionary action is required for this bonus. State Density Bonus law is applied to the FAR limit as described below.

Ownership housing projects in Belmont:

- Requirement of 15% moderate income units.
- Under State law, 15% moderate income units entitles the applicant to a 10% bonus.
- 2.0 FAR x 10% bonus = 0.2 bonus.
- 2.0 FAR + 0.2 bonus = 2.2 effective FAR.

Rental housing projects in Belmont:

- Requirement of 15% low-income units.
- Under State law, 15% low-income units entitles the applicant to a 27.5% bonus.
- 2.0 FAR x 27.5% bonus = 0.55 bonus.
- 2.0 FAR + 0.55 bonus = 2.55 effective FAR.

While the City's Zoning Ordinance includes a base FAR of 2.0, the effective FAR for housing projects of 25 units or greater is actually 2.2 for ownership projects and 2.55 for rental projects. As shown in Table 6-9 below, the City has a proven track record of approving projects over 75 units per acre in this FAR range, which demonstrates that FAR is not a constraint on development at the density assumed for Housing Inventory sites.

The sites in the Housing Inventory have Zoning Ordinance height limits of 45 to 50 feet. The development standards allow encroachments into the height limit for non-habitable spaces such as equipment and stairs. Similar to the FAR analysis above, the height of housing projects can be increased through State Density Bonus law; however, this is not always required to reach densities above 75 units per acre. As shown in Table 6-9, the height of recent pipeline and pending projects has ranged from 53-65 feet and four to six stories. The projects at 803 Belmont and 815 Old County Road utilized Density Bonus to achieve the height. 1325 Old County Road complies with the height limit of the zoning district. Firehouse Square 1 was a partnership with a non-profit developer on City-owned land which utilized Density Bonus and Community Benefits to achieve development standards that met the goals of the project. This project history demonstrates that height is not a constraint on development at the assumed density of 75 units per acre for Housing Inventory sites.

TABLE 6-9: FLOOR AREA RATIO (FAR) AND HEIGHT FOR PIPELINE AND PENDING PROJECTS

Project Address	Density (Units/Acre)	FAR	Height/Number of Stories	Number of Lower-Income Units	Total Number of Units
803 Belmont	86	1.92	65'/6	124	125
815 Old County Road	102	2.03	60'/5	27	177
1325 Old County Road	120	2.46	53'/4	35	250
Firehouse Square I	91	2.37	64'/4	65	66

Source: City of Belmont, 2024.

The City of Belmont also has a Community Benefits program that allows applicants to apply for relaxed development standards in exchange for benefits for the larger community. This tool has been used to further facilitate affordable housing projects in the city. It is not analyzed in depth

here because it is a discretionary process and an additional tool separate from the City's zoning and State Density Bonus. It is an additional way the City can support affordable housing projects but it is not necessary to meet the City's RHNA.

For all opportunity sites, the distribution of units by income category was determined using the common methodology of matching the RHNA affordability distribution of 27% Very Low-Income, 16% Low-Income, 16% Moderate-Income, and 41% Above Moderate-Income. The distribution was also applied to the sites under ½-acre in size as the city's development history demonstrates that affordable housing is feasible on smaller sites. Only four properties in the Sites Inventory are under ½-acre. Three of those sites are a similar size to 678 Ralston, where an affordable housing project is proposed, and the fourth site is owned by the City. Based on these specific characteristics, the City concludes that affordable housing is feasible on those four sites.

Residential Development in Mixed Use Zoning Districts

Multi-family residential housing developments are the foundation of the vision for the Belmont Village districts and CMU district along El Camino Real. All of the Housing Inventory Sites are located in these zoning districts. The City has a strong record of completed and approved multi-family developments in mixed-use zoning districts. In the Belmont Village and CMU districts, retail and restaurant uses are allowed but are expected to be located on the ground floor of multi-story buildings and are therefore not an impediment to housing production. Office uses are allowed in these districts but it is unlikely that major office uses would locate in the mixed-use districts because there are other locations in the City that are better suited for major office development.

Since 2017, there have been no proposals for office development in these areas, even before the slowdown in office demand resulting from the COVID-19 pandemic. Smaller, locally serving office may develop over time but the City has not received any proposals for those types of uses since 2017. Therefore, the City does not anticipate receiving applications for 100% commercial projects in the mixed-use zones. Program H4.7 commits the City to monitor commercial development in mixed-use zones and make necessary changes if trends change during the planning period. For a detailed discussion, please see *Chapter 4, Constraints*, under Section 4.2, Governmental Regulations and Constraints, Multi-Family Housing subheading.

Sites Used in Previous Planning Periods Housing Elements

As shown in Appendix B, the Sites Inventory includes a number of sites that were included in the sites inventory of Housing Elements from prior periods. However, these sites have been subsequently rezoned to allow for higher residential development capacity as part of the 2017 General Plan Update and adoption of the Belmont Village Specific Plan. This rezoning was not required for any of the sites to accommodate the RHNA capacity assigned to them in the 2015-2023 Housing Element. As a result, per HCD guidance, these sites can be considered as new sites for the purpose of the housing element inventory. The sole exception was the 580 Masonic

site which was zoned as commercial and had to be rezoned to allow for residential uses. That site is currently a pending project and is described earlier in this chapter.

AFFORDABILITY MIX

For all opportunity sites, the distribution of units by income category was determined using the common methodology of matching the RHNA affordability distribution of 27% Very Low-Income, 16% Low-Income, 16% Moderate-Income, and 41% Above Moderate-Income. The distribution was also applied to the sites under ½-acre in size as the city's development history demonstrates that affordable housing is feasible on smaller sites. Only four properties in the Sites Inventory are under ½-acre. Three of those sites are a similar size to 678 Ralston, where a 100% affordable housing project is proposed, and the fourth site is owned by the City. Based on these specific characteristics, the City concludes that affordable housing is feasible on those four sites. The City anticipates that when developed, the projects will either be 100% affordable or will comply with the City's Inclusionary Housing policy.

SITE CONSOLIDATIONS

The Housing Sites Inventory includes 30 sites that are less than a ½-acre in size. Of these sites, 26 have the potential to be consolidated into a larger, more usable development site with adjacent parcels. Consolidation is most likely to occur if the parcels are under the same ownership. In addition, it is easier to consolidate parcels if there are a limited number of owners to negotiate with and a small number of overall parcels involved. With these considerations in place, the Housing Sites inventory consolidated development sites have no more than two owners and three parcels (with the exception of Sites B and R which each have a single owner and five parcels). Three City-owned vacant parcels are also part of the small sites included on the Inventory.

As described earlier in this chapter in the Recent Development Trends analysis, the City of Belmont has a strong track record of small lot consolidation to create larger development parcels. To further encourage future lot consolidation, a new program providing incentives for lot consolidation is included in the Housing Element (see Program H4.3, Lot Consolidation Fee Waivers).

The proposed lot consolidation opportunity sites in the Housing Sites Inventory, each of which is detailed in Section 6.4, have varying sizes and existing conditions and have been evaluated to meet enough criteria needed to reasonably expect development potential during the planning period.

NON-VACANT SITES

California State law requires that for non-vacant sites, the City must demonstrate the potential and likelihood of additional development within the planning period, based on the extent to which existing uses may constitute an impediment to additional residential development, past experience with converting existing uses to higher-density residential development, current

market demand for the existing use, any existing leases or other contracts that would perpetuate the existing use or prevent redevelopment of the site for additional residential development, development trends, market conditions, and regulatory or other incentives or standards to encourage additional residential development on these sites. Furthermore, if non-vacant sites accommodate 50% or more of the lower-income RHNA, the City must demonstrate that the existing use is not an impediment to additional development and will likely discontinue in the planning period, including adopted findings based on substantial evidence.

New multi-family development within Belmont will be predominantly located within Downtown transit corridors, where there are very few sites that can be considered vacant. Given the lack of vacant land, the City has developed a substantial track record of non-vacant sites redeveloping from non-housing to housing uses, including sites with active commercial uses. As described under the Recent Development Trend subsection of this chapter and shown in Table 6-6, 993 out of 1,023 total pipeline units are being developed on non-vacant sites. Of these units, 381 units are affordable, either because of inclusionary obligations or because they are 100% affordable projects.

Available Infrastructure and Utilities

It is anticipated that the city has adequate capacity to meet demand and adequate capacity to expand to meet projected development as part of the Housing Element. Current facilities and/or infrastructure are reported to be in good operating condition. Larger housing development projects may require the installation of utility infrastructure to accommodate individual project impacts, including water main lines, upsized sewer lines, and/or additional lateral connections within the city. Infrastructure installations necessary to serve future development would generally be installed within the already disturbed rights-of-way of existing roads or within the disturbance footprints of development projects. Implementation of proposed capital improvement projects for the Silicon Valley Clean Water treatment plant would ensure adequate capacity to serve projected demand. A more in-depth discussion of infrastructure and utility availability is included in *Chapter 4, Constraints*.

A copy of the updated Housing Element and growth projections is provided to utility providers to ensure long term service planning and capital improvements will provide sufficient capacity to accommodate the City's regional housing need for the planning period.

Environmental Site Constraints

One of the most prominent site characteristics in Belmont that can impede housing development is the presence of steep slopes and unstable terrain, which result from the city's proximity to the San Andreas fault. These steep hillside areas would not be appropriate for medium or high-density residential; therefore, the Sites Inventory focuses on areas away from the hillsides and near major transit corridors.

Two City-owned properties in the Sites Inventory, Firehouse Square 1 and Hill Street at El Camino Real, contain(ed) underground storage tanks (USTs) subject to environmental remediation and removal. The UST at Firehouse Square 1 was removed and the site has been fully remediated, and construction of 66 affordable housing units is complete.

At Hill Street at El Camino, the City has approved contributing the land at no cost to the affordable housing developer (valued at $4M) and is contributing an additional loan of up to $1M, and in return is requiring 37 lower-income housing units. This project has applied for TCAC funding and is expected to be built during this planning period. The UST located on this site will be removed in concert with the initial site grading and has been included in the project development budget. Exposure to soil vapor will be controlled and follow-up testing will be completed in accordance with the direction and oversight of the San Mateo County Environmental Health Department (SMCEHD). Prior to beginning construction, the City of Belmont Community Development Department must receive assurance from SMCEHD that the site has been fully remediated and is safe for housing.

The City has prepared an Environmental Impact Report (EIR), pursuant to the California Environmental Quality Act (CEQA) Guidelines, which comprehensively analyzed the environmental impacts of housing development identified in the Housing Element. The EIR identified significant unavoidable impacts related to construction related noise and identifies the following mitigation measures to ensure safe housing development.

- **Air Quality Measures During Construction** – All development facilitated by the project shall be required to reduce construction emissions of reactive organic gases, nitrogen oxides, and particulate matter (PM10 and PM2.5) by implementing the Bay Area Air Quality Management District's (BAAQMD's) Basic Construction Mitigation Measures or equivalent, expanded, or modified measures based on project and site-specific conditions.
- **Air Quality Building Design Measures** – Prior to issuance of building permits for residential developments within 1,000 feet of State Route 82 (i.e., El Camino Real), a roadway health risk assessment (HRA) shall be prepared by a qualified air quality analyst. The roadway HRAs shall demonstrate that roadway impacts are below the BAAQMD's single-source risk and hazard thresholds. If risks and hazards exceed the applicable BAAQMD thresholds, then feasible project design features such as high-efficiency filtration shall be incorporated into the project.
- **Noise During Construction** – For projects involving pile drivers, vibratory rollers, or similar high-vibration equipment, the applicant shall prepare a Vibration Control Plan prior to the commencement of construction activities. The Vibration Control Plan shall be prepared by a licensed structural engineer and shall include methods to minimize vibration.

6.4 SITES INVENTORY

Figure 6-1 shows all adequate housing opportunity sites within the city of Belmont and Table 6-10 summarizes these sites according to how the City will utilize them to meet its RHNA. Based on pipeline and pending projects, projected ADU production, and the realistic capacity of the adequate sites inventory identified here within, the City has capacity to develop 2,289 new housing units, including a "buffer" to comply with the "No Net Loss" provisions (see Table 6-10 for the Sites Summary). This projection of sites inventory units does not require any land use or zoning changes but does assume that projects will continue to utilize State Density Bonus provisions to achieve full development potential (as described in the Realistic Capacity section above).

Per HCD guidance, the City's Sites Inventory is described herein on a site-by-site basis and organized according to vacant and non-vacant land resources. It should be noted that a majority of the City's adequate sites are non-vacant land resources as identified within this subsection.

As discussed in *Chapter 3, Affirmatively Furthering Fair Housing Summary*, the City of Belmont is a high-resource community that does not include any moderate or low resources areas. The highest opportunity areas are west of El Camino/Old County Road, while the remainder of Belmont are in high opportunity areas. All sites, including those suitable for affordable to lower-income households, are located in the high or highest opportunity areas. Although Belmont does not have a pattern of segregation within the city, from a broader regional perspective, providing increased lower-income housing opportunities in a high resource community such as Belmont will help overcome countywide and regional patterns of segregation, disparate impacts for impacted racial and ethnic groups, and foster more inclusive communities free from barriers that restrict access to opportunity.

Figure 6-1: Sites Inventory Map

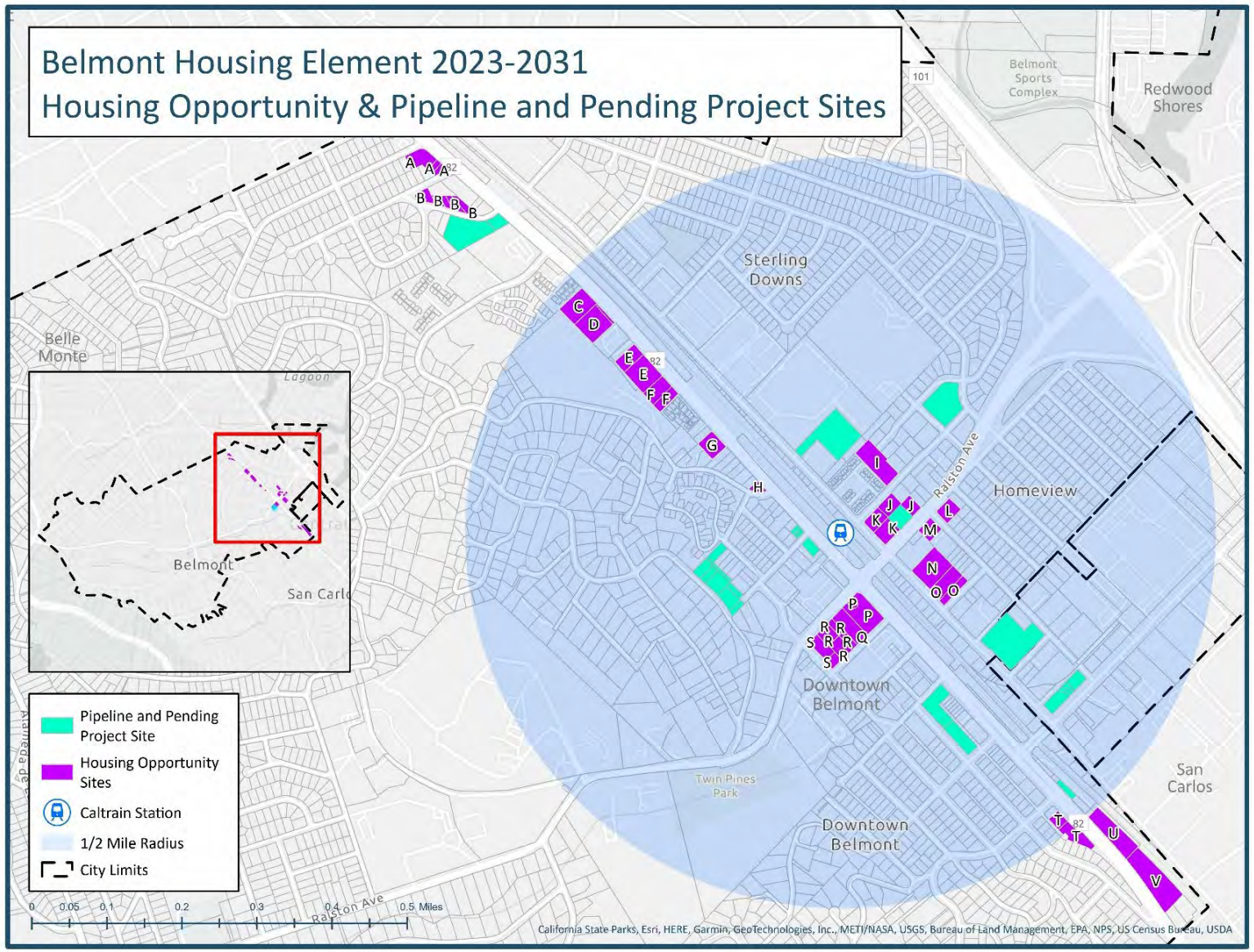


TABLE 6-10: SITE INVENTORY SUMMARY

Site ID	Site Address	APN	General Plan/Zoning	Acres	Assumed Density (Acres)	Existing Use	VLI	LI	MOD	AM	Total
A	210-230-240 El Camino Real	044-152-100 044-152-110 044-152-120	CMU	0.69	75	Commercial	14	8	8	22	52
B	832 Belmont Ave, Anita Ave	044-173-010 044-173-120 044-173-190 044-173-210 044-173-220	CMU	0.73	35	Vacant	7	4	4	10	25
C	510 El Camino Real	044-201-180	CMU	0.81	75	Commercial Restaurant	16	10	10	25	61
D	516 El Camino Real	044-201-040	CMU	0.85	75	Commercial Store	17	10	10	26	63
E	530 El Camino Real	044-201-080 044-201-070	CMU	1.28	75	Commercial Store and Parking	26	15	15	40	96
F	500-564 El Camino Real	044-201-280 044-201-270	CMU	0.76	75	Commercial Hotel and Auto Repair	16	9	9	23	57
G	690 El Camino Real	044-222-210	CMU	0.44	30	Commercial	4	2	2	5	13
H	780 El Camino Real	044-222-180	CMU	0.12	30	Vacant	1	0	0	2	3
I	640 Masonic Way	040-312-180	VCS	0.97	75	Public Facilities – Post Office	20	11	12	30	73
J	Masonic Way 600 Ralston Avenue	040-313-310 040-313-270	VCS VCMU	0.58	75	Parking and Commercial Restaurant	12	7	7	17	43
K	698 Ralston Avenue 951 Old County Road	040-313-140 040-313-430	VCMU	0.73	75	Commercial Restaurant and Retail	15	9	9	22	55
L	575 Ralston Avenue	040-334-300	VCMU	0.36	30	Commercial Restaurant	3	2	2	4	11
M	601 Ralston Avenue	040-332-220	VCMU	0.35	30	Commercial Retail	3	1	2	4	10
N	1075 Old County Rd	040-332-270	VCMU	0.96	75	Commercial Offices	20	11	11	30	72
O	1141-1161 Old County Rd	040-332-110 040-332-260	VCMU	0.82	75	Industrial Offices and Shops	16	10	9	26	61
P	1000 El Camino Real Ralston Avenue at El Camino, Emmett's Plaza	045-182-250 045-182-260	VC	1.01	75	Commercial Retail and Restaurants, Plaza	21	12	12	31	76
Q	883 Ralston Avenue	045-182-270	VC	0.61	75	Commercial Restaurants and Offices	13	7	7	19	46

Site ID	Site Address	APN	General Plan/Zoning	Acres	Assumed Density (Acres)	Existing Use	VLI	LI	MOD	AM	Total
R	915 Ralston Avenue 925 Ralston Avenue 940 Emmett Street 940 Emmett Street 945 Ralston Avenue	045-182-040 045-182-030 045-182-200 045-182-210 045-182-020	VC	0.89	75	Commercial Retail, Offices, Restaurants and Services Parking	18	10	11	28	67
S	1085 Sixth Avenue 995 Ralston Avenue	045-182-220 045-182-010	VC	0.53	75	City parking lot and Commercial	11	6	6	17	40
T	1520 El Camino Real 1538 El Camino Real	045-253-300 045-253-290	VCMU CMU	0.66	75	Commercial Retail and Services	14	8	8	20	50
U	1501 El Camino Real	045-252-080	CMU	1.02	75	Commercial Retail and Services	21	12	12	31	76
V	1601 El Camino Real	045-252-100	CMU	1.68	75	Commercial Retail, Offices, and Restaurant	34	20	20	52	126
						Total Units	**322**	**184**	**186**	**484**	**1,176**

Source: City of Belmont, 2024.

VACANT SITES

There are two housing sites identified as vacant in the Sites Inventory. Please note several "vacant" parcels throughout the city that were identified as suitable for residential development are not included within this subsection and are instead included within the "Non-Vacant (Underutilized) Land" subsection due to their proposed consolidated development along with non-vacant parcels.

832 BELMONT AVENUE, ANITA AVENUE (SITE B)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-173-120	832 Belmont Avenue	0.149	Vacant	0	5	N/A	N/A
044-173-190	832 Belmont Avenue	0.180	Vacant	0	6	N/A	N/A
044-173-210	832 Belmont Avenue	0.094	Vacant	0	3	N/A	N/A
044-173-220	832 Belmont Avenue	0.096	Vacant	0	4	N/A	N/A
044-173-010	Anita Avenue	0.208	Vacant	0	7	N/A	N/A
TOTAL		**0.73**		**0**	**26**		

Site B is comprised of five vacant lots totaling 0.7 acres after consolidation and are currently zoned Corridor Mixed Use (CMU). Given the steep slope of the site, a density of 35 du/acre was used to calculate a realistic capacity of 26 units. All of the parcels are under the same ownership and the owner had previously submitted a development application considering building between 25 to 37 units on the property. Given the prior development interest and the consolidated ownership of the parcels, this site is likely to develop within the planning period.

780 EL CAMINO REAL (SITE H)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-222-180	780 El Camino Real	0.12	Vacant lot	0	3	N/A	N/A
TOTAL		**0.12**		**0**	**3**		

This 0.12-acre housing site is currently zoned Corridor Mixed Use (CMU). A density of 30 du/acre was used to calculate a realistic capacity of 3 units. The site is a vacant City Housing Successor owned property and is located on the El Camino Real transit corridor. Habitat for Humanity has expressed interest in the past to construct 4 to 7 units on the site. This site is similar in size to the pending project at 1477 El Camino Real, a 0.15-acre site that has 5 units proposed. The City intends to issue a request for proposals, pursuant to the Surplus Property Act, to solicit a residential development proposal for this site during the planning period.

NON-VACANT (UNDERUTILIZED) SITES

New multi-family development within Belmont will be predominantly located within Downtown transit corridors, on non-vacant sites, with the exception of vacant parcels that are included as part of site consolidations. As a result, more than 50% of the Sites Inventory, 20 out of 22 sites, are on non-vacant parcels. This subsection includes an analysis of each site demonstrating that these sites have characteristics that are similar to the recent development trends for pipeline and pending housing projects and are therefore likely to develop during the next planning period.

210-230-240 EL CAMINO REAL (SITE A)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-152-100	210 El Camino Real	0.50	Service Retail	0.25	37	1954	1
044-152-110	230 El Camino Real	0.09	Office and residence	0.30	7	1954	2
044-152-120	240 El Camino Real	0.10	Service Retail	0.51	8	1956	1
TOTAL		**0.69**		**0.25-0.51**	**52**		

This housing site is comprised of three lots totaling 0.69 acres after consolidation and is currently zoned Corridor Mixed Use (CMU). 210 and 230 El Camino Real parcels are under the same ownership. Given the age of the buildings, single-story buildings, and low ILR, the existing uses at this site are not considered an impediment to consolidation and development. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 52 units.

510 EL CAMINO REAL (SITE C)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-201-180	510 El Camino Real	0.81	Restaurant	0.17	61	1963	1
TOTAL		**0.81**		**0.17**	**61**		

This 0.81-acre housing site is currently zoned Corridor Mixed Use (CMU). The site is currently used as a single-story restaurant with an expansive surface parking lot. This is an underutilized site with a low ILR and the existing building is over 60 years old, therefore the existing use should not be considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 61 units.

516 EL CAMINO REAL (SITE D)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-201-040	516 El Camino Real	0.85	Large Format Retail	0.26	63	1960	1
TOTAL		**0.85**		**0.26**	**63**		

This 0.85-acre housing site is currently zoned Corridor Mixed Use (CMU). The site currently houses a single-story retail establishment with an expansive surface parking lot. This is an underutilized site with a low ILR and the existing building is over 60 years old, therefore the existing use should not be considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 63 units.

530 EL CAMINO REAL (SITE E)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-201-080	530 El Camino Real	0.87	Truck rental	0.38	65	1955	2
044-201-070	530 El Camino Real	0.41	Truck rental parking lot	0	31	1956	N/A
TOTAL		**1.27**		**0-0.38**	**96**		

Site E includes two lots totaling 1.27 acres after consolidation and is currently zoned Corridor Mixed Use (CMU). Both parcels are under the same ownership and are being used as a truck rental facility. This is an underutilized site with a low ILR and the existing building is over 65 years old, therefore the existing use should not be considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 96 units. This site is similar in size and age to the 1.26-acre pipeline project located at 580 Masonic Way, which would replace a strip plaza built in 1956 with 139 units.

500-564 EL CAMINO REAL (SITE F)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-222-210	500 El Camino Real	0.45	Motel	0.28	34	1953	2
044-201-270	564 El Camino Real	0.31	Auto repair and service retail	0.41	23	1959	1
TOTAL		**0.76**		**0.28-0.41**	**57**		

This housing site includes two lots totaling 0.76 acres after consolidation and is currently zoned Corridor Mixed Use (CMU). The existing uses include a motel and a commercial building. Both parcels are under the same ownership. There has been no development interest to date on this site. Given the age of the buildings (over 65 years old), common ownership, and low ILR, the existing uses at this site are not considered an impediment to redevelopment. A density of 75 du/acre was used to calculate a realistic capacity of 57 units This site is similar in size to the 0.71-acre pipeline project located at 608 Harbor Blvd, which consolidated 4 parcels developed with a gas station, former railroad track, and self-service car wash and proposes 103 units.

690 EL CAMINO REAL (SITE G)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-222-210	690 El Camino Real	0.44	Service retail	0.45	13	1965	1
TOTAL		**0.44**		**0.45**	**13**		

This housing site is 0.44 acres and is currently zoned Corridor Mixed Use (CMU). The building is one-story service retail use, is close to 60 years old, and has a low ILR, therefore the existing use should not be considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 30 du/acre was used given that the site is under ½ an acre to calculate a realistic capacity of 13 units. This site is similar in building age and parcel size to the pipeline project at 678 Ralston Ave, a 0.36-acre site with a building constructed in 1961 with 65 units of affordable housing proposed.

640 MASONIC WAY (SITE I)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
044-222-180	640 Masonic Way	0.97	USPS Post office	0.31	73	1964	1
TOTAL		**0.97**		**0.31**	**73**		

This 0.97-acre housing site is currently zoned Village Station Core (VSC). The site is currently in use as a Post Office but has a short-term lease and the ownership entity has reached out to the City to explore future options for redevelopment. The building is one-story, has an expansive surface parking lot, is 60 years old, and has a low IPR, therefore the existing use should not be considered an impediment to redevelopment. A density of 75 du/acre was used to calculate a realistic capacity of 73 units.

MASONIC WAY AND 600 RALSTON AVENUE (SITE J)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-313-310	Masonic Way	0.33	restaurant parking lot	0	25	N/A	N/A
040-313-270	600 Ralston Avenue	0.24	restaurant	0.52	18	1988	2
TOTAL		**0.57**		**0-0.52**	**43**		

This housing site includes two lots totaling 0.57 acres after consolidation. Although these parcels are not immediately adjacent, the existing uses are currently connected since the parking lot is used solely by the restaurant building and both properties are under the same ownership. Masonic Way is currently zoned Village Station Core (VSC) and 600 Ralston Avenue is currently Village Core Mixed Use (VCMU). Given that both parcels are under the same ownership, are currently used in tandem, and have a low ILR, these properties will most likely be consolidated and the existing use does not present an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 43 units.

698 RALSTON AVENUE AND 951 OLD COUNTY ROAD (SITE K)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-313-140	698 Ralston Avenue	0.39	Fast food restaurant	0.15	30	1983	1
040-313-430	951 Old County Road	0.34	Multi-unit commercial retail/services	0.41	25	1987	1
TOTAL		**0.73**		**0.15-0.41**	**55**		

This housing site is comprised of two lots totaling 0.73 acres after consolidation. It is currently zoned Village Corridor Mixed Use (VCMU) and is adjacent to the Belmont Caltrain Station. These parcels are under separate ownership. Given the low ILR and single-story buildings, the existing uses at this site are not considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 55 units.

575 RALSTON AVENUE (SITE L)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-332-220	575 Ralston Avenue	0.36	Restaurant	0.16	11	1969	1
TOTAL		**0.36**		**0.16**	**11**		

This housing site is currently zoned Village Core Mixed Use (VCMU). The site is currently occupied by a single-story restaurant with surface parking. Given the age of the building, low ILR, and single-story building, the existing use at this site is not considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. Since this site is less than ½ an acre, a density of 30 du/acre was used to calculate a realistic capacity of 11 units. This site is similar in parcel size to the pending project at 678 Ralston, which is 0.36 acres and proposes 65 units.

601 RALSTON AVENUE (SITE M)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-334-300	601 Ralston Avenue	0.35	Retail	0.26	10	1965	1
TOTAL		**0.35**		**0.26**	**10**		

This housing site is 0.35 acres. It is currently zoned Village Core Mixed Use (VCMU). This is an underutilized retail property with extensive surface parking. The building is close to 60 years old, has a low ILR, and is single-story, therefore the existing use should not be considered an impediment to redevelopment. There has been no development interest to date on this site. Since this site is less than ½ an acre, a density of 30 du/acre was used to calculate a realistic capacity of 10 units. This site is similar in parcel size to the pending project at 678 Ralston, which is 0.36 acres and proposes 65 units.

1075 Old County Road (Site N)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-332-270	1075 Old County Road	0.96	Class C Office building	0.54	72	1983	1
TOTAL		**0.96**		**0.54**	**72**		

This housing site is 0.96 acres and is currently zoned Village Corridor Mixed Use (VCMU). The Class C office building currently has vacant space for lease. The site is proximate to the Belmont Caltrain Station. Given the low ILR, single-story building, and current vacancies, the existing use at this site is not considered an impediment to redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 72 units.

1141 OLD COUNTY ROAD AND 1161 OLD COUNTY ROAD (SITE O)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
040-332-260	1141 Old County Road	0.54	Warehouse	0.54	40	1983	1
040-332-110	1161 Old County Road	0.28	Warehouse	0.75	21	1960	1
TOTAL		**0.82**		**0.54-0.75**	**61**		

Site O includes two parcels totaling 0.82 acres after consolidation and is currently zoned Village Corridor Mixed Use (VCMU). The properties are currently being used for light industrial warehouse purposes and are under separate ownership. The site is proximate to the Belmont Caltrain Station. Given the age of the buildings, low ILR, and single-story buildings, the existing uses at this site are not considered an impediment to consolidation and redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 61 units.

1000 EL CAMINO REAL AND RALSTON AVENUE AT EL CAMINO REAL, EMMETT'S PLAZA (SITE P)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-182-250	1000 El Camino Real	0.94	Commercial retail and service uses strip mall	0.37	70	2000	1
045-182-260	Ralston Avenue at El Camino Real, Emmett's Plaza	0.07	public open space	0	6	N/A	N/A
TOTAL		**1.01**		**0-0.37**	**76**		

Site P includes two lots totaling 1.01 acres after consolidation and is currently zoned Village Corridor (VC) in the Belmont Village Specific Plan area. The larger parcel is currently used as a retail strip center with surface parking. The smaller lot at Ralston Avenue at El Camino Real is a City-owned site that is used as an open space plaza, which is intended as an interim use to allow for future redevelopment of the site when consolidated with the adjacent parcels. The site is proximate to the Belmont Caltrain Station. Given the low ILR and single-story buildings, the existing uses at this site are not considered an impediment to redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 76 units.

883 RALSTON AVENUE (SITE Q)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-182-270	883 Ralston Avenue	0.61	Multi-unit restaurant/service retail	0.20	46	1958	1
TOTAL		**0.61**		**0.20**	**46**		

This housing site is 0.61 acres and is currently zoned Village Corridor (VC). This is an underutilized site and given the age of the building, low ILR, and single-story building the existing uses at this site are not considered an impediment to redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 46 units.

915-945 RALSTON AVENUE AND 940 EMMETT STREET (SITE R)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-182-040	915 Ralston Avenue	0.13	Vacant retail	0.80	10	1970	1
045-182-030	925 Ralston Avenue	0.13	Retail store parking lot	0	10	N/A	N/A
045-182-200	940 Emmett Street	0.17	Office parking	0	12	N/A	N/A
045-182-210	940 Emmett Street	0.31	Professional Offices	0.46	23	1972	2
045-182-020	945 Ralston Avenue	0.15	Multi-unit commercial restaurant/service retail	0.54	12	1960	1
TOTAL		**0.89**		**0-0.80**	**68**		

This housing site is comprised of five lots totaling 0.89 acres after consolidation and is currently zoned Village Corridor (VC). The sites are owned by a single owner who has expressed interest in redeveloping the site. The buildings are over 50 years old and currently have vacancies, therefore the existing use should not be considered an impediment to redevelopment. A density of 75 du/acre was used to calculate a realistic capacity of 68 units. This site is similar to the 608 Harbor pipeline project, which consolidated four parcels resulting in a 0.71-acre site and 103 units.

1085 SIXTH AVENUE AND 995 RALSTON AVENUE (SITE S)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-182-220	1085 Sixth Avenue	0.17	City Hall parking lot	0	13	N/A	N/A
045-182-010	995 Ralston Avenue	0.36	Gas station and auto repair	0.07	27	1974	1
TOTAL		**0.53**		**0-0.07**	**40**		

Site S includes two lots totaling 0.53 acres after consolidation and is currently zoned Village Corridor (VC). 1085 Sixth Avenue is a City-owned site which is being used as a parking lot on an interim basis pending future redevelopment. The adjacent property is a 50-year-old building used as a gas station and auto repair shop and has a very low ILR, therefore the existing uses should not be considered an impediment to redevelopment. There has been prior development interest in this site although no planning applications were submitted. A density of 75 du/acre was used to calculate a realistic capacity of 40 units.

1520 El Camino Real and 1538 El Camino Real (Site T)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-253-300	1520 El Camino Real	0.20	Used car lot	0.09	15	1959	1
045-253-290	1538 El Camino Real	0.47	Multi-unit retail and service uses strip mall	0.43	35	1988	1
TOTAL		**0.67**		**0.09-0.43**	**50**		

This housing site includes two lots totaling 0.67 acres after consolidation. 1520 El Camino Real is currently zoned Village Corridor Mixed Use (VCMU) and 1538 El Camino Real is currently zoned Corridor Mixed Use (CMU). The commercial strip mall at 1538 El Camino has several vacancies. Given the low ILR and single-story buildings, the existing uses at this site are not considered an impediment to consolidation and redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 50 units.

1501 EL CAMINO REAL (SITE U)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-252-080	1501 El Camino Real	1.02	Multi-unit commercial retail strip center	0.39	76	1980	1
TOTAL		**1.02**		**0.39**	**76**		

This housing site is 1.02 acres and is currently zoned Corridor Mixed Use (CMU). The property is used as a commercial retail strip center with both tuck-under and surface parking. The property currently has multiple vacant spaces. Given the age of the building and low ILR, the existing uses at this site are not considered an impediment to redevelopment. There has been no development interest to date on this site. A density of 75 du/acre was used to calculate a realistic capacity of 76 units.

1601 EL CAMINO REAL (SITE V)



APN	Address	Acres	Existing Use	Improv/ Land Ratio	Total Capacity	Building Age	Building Stories
045-252-100	1601 El Camino Real	1.68	Multi-unit commercial retail strip center	0.20	126	1958	1
TOTAL		**1.68**		**0.20**	**126**		

This housing site is 1.68 acres and is currently zoned Corridor Mixed Use (CMU). This property is a commercial retail/office strip center with ample surface parking. There are currently several vacancies in the strip center. Given the buildings are over 60 years old, have a low ILR, are single-story, and have vacancies, the existing uses at this site are not considered an impediment to redevelopment. There has been no development interest to date on this site. This site is similar to the pending project at 580 Masonic Way, a 1.26-acre site with 139 units proposed and an ILR of 0.32. A density of 75 du/acre was used to calculate a realistic capacity of 126 units.

6.5 SITES SUMMARY

State Housing Element Law requires local governments to prepare an inventory of land suitable for residential development, including vacant sites, sites having the potential for redevelopment, and an analysis of the relationship of zoning, public facilities, and services to these sites. The inventory of land suitable for residential development must be used to identify sites that can be developed for housing within the planning period.

Table 6-11 summarizes the City of Belmont's capacity to meet RHNA goals.

TABLE 6-11: SITES INVENTORY AFFORDABILITY BREAKDOWN

Housing Opportunity Sites	Very Low-Income	Low-Income	Moderate-Income	Above Moderate-Income	Total
2023-2031 RHNA	**488**	**281**	**283**	**733**	**1,785**
Pipeline Projects	131	175	21	487	814
Pending Projects	63	13	11	122	209
Projected ADUs	0	0	90	0	90
RHNA Credit Subtotal	**194**	**188**	**122**	**609**	**1,113**
Opportunity Sites	322	184	186	484	1,176
Total	**516**	**372**	**308**	**1,093**	**2,289**
Buffer	28	91	25	360	504
Buffer %	6%	32%	9%	49%	28%

Source: City of Belmont, 2024.

RHNA BUFFER

In 2017, Senate Bill (SB) 166 was signed into law and included new "no net loss" provisions that require communities to provide an ongoing, adequate supply of land resources for housing development during the entirety of the housing element update planning period. These provisions mean communities face risks of non-compliance should a housing site be developed with non-residential uses, lower residential densities, or residential uses at affordability levels higher than anticipated by the housing element. To avoid non-compliance, HCD advises communities to "buffer" their assigned RHNA numbers. The City of Belmont proposes a 28% buffer of 504 housing units, bringing the City's proposed potential development to 2,289 housing units, as shown in Table 6-11 above.

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7

HOUSING GOALS, POLICIES, AND PROGRAMS

California Government Code Section 65583(b)(1) requires the Housing Element to contain "a statement of goals, quantified objectives, and policies relative to the maintenance, preservation, and development of housing." Three types of statements are included in this section: goals, policies, and programs. Goals express broad, long-term statements for desired outcomes. The City has developed five goals pursuant to HCD requirements for the 6th Cycle relate to housing production, removal of constraints, housing preservation, promoting access to housing opportunities, and affirmatively furthering fair housing (AFFH).

Each goal is followed by policies intended to guide decision makers, staff, and other City representatives on how to achieve the goals. Specific programs are included to ensure the effective implementation of the policies. As required by law, quantified objectives have been developed for housing production, rehabilitation, and conservation. These are presented at the end of this section. The quantified objectives provide metrics for evaluating the effectiveness of the Element.

7.1 Goals, Policies, and Implementing Programs

GOAL H1: Produce new housing at all income levels, with a focus on affordable housing.

To meet the targets set by RHNA, the city will facilitate the production of abundant and affordable new housing in a wide diversity of unit types and sizes.

Policy H1.A: Provide adequate capacity to meet the Sites Inventory for Regional Housing Needs Allocation (RHNA).

Policy H1.B: Encourage a range of both market-rate and affordable housing in a variety of unit sizes and types to accommodate the varied housing needs of diverse households.

Policy H1.C: Coordinate with the local water and sewer agencies to assist in planning for adequate water and sewer service.

Program H1.1: Monitor Regional Housing Need Allocation and Residential Capacity. To ensure sufficient residential capacity is maintained to accommodate the RHNA for each income category throughout the planning period, continue to implement a formal, project-by-project evaluation procedure pursuant to Government Code section 65863.

Quantified Objectives:

- The City will track the number of units that have been constructed at each income level and the number of units to be built on the identified site to determine the remaining site capacity by income category. The records will be updated continuously as developments are approved.
- If a development is being approved on an identified site at a lower density than what was assumed in the Housing Element, additional adequate sites must be made available within 180 days of approving the development.

Geographic Target: Citywide

Implementation Timeline: 2024 - 2031 ongoing as projects are approved

Responsible Body: Housing and Planning Divisions

Funding Source(s): Community Development Department Budget

Program H1.2: Use Public Funding for Low/Moderate Income Housing. Use City affordable housing funds to produce additional affordable housing projects and to leverage other regional, state, and federal funding sources to support the construction of affordable housing.

Quantified Objectives:

- The City shall utilize local Affordable Housing Funds (Successor Agency Housing Funds, Inclusionary housing in-lieu funds, Commercial Linkage Fees, and Residential Development Mitigation Fees) to fund affordable housing development, and to leverage other public funding sources for affordable housing projects. Priority shall be given to development of housing at lower-income levels.
- Available and projected Affordable Housing Funds can leverage the production of 100 units during the planning period.

Geographic Target: Citywide

Implementation Timeline:

- 2024-2031 (Ongoing as developers apply for affordable housing projects).

Responsible Body: Housing Division

Funding Source(s): Affordable Housing Funds

Program H1.3: Water and Sewer Providers. Ensure immediate delivery of the Housing Element to water and sewer providers to facilitate streamline reviews and ensure adequate capacity for housing projects.

Quantified Objectives:

- Water and sewer service providers must establish specific procedures to grant priority water and sewer service to developments with units affordable to lower-income households based on jurisdictions' Housing Element's RHNA allocation (Gov. Code, Section 65589.7.) The City will immediately deliver the housing element to water and sewer service providers.

Geographic Target: Citywide

Implementation Timeline:

- Upon adoption in Spring 2024, the City will immediately send the Housing Element to applicable water and sewer providers.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H1.4: Establish By-Right Housing Designation for Prior Housing Sites. Designate housing sites that have carried over from the prior Housing Element to allow housing development by-right consistent with State law.

Quantified Objectives:

- Amend the Zoning Code to establish a "by-right" designation for housing sites reused from prior Housing Elements for housing projects that propose a minimum of 20% affordable units.

Geographic Target: Specific Sites

Implementation Timeline:

- Completed in January 2024.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H1.5: Facilitate Pipeline and Pending Projects. The City will facilitate and support pipeline and pending projects during the planning period by working with applicants to ensure reviews are done in a timely manner, providing technical assistance, and limiting public meetings as required by SB 330. As needed, the City will provide incentives or additional assistance like expediting project review, supporting funding applications, and working to avoid unnecessary delays in processing of the applications.

Quantified Objectives:

- For each housing project, maintain a designated project planner and engineer, as well as a senior manager from both the Community Development Department and Public Works Department to help facilitate the project and monitor progress.
- 1,023 units (including 194 very low-, 188 low-, 32 moderate-, and 609 above-moderate income units) constructed by end of planning period

Geographic Target: Citywide

Implementation Timeline:

- Ongoing

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

GOAL H2: PRESERVE EXISTING HOUSING THAT IS AFFORDABLE TO LOWER- AND MIDDLE-INCOME RESIDENTS.

As the City continues to grow, it remains important to maintain and preserve existing affordable housing as well as non-deed restricted housing that is naturally affordable for middle and lower-income households.

Policy H2.A: Continue to monitor, track, and encourage preservation of affordable housing at-risk of loss or conversion to market rate housing.

Policy H2.B: Continue partnering with housing service organizations to preserve existing affordable housing.

Policy H2.C: Invest funding into the purchase and preservation of affordable housing.

Program H2.1: Support Retention of Existing Lower-Income Units. Preserve "at-risk" affordable units through monitoring and partnering, working with nonprofits, and exploring available funding sources to preserve affordability. This activity will include both units in all affordable developments with expiring deed restrictions, as well as potential BMR units that are reaching the end of the term.

Quantified Objectives:

- Advertise units going to sale to nonprofits.
- Outreach and negotiate with owners for affordability extensions.
- Provide tenant education and affirmatively market available units to affected tenants.
- Objective: 106 units over the cycle.

Geographic Target: Citywide

Implementation Timeline:

- Annually, at the time of APR preparation, review the list of potentially at-risk units within the next ten years. In addition, in Q1, reach out to any owners regarding potential affordability extensions. Assist in the provision of tenant education by owners and nonprofit stakeholders. Liaise with nonprofits in Q2 to update them on potential acquisition opportunities. Ensure compliance with State Preservation Notice Law.
- In Q1 2025, draft preferences for any new affordable projects for displaced tenants in at-risk properties. Bring recommended language to CC for adoption in Q4 2025 and implement in Q1 2026.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H2.2: Manage Portfolio of Deed Restricted Affordable Units. The City will formalize its method of managing the City's deed restricted units by identifying a service provider or developing additional staff capacity.

Quantified Objective:

- Review best practices and evaluate staff resources to manage the portfolio of units. Make a determination on the best way to manage the units.
- If the outside provider approach is selected, develop a Request for Proposals to distribute to Bay Area service providers to manage existing and new affordable units, both for sale and rental; select a provider and begin transitioning this work to the provider.

Geographic Target: Citywide

Implementation Timeline:

- In Q3 2024, conduct analysis and determine whether to proceed with a service provider or staff approach.
- If a service provider approach is selected, launch RFP in Q1 2025; select provider and implement program in Q4 2025.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H2.3: Require Replacement Units. Adopt a policy requiring replacement units subject to the requirements of Government Code Section 65915 (c)(3) when new development occurs on a housing inventory site which currently has or within the past five years had residential uses (existing, vacated or demolished) and was legally restricted to low-income households, or subject to price control, or occupied by low-income households. Require that demolition permits include an assessment of rents to determine income status and plan to replace lost lower-income units.

Quantified Objectives:

- Adopt a policy requiring new housing development to replace all affordable housing units lost due to new development on site, at equal or greater levels of affordability.

Geographic Target: Citywide

Implementation Timeline:

- Conduct best practices review beginning in Q1 2025 on replacement options that would extend past 2034, including conferring with neighboring jurisdictions interested in the same outcomes; bring recommendations to City Council in Q3 2025 and implement approved policy in Q4 2025.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H2.4: Rehabilitation of Existing Housing Occupied by Lower-Income Households. The City will partner with and provide financial assistance, outreach, or resources to support housing service organizations and/or non-profit organizations that help preserve existing housing that is affordable to lower-income residents by providing home repairs and energy-efficiency improvements for low-income households.

Quantified Objectives:

- Establish partnerships with organizations that provide repair and energy-efficiency improvements for properties occupied by low-income residents, such as Peninsula Clean Energy, El Concilio of San Mateo County, and Rebuilding Together Peninsula, and explore opportunities to increase their reach in Belmont through enhanced financial assistance and targeted outreach to lower-income households.
- Continue to coordinate with housing service providers, non-profit housing developers, and affordable housing property managers to support their rehabilitation efforts.
- 20 units occupied by low-income households over the cycle will undergo energy-efficiency improvements or home repairs.

Geographic Target: Citywide

Implementation Timeline:

- Outreach to housing service providers bi-annually to confer on resources available and opportunities for partnerships, beginning in Q4 2024.

Responsible Body: Housing Division

Funding Source(s): Affordable Housing Funds

Program H2.5: Preserve Existing Affordable Units. Develop a plan to preserve the City's affordable units that will expire in the next decade to keep them affordable long term.

Quantified Objectives:

- Work with property owners of existing assisted housing developments for lower-income households and partner with nonprofits to determine methods to extend affordability covenants to preserve affordable units, including assistance from the City.
- Conduct best practices research on other jurisdictions' programs and prepare recommendations to City Council.

Geographic Target: Citywide

AFFH Action Area: Protect existing residents from displacement

Implementation Timeline:

- Conduct best practices work in Q3 2025; bring recommendations to Council in the Q1 2026; implement program by mid-2026.

Responsible Body: Housing Division

Funding Source(s): Affordable Housing Funds

GOAL H3: PROMOTE ACCESS TO HOUSING OPPORTUNITIES FOR LOW-INCOME HOUSEHOLDS AND PERSONS WITH SPECIAL HOUSING NEEDS.

The city can improve access to housing for all income groups and special needs communities by providing education and information on specific programs and affordable housing opportunities offered locally, regionally, and by the state.

Policy H3.A: Increase access to homeownership opportunities for lower income households.

Policy H3.B: Increase access and awareness of housing programs and affordable housing unit availability through use of new technology as part of a robust and proactive public outreach strategy.

Program H3.1: Home Ownership Financing. Support access to home ownership opportunities and connect potential homeowners to financing sources specifically targeted to first time homebuyers or affordable housing units.

Quantified Objective:

- Partner with housing organizations and financing stakeholders to host at least one first time homebuyer workshop in Belmont during the planning period.

Geographic Target: Citywide

Implementation Timeline:

- In Q3 2025 and every three years after, partner with stakeholders, including HEART, to offer first time homebuyer workshops in Belmont.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H3.2: Continue to Participate in Countywide Below Market Rate Unit Web Portal. San Mateo County and multiple other jurisdictions collaborate on a web portal that includes affordable housing units available for rent, online applications, and access to the waitlist for future units.

Quantified Objective:

- Support the County in maintaining online portal for a BMR applications and waitlist.
- Promote the County's online portal through the City's website.
- Modify developer agreements when appropriate to require developers to use the Countywide portal.

Geographic Target: Citywide

Implementation Timeline: Ongoing as projects complete construction

Responsible Body: Housing Division and San Mateo County

Funding Source(s): Housing Division Budget

GOAL H4: REMOVAL OF CONSTRAINTS OF THE PRODUCTION OF HOUSING.

The city can further the production of housing to meet RHNA goals by eliminating governmental policies or regulations that unnecessarily constrain the development or improvement of market-rate or affordable housing.

Policy H4.A: Periodically review and update the Zoning Ordinance to remove language that constrains development and stay abreast of updates to State law to reduce constraints to emergency shelters, low barrier navigation centers, supportive housing, and group homes.

Policy H4.B: Reduce constraints to housing development by increasing floor area ratios and density, waiving lot consolidation permit fees, and reducing parking requirements.

Policy H4.C: Provide clear and transparent information on the City's website regarding development standards, the development review process, and associated fees.

Program H4.1: Update Zoning Code to Increase Floor Area Ratios and Density. Modify the Zoning Ordinance to allow for increased floor area ratios and density to better facilitate development projects.

Quantified Objectives:

- Modify the Corridor Mixed Use (CMU) zoning district to increase the maximum allowed Floor Area Ratio (FAR) from 1.75 (2.2 with community benefits) to 2.0 (2.5 with community benefits), and to eliminate the maximum residential density metric.
- Modify the Village Station Core (VSC) zoning district to increase the maximum allowed FAR from 1.5 (2.0 with community benefits) to 2.0 (2.5 with community benefits).

Geographic Target: CMU and VSC districts

Implementation Timeline:

- Completed in January 2024

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H4.2: Zoning Code Amendments to Remove Constraints. The City will annually review, and amend as necessary, the Zoning Code to ensure consistency with State Housing Government Code requirements and remove or lessen constraints on new housing development, pertaining to, but not limited to:

- **Emergency Shelters:** Ensure full compliance with State laws pertaining to housing for homeless persons, including removing the following constraints:
  1. Define emergency shelters to include associated uses such as low barrier navigation centers, bridge housing, respite/recuperative care, and other inclusive terms for shelters.
  2. Update parking requirements to comply with AB139/Government Code section 65583, subdivision (a)(4)(A), AB 2339, and any other parking requirements.
  3. Increase the maximum number of beds allowed by-right in the S-2 Combining District to 20, with a commitment to review this limit in 2027 based on updated homeless population counts to determine if the limit should be increased.

- **Permanent Supportive Housing.** Amend the Zoning Code to ensure consistency with AB 2162 by allowing by-right 100% affordable housing that has 25% or 12 units of permanent supportive housing, where multi-family or mixed-use housing is permitted.
- **Transitional and Supportive Housing.** Amend the Zoning Code to permit transitional housing and supportive housing as a residential use in all zones allowing residential uses and only subject to those restrictions that apply to other residential dwellings of the same type in the same zone. (Gov. Code, Section 65583, subd. (c)(3).)
- **Low-Barrier Navigation Centers:** Amend the Zoning Code to allow low-barrier navigation centers for the homeless by right in zones that allow for mixed-use and nonresidential zones permitting multi-family uses, per Government Code Section 65662.
- **Density Bonus:** Comply with changes in California's density bonus law (Government Code Section 65915, as revised) and promote the density bonus through the City website and/or informational brochures that will be displayed at the City's Permit Center.
- **Residential Care Facilities:** Amend the Zoning Code to ensure definition of residential care facilities and small residential care facilities continue to comply with State law, and amend the zoning code to eliminate the requirement for a use permit for care facilities of seven or more persons with a disability, and allow them in all zones allowing residential uses based on objective criteria to facilitate approval certainty, except in areas where this conflicts with the San Carlos Airport Land Use Plan.
- **Reasonable Accommodation:** Amend the Zoning Code to ensure certainty and eliminate discretionary review.
- **Definition of Family**: Amend the Zoning Code definition of "Family" to remove the reference to "internally structured relationship" and instead define a family as one or more persons living together in a dwelling unit, with common access to, and common use of all living, kitchen, and eating areas within the dwelling unit.
- **Mobile Homes:** Amend the Zoning Code to allow mobile home parks as a special use in all residential zones, consistent with Government Code Section 65852.7.
- **Farmworker Housing:** Amend the Zoning Code to define "farmworker housing" and allow it within the districts to be determined, consistent with State requirements.

Quantified Objectives:

- Adopt Zoning Code amendments.

Geographic Target: Citywide

Implementation Timeline:

- Amend the Zoning Code by Q4 2024.
- Review State Density Bonus law annually and update Zoning Code within 6 months of review, as needed.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H4.3: Lot Consolidation Fee Waivers. Waive the permit fees for subdivisions actions to consolidate lots for housing development projects with at least 20% very low- and/or extremely low-income units.

Quantified Objectives:

- Bring proposal to City Council to waive lot consolidation permit fees for developments with at least 20% very low- and/or extremely low-income units.

Geographic Target: Citywide

Implementation Timeline:

- City Council review draft policy in Q3 2026. Adopt policy in Q4 2026.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H4.4: Reduce Parking Requirements. Reduce parking requirements in certain residential zoning districts.

Quantified Objectives:

- The City will modify the parking requirements in the R-2, R-3, and R-4 zoning districts to reduce parking requirements consistent with other multi-family zoning districts (CMU, RC, Village Districts). It should also be noted that since January 2023, Assembly Bill 2097 has prohibited all Cities from enforcing minimum parking standards on properties within one half mile of public transit. A large majority of R-2, R-3, and R-4 properties are located within one half mile of public transit and will not be subject to minimum parking standards.

Geographic Target: R-2, R-3, and R-4 zoning districts

Implementation Timeline:

- Beginning in Q1 2025, develop code amendments to reduce parking requirements in the R-2, R-3 and R-4 zoning districts to be consistent with other multi-family zoning districts.
- Bring recommended changes to PC in Q4 2025 and to CC in Q1 2026 for approval. Implement in Q2 2026.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H4.5: Evaluation of Zoning Constraints. While the City's development standards have proven to not be a constraint to housing development in recent years, it is important to continue to evaluate their effectiveness during the planning period. The City will monitor and analyze the interrelationship between the zoning standards, objective design standards, and State Density Bonus to identify and remove constraints to housing development. In addition, the City will conduct a peer agencies evaluation of zoning standards such as height and open space requirements as part of the analysis.

Quantified Objectives:

- Maintain a list of housing applications and use of State Density Bonus law with particular attention to what concessions/incentives and waivers developers are requesting.
- Monitor how developers are applying the City's Objective Design Standards and track feedback from developers on any standards that are difficult to implement.
- Monitor applications for Conditional Use Permits for ground floor residential to determine if the current provisions are appropriate to maintain the City's goal of supplying commercial uses to serve the growing residential population and are not a barrier to housing development.
- Conduct a review of peer cities to confirm that Belmont's zoning standards are in line with other cities that support diverse housing opportunities. The review will also include consulting and considering feedback from local and regional market rate and affordable housing developers.
- If the resulting analysis identifies opportunity to remove additional constraints, complete zoning code amendments to remove those constraints.

Geographic Target: Citywide in zoning districts that allow multi-family housing

Implementation Timeline:

- Ongoing from 2024-2031, maintain list of how Density Bonus is applied, feedback from developers on feasibility of the adopted Objective Design Standards, and applications for Conditional Use Permits for ground floor residential uses.
- Peer agency and developer evaluation completed in Q4 2026.
- If zoning amendments are necessary to remove constraints, adopt by Q2 2027.

Responsible Body: Planning Division

Funding Source(s): Community Development Department Budget

Program H4.6: Update the City's Webpage to Provide Enhanced Information for Housing Developers. Provide a clear summary of procedures, development standards, and fees for housing development on the Community Development webpage.

Quantified Objectives:

- Create and maintain a developer resources page to make it easier to navigate the City's development process; include updated development and impact fees consistent with State law.
- Prepare written procedures for SB 35 projects. Update the City's website with information and resources for SB 35 streamlined ministerial review, including providing a Notice of Intent form.

Geographic Target: Citywide

Implementation Timeline:

- Update the City's website annually in Starting in Q2 2024 to provide transparency on development fees, standards, and SB 35 streamlining.

Responsible Body: Planning Divisions

Funding Source(s): Community Development Department Budget

Program H4.7: Monitor Commercial Development in Mixed-Use Districts. The City will continue monitoring commercial development in mixed-use districts and if the City find that the trends are shifting or incentivizing 100% commercial, the City will review and take action as necessary.

Quantified Objectives:

- Maintain a list of development applications in Commercial Mixed-Use districts with particular attention to whether or not commercial development is being proposed as a mixed-use or as a stand-alone use.
- Analyze whether zoning amendments or other development incentives are needed to encourage residential development in these zones and implement changes within one year of shift in development trends towards 100% commercial projects.

Geographic Target: Commercial Mixed-Use Districts

Implementation Timeline:

- Analyze development trends on an annual basis starting in Q4 2024. If changes are needed, implement and/or adopt within one year of shift in development trends towards 100% commercial projects

Responsible Body: Community Development Department

Funding Source(s): Community Development Department Budget

GOAL H5: PROMOTE FAIR HOUSING ACCESS AND EQUAL OPPORTUNITIES FOR ALL PERSONS (SEE FAIR HOUSING ACTION PLAN IN CHAPTER 3, AFFH SUMMARY).

AFFH policies and programs increase the variety of housing types geographically distributed throughout the city, prevent displacement of low-income communities of color, and address identified fair housing issues to foster an inclusive community.

Policy H5.A: Increase awareness of and support the enforcement of laws and regulations prohibiting discrimination in lending practices and in the sale or rental of housing.

Policy H5.B: Increase available financial resources for affordable housing in order to better fund efforts to foster stable residential integration and increased access to opportunity. Increase integration by increasing the supply of affordable housing for families in higher opportunity areas.

Policy H5.C: Improve communications and coordination between jurisdictions, service providers, and agencies in the County.

Policy H5.D: Reduce the displacement of low-income communities of color by enhancing protections for vulnerable tenants and homeowners.

Policy H5.E: Continue to support local programs with a proven track record of assisting Belmont residents and workers to find housing.

Policy H5.F: Encourage housing development on properties with religious institutions and educational uses.

Policy H5.G: Increase the production of a variety of housing types in single-family neighborhoods throughout the City.

Policy H5.H: Strengthen ADU and SB9 Monitoring and Outreach Programs to encourage units with a demographic range of occupants.

> **Program H5.1: Update Website to Improve Access to Fair Housing Information and Housing Services.** Increase community outreach and availability of fair housing resources and other housing services in multiple languages through the City's Housing webpage. Advertise two existing HIP Housing programs with a track record of assisting Belmont residents and workers: 1) The *Self Sufficiency Program* provides subsidized rent and support services to low-income parents or emancipated foster youth who are in school to increase their earning power and become financially self-sufficient within 1-5 years; and 2) The *Housing Readiness Program* supports people who contact HIP to help them become more "housing ready" including housing resources, assistance completing housing applications, and offering activities that help prepare people to access housing.

Quantified Objectives:

- Maintain and improve webpage with comprehensive housing related information and materials for low-income households seeking housing opportunities, and coordinate with providers to market programs electronically.
- Provide an easy way for residents and property owners to find information on fair housing laws, rights, and responses (e.g., filing a complaint and ensuring property owners do not violate fair housing laws) on the City's website.
- Provide information in multiple languages.
- Conduct a best practices review of other jurisdictions' websites. Update Belmont's website to contain fair housing resources and information on how to connect with housing services.
- Update website quarterly and promote through City newsletter.
- On an annual basis, maintain an average of two families in the *Self Sufficiency Program*, and two households in the *Housing Readiness Program*.

Implementation Timeline:

- Complete best practices review by Q1 2025; complete website update by Q2 2025, update quarterly thereafter.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H5.2: Coordinate with other jurisdictions and agencies in the County to advance AFFH goals. San Mateo County has a proven track record of collaboration between jurisdictions. As cities move towards more active efforts to further fair housing, there are new opportunities to collaborate.

Quantified Objectives:

- Attend regular meetings with 21 Elements (with planners and housing staff), 21 Directors (with Community Development Directors) and Housing Managers group.
- Collaborate with peer jurisdictions to implement Housing Element Programs that would benefit from efficiencies of scale.

Implementation Timeline:

- Attend meetings as scheduled, typically every other month for each group.

Responsible Body: Planning and Housing Divisions

Funding Source(s): Housing Division Budget

Program H5.3: Modify the Inclusionary Housing Program. Adjust the City's Below Market Rate (Inclusionary) Program to provide pathways for the construction of

affordable units that address the needs of residents with extremely low and very low incomes who face very high rates of cost burden in the city.

Quantified Objectives:

- Expand the variety of housing units produced under the inclusionary housing program.
- Perform a feasibility analysis to redesign the program to allow a menu of options to produce units at different below market income levels.

Geographic Target: Citywide

Implementation Timeline:

- Complete feasibility analysis by Q4 2025; adopt redesigned program by Q1 2026.

Responsible Body: Planning and Housing Divisions

Funding Source(s): Community Development Budget

Program H5.4: Work with Housing Developers to Affirmatively Market Housing to Households with Disproportionate Housing Needs. The City actively supports collaboration between the private sector and service providers to connect persons in need of housing with new housing opportunities. Special attention will be paid to Black and Hispanic households that are more cost burdened and persons with disabilities.

Quantified Objectives:

- Establish a list of community service providers to distribute to developers of affordable housing.
- Coordinate with developers to ensure organizations are notified when new affordable housing becomes available.
- Partner service provider agencies to receive and respond to 30 intake calls per year from Belmont residents.
- Require developer agreements and affordable housing agreements to require affirmative marketing of below market rate units to households with higher needs.
- Require developers to affirmatively market approximately 640 very low-income and low-income housing units (based on the number of units anticipated to be constructed during the 8-year planning period, excluding those already completed as of May 2024) to households with disproportionate housing needs.
- Target 15% of below market rate units to be occupied by households with disproportionate housing needs.

Geographic Target: All projects that include affordable units.

Implementation Timeline:

- Establish list of service providers by Q4 2024 and update annually thereafter.

- Ongoing as projects are processed, review developer marketing plans to ensure affirmative marketing is included.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H5.5: Provide Fair Housing Training for Landlords and Tenants. Partner with Project Sentinel to provide training with a focus on tenant's rights, race-based discrimination, and reasonable accommodations.

Quantified Objectives:

- Increase awareness of fair housing laws and tenants' rights to reduce unlawful discrimination and displacement.
- Partner with Project Sentinel to provide training every two years. Market training through direct outreach to landlords and through local service providers to reach tenants and enroll 10 residents in each training.
- Conduct a City Council study session on fair housing laws and available resources and notify at least 10 large multifamily property owners and five service providers to encourage participation in the meeting.

Geographic Target: Citywide

Implementation Timeline:

- Ongoing annual check in with Project Sentinel.
- Provide training in 2025 and every two years thereafter.
- Conduct a City Council study session in Q3 2025.

Responsible Body: Housing Division, Project Sentinel

Funding Source(s): Housing Division Budget

Program H5.6: Expand Tenant Protections. The City will extend tenant protections to address displacement and relocation costs.

Quantified Objectives:

- Extend AB1482 provisions to require tenant relocation payments for No Fault evictions for those with tenure less than one year.
- Explore tenant protection policies that require documentation from landlords who use substantial remodel exemption to evict tenants.
- Establish Right to Return policy for tenants displaced from homes due to demolition or substantial remodels.
- Conduct proactive outreach to tenants and tenant groups and engage with 30 rental households a year on tenant protection policies and available resources.

Geographic Target: Citywide

Implementation Timeline:

- In Q4 2025, draft extended tenant protections provisions and research policy provisions for substantial remodel exemptions and right of return policies. Bring recommended language to City Council in Q1 2026.
- Conduct proactive outreach to tenants and tenant groups bi-annually.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H5.7: Continue Financial Support of Existing Home Sharing Program. The City will continue to provide financial support for the HIP Housing *Home Sharing Program* that matches individuals seeking housing with people who have a room or ADU to rent.

Quantified Objectives:

- Provide financial support each fiscal year through 2031 in the amount of $5,000.
- Meet annually with HIP staff to discuss outreach methods and opportunities to reach underserved populations.
- On an annual basis, maintain an average of eight (8) households in a Home Sharing match.
- Match three (3) new residents per year with a housemate.

Geographic Target: Citywide, with an emphasis in low-density neighborhoods.

Implementation Timeline:

- City will grant funding as part of annual budget process.
- Meet with HIP Housing within one year of Housing Element Certification and annually thereafter.

Responsible Body: Housing Division

Funding Source(s): Housing Division Budget

Program H5.8: Facilitate Development of Housing on Institutional Properties. Conduct direct outreach and provide technical assistance to religious institutions and private schools to encourage development of housing on their sites.

Quantified Objectives:

- Conduct direct outreach to religious institution site owners or operators to inform them about SB4 (California Government Code Section 65913.16) that allows by-right processing of certain affordable housing projects and any other regulations that encourage housing development on these sites.

- Conduct direct outreach to site owners or operators of private schools to discuss the feasibility of developing housing on their sites.
- Provide technical assistance to religious and educational institutions including offering meetings, assigning a dedicated planner, assisting with development feasibility studies, and connecting institutions with potential developers or design professionals to help expedite the process. As appropriate provide incentives for development such as streamlined review and financial assistance for affordable projects.

Geographic Target: Specific sites citywide with an emphasis in low-density neighborhoods.

Implementation Timeline:

- Reach out to each religious institution site owner or operator within one year following Housing Element certification and annually thereafter.
- Provide mailed notifications to religious institutions within six months of the adoption of any new State legislation that reduces barriers to development of religious institution sites.
- Reach out to each private school site owner or operator within one year following Housing Element certification and annually thereafter.

Responsible Body: Housing and Planning Divisions

Funding Source(s): Housing Division Budget and Affordable Housing Fund

Program H5.9: Amend Zoning Code to Facilitate Production of ADUs and SB9 units. Adopt zoning code amendments to facilitate production of additional ADUs and SB9 units in single-family neighborhoods.

Quantified Objectives:

- Complete zoning ordinance amendments to allow ADUs and SB9 units up to 1,200 square feet on single-family properties 10,000 square feet or greater. This would complement State law by allowing larger ADUs on larger properties spread throughout the city.
- Complete zoning ordinance amendments to allow all properties zoned single-family to convert from one unit to two units within the existing building envelope through a ministerial process. This would complement SB9 law by allowing greater flexibility in unit sizes. SB9 captures the division of existing homes to two units up to 800 square feet per unit. This program would allow any existing home to be divided into a duplex, regardless of the unit sizes. The property owner would also be allowed to build an ADU and JADU (for a total of 4 units).

Geographic Target: Citywide, with an emphasis in low-density neighborhoods.

Implementation Timeline:

- Complete zoning ordinance amendments and establish policies and procedures to facilitate these types of projects within one year following Housing Element Certification.

Responsible Body: Community Development Department

Funding Source(s): Community Development Department Budget

Program H5.10: Provide Financial Support for ADUs that Serve Lower-Income Households. Establish a grant or loan program to support low-income homeowners to construct ADUs or incentivize homeowners to construct ADUs affordable to lower income households.

Quantified Objectives:

- Analyze best practices for establishing an effective grant or loan program for ADUs.
- Participate in Countywide ADU Resource Center process for developing a loan/grant program and determine whether Countywide program meets the City's needs and objectives.
- Finalize program and conduct outreach through the City website and newsletter, as well as local service providers.
- Target five grants/loans for five households during the planning period. Target special needs populations such as seniors, persons with disabilities, and large households.

Geographic Target: Citywide, with an emphasis in low-density neighborhoods.

Implementation Timeline:

- Participate in Countywide process in 2024.
- Establish a grant or loan program by Q4 2025.

Responsible Body: Housing Division

Funding Source(s): Affordable Housing Fund

Program H5.11: Conduct Outreach to Encourage ADU and SB9 Unit Production. Strengthen ADU and SB9 outreach programs to encourage a range of unit sizes, with a demographic range of occupants, that are geographically dispersed throughout the city.

Quantified Objectives:

- Perform analysis and identify areas of the city with the highest potential for the addition of ADUs and JADUs due to sloping lots that create underfloor area prime for conversion to living area. Conduct direct outreach to those property owners and provide technical assistance. Target special needs populations such as seniors, developmentally disabled, and large households.

- Establish an online plans gallery to allow property owners to access pre-reviewed ADU plans that can be downloaded for free or purchased from the designer. Homeowners will be able to search for specific types and sizes of ADUs to meet a variety of needs.
- Participate in Countywide ADU Resource Center to facilitate coordinated, high-quality outreach and technical assistance.
- Create high-quality outreach materials including website updates, handouts, FAQs and application forms. Include materials targeted toward homeowners, rather than just design professionals.
- Conduct annual outreach to all ADU/JADU/SB9 property owners with HIP Housing information to encourage rental to a range of households (not just friends and family).

Geographic Target: Citywide, with an emphasis in low-density neighborhoods

Implementation Timeline:

- Conduct analysis and outreach related to units on sloped sites in Q2 2025.
- Join ADU Resource Center and launch online plans gallery in Q3 2024.
- Create new outreach materials in Q1 2025.
- Conduct outreach to all ADU/JADU/SB9 owners within 9 months of Housing Element Certification and annually thereafter.

Responsible Body: Community Development Department

Funding Source(s): Community Development Department Budget

Program H5.12: Create an AFFH Monitoring Program. Create an AFFH Monitoring Program to encourage units with a demographic range of occupants that are geographically dispersed throughout the city.

Quantified Objectives:

- The City hopes to achieve 120 units (above the RHNA) of which 50% would be low and moderate income through Housing Mobility Programs H5.3, H5.8, H5.9, H5.10, H5.11, and H5.12.
- Create a master list of all ADUs, JADUs, and SB9 units and map them to allow monitoring of their location throughout the city.
- Establish an ADU monitoring and reporting program, including mapping of location in the city, progress on ADU production, affordability, and geographical distribution.
- Monitor the distribution of ADUs and SB9 units. If ADUs and SB9 units are concentrated in certain areas of the city, analyze constraints and adjust outreach techniques to encourage distributed units.

- Assess by mid-cycle (2027) if ADU and JADU production is meeting the City's 6th cycle RHNA goals. If not, consider additional efforts such as reducing process and permitting fees to incentivize production. If trends indicate a potential substantial shortfall in meeting the estimated ADUs in the sites inventory, consider additional efforts to incentivize ADU production and reassess and revise the overall sites strategy for the RHNA by 2027 through adjusting ADU capacity assumptions with actual permitted units, and/or identifying additional sites for consideration to expand site capacity to the extent necessary to accommodate the RHNA.

Geographic Target: Citywide, with an emphasis in low-density neighborhoods.

Implementation Timeline:

- Create a list and map of existing ADUs, JADUs and SB9 units within six months of Housing Element adoption.
- Participate in regional process to establish an ADU monitoring program on timing they set forward.
- If ADU production does not meet target, consider additional efforts such as reducing process and permitting fees to incentivize production in 2027.

Responsible Body: Community Development Department

Funding Source(s): Community Development Department Budget

QUANTIFIED OBJECTIVES

The quantified objectives section estimates the number of units likely to be constructed, rehabilitated, or conserved/preserved by income level during the 2023-2031 planning period. The quantified objectives do not represent a ceiling on development, but rather set a target goal for the jurisdiction to achieve, based on needs, resources, and constraints.

According to HCD, the sum of the quantified objectives for the programs should ideally be equal to or surpass the community's identified housing needs. However, State law recognizes that the total housing needs identified may exceed available resources and the community's ability to satisfy this need within the context of the general plan. Under these circumstances, the quantified objectives need not match the identified existing housing needs but should establish the maximum number of housing units that can be constructed, rehabilitated, and conserved over an eight-year time frame. The quantified objectives do not necessarily meet the goals of RHNA because they are not a full projection of anticipated housing development within the Housing Element Cycle. It is an estimate of actual production, given available resources and projected pipelines projects.

With respect to affordable units, the City has estimated the potential subsidies available during the planning period and has calculated the potential number of units that could be developed using assistance from these funds. In addition, staff has compiled a list of known or expected

development projects that are anticipated to be completed within the next eight years. The City is not aware of any pending housing preservation or rehabilitation projects.

Based on residential building permits issued in the last year and residential projects that have been initially reviewed or approved by the Planning department that have not been built, the quantified objective for non-subsidized pending and pipeline projects in above-moderate-income projects is 606 units. The total quantified objectives for the 2023-2031 planning period are outlined in Table 7-1. Table 7-2 includes quantified objectives for housing production and how they align with the City's overall RHNA.

TABLE 7-1: QUANTIFIED OBJECTIVES FOR CYCLE 6 (2023 – 2031)

	ELI	VLI	LI	MOD	Above MOD	Total
Conservation	30	30	20	0	0	80
Rehabilitation	5	5	10	0	0	20
Preservation	0	0	104	2	0	106
Housing Production						
Housing Mobility Programs	10	10	40	60	0	120
Pipeline Projects Subsidized by the City	69	62	94	0	3	228
Other Pipeline Projects	0	0	81	0	484	565
Pending Projects	17	46	13	11	122	209
Housing Inventory Sites	126	126	154	186	484	1,076
Housing Inventory Sites Projected to be Subsidized by the City	35	35	30	0	0	100
Pipeline and Projected ADUs	0	0	0	111	0	111
Subtotal Housing Production Units	**257**	**279**	**412**	**368**	**1,093**	**2,409**
TOTAL	**292**	**314**	**546**	**370**	**1,093**	**2,615**

Source: City of Belmont, 2024.

TABLE 7-2: HOUSING PRODUCTION QUANTIFIED OBJECTIVES ALIGNMENT WITH BELMONT'S RHNA

Income Level	Housing Production Quantified Objective	Eight-Year RHNA Figure	% of RHNA to be Produced
Extremely and Very Low-Income	536	488	110%
Low-Income	412	281	147%
Moderate-Income	368	283	130%
Market Rate	1,093	733	149%
TOTAL	**2,409**	**1,785**	

Source: City of Belmont, 2024.

7.2 PROGRAM IMPLEMENTATION MATRIX

Table 7-3 includes the implementation timing for each proposed program.

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TABLE 7-3: PROGRAM IMPLEMENTATION MATRIX

Program	2024	2025	2026	2027	2028	2029	2030	2031
Program H1.1: Monitor Regional Housing Need Allocation. Monitor housing production against ABAG Fair Share Allocation in compliance with no net loss requirements during planning period. Monitor all housing unit production by all income categories.	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing
Program H1.2: Use Public Funding for Low/Moderate Income Housing. Use City affordable housing funds to produce additional affordable housing projects and to leverage other regional, state, and federal funding sources to support the construction of affordable housing.	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing
Program HI.3: Water and Sewer Providers. Ensure immediate delivery of the Housing Element to water and sewer providers to facilitate streamline reviews and ensure adequate capacity for housing projects.	▪ Deliver adopted Housing Element							
Program H1.4: Establish By-Right Housing Designation for Prior Housing Sites. Designate housing sites that have carried over from the prior Housing Element to allow housing development by-right consistent with State law.	▪ Completed in January							
Program H.1.5: Facilitate Pipeline and Pending Projects. The City will facilitate and support pipeline and pending projects during the planning period by working with applicants to ensure reviews are done in a timely manner, providing technical assistance, and limiting public meetings as required by SB 330. As needed, the City will provide incentives or additional assistance like expediting project review, supporting funding applications, and working to avoid unnecessary delays in processing of the applications.	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing
Program H2.1: Support Retention of Existing Lower-Income Units. Preserve "at-risk" affordable units through monitoring and partnering, working with nonprofits, and exploring available funding sources to preserve affordability. This activity will include both units in all affordable developments with expiring deed restrictions, as well as potential BMR units that are reaching the end of the term.	▪ Ongoing review of at-risk units and tenant education	▪ Annual review of at-risk units, possible affordability extensions, acquisition opportunities, and tenant education. ▪ Q1: Draft preferences for any new affordable projects for displaced tenants in at-risk properties ▪ Q4: Recommend preference language to CC for adoption	▪ Ongoing review of at-risk units and tenant education ▪ Q1: Implement preference policy.	▪ Ongoing review of at-risk units and tenant education	▪ Ongoing review of at-risk units and tenant education	▪ Ongoing review of at-risk units and tenant education	▪ Ongoing review of at-risk units and tenant education	▪ Ongoing review of at-risk units and tenant education
Program H2.2: Manage Portfolio of Deed Restricted Affordable Units. The City will formalize its method of managing the City's deed restricted units by identifying a service provider or developing additional staff capacity.	▪ Q3: Conduct analysis and determine whether to proceed with a service provider or staff approach.	▪ Q1: If a service provider approach is selected, launch RFP ▪ Q4: Select provider and implement program						
Program H2.3: Require Replacement Units. Adopt a policy requiring replacement units subject to the requirements of Government Code Section 65915 (c)(3) when new development occurs on a housing inventory site which currently has or within the past five years had residential uses (existing, vacated or demolished) and was legally restricted to low-income households, or subject to price control, or occupied by low-income households. Require that demolition permits include an assessment of rents to determine income status and plan to replace lost lower-income units.		▪ Q1: Conduct best practices review on replacement options that would extend past 2034 ▪ Q3: Bring recommendations to City Council ▪ Q4: implement approved policy.						

Program H2.4: Rehabilitation of Existing Housing Occupied by Lower-Income Households. The City will partner with and provide financial assistance, outreach, or resources to support housing service organizations and/or non-profit organizations that help preserve existing housing that is affordable to lower-income residents by providing home repairs and energy-efficiency improvements for low-income households.	▪ Q4: Outreach to housing service providers			▪ Q4: Outreach to housing service providers			▪ Q4: Outreach to housing service providers			▪ Q4: Outreach to housing service providers				
Program H2.5: Preserve Existing Affordable Units. Develop a plan to preserve the City's affordable units that will expire in the next decade to keep them affordable long term.		▪ Q3: Conduct best practices research		▪ Q1: Bring recommendations to Council beginning 2026 ▪ Q2-Q3: Implement program by mid-2026.										
Program H3.1: Home Ownership Financing. Support access to home ownership opportunities and connect potential homeowners to financing sources specifically targeted to first time homebuyers or affordable housing units.		▪ Q3: Offer first time homebuyer workshops					▪ Q3: Offer first time homebuyer workshops						▪ Q3: Offer first time homebuyer workshops	
Program H3.2: Continue to Participate in Countywide Below Market Rate Unit Web Portal. San Mateo County and multiple other jurisdictions collaborate on a web portal that includes affordable housing units available for rent, online applications, and access to the waitlist for future units.	▪ Ongoing	▪ Ongoing		▪ Ongoing	▪ Ongoing		▪ Ongoing	▪ Ongoing		▪ Ongoing			▪ Ongoing	
Program H4.1: Update Zoning Code to Increase Floor Area Ratios and Density. Modify the Zoning Ordinance to allow for increased floor area ratios and density to better facilitate development projects.	▪ Completed in January													
Program H4.2: Zoning Code Amendments to Remove Constraints. The City will annually review, and amend as necessary, the Zoning Code to ensure consistency with State Housing Government Code requirements and remove or lessen constraints on new housing development.	▪ Q4: Amend Zoning Code ▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed	▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed		▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed	▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed		▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed	▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed		▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed			▪ Review State Density Board law and update Zoning Code w/in 6 months of review, as needed	
Program H4.3: Lot Consolidation Fee Waivers. Waive the permit fees for subdivisions actions to consolidate lots for housing development projects with at least 20% very low- and/or extremely low-income units.				▪ Q3: City Council review draft policy ▪ Q4: Adopt policy										
Program H4.4: Reduce Parking Requirements. Reduce parking requirements in certain residential zoning districts.		▪ Q1: Develop code amendments to reduce parking requirements in the R-2, R-3 and R-4 zoning districts to be consistent with other multi-family zoning districts ▪ Q4: Bring recommended changes to PC		▪ Q1: Bring recommended changes to CC for approval ▪ Q2: Implement										
Program H4.5: Evaluation of Zoning Constraints. While the City's development standards have proven to not be a constraint to housing development in recent years, it is important to continue to evaluate their effectiveness during the planning period. The City will monitor and analyze the interrelationship between the zoning standards, objective design standards, and State Density Bonus to identify and remove constraints to housing development. In addition, the City will conduct a peer agencies evaluation of zoning standards such as height and open space requirements as part of the analysis.	▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards	▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards		▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards ▪ Q4: Peer agency and developer zoning standards evaluation completed	▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards ▪ Q2: Adopt zoning amendments, if needed to remove constraints		▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards	▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards		▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards		▪ Ongoing: Monitor use of density bonus and feasibility of Objective Design Standards	
Program H4.6: Update the City's Webpage to Provide Enhanced Information for Housing Developers. Provide a clear summary of procedures, development standards, and fees for housing development on the Community Development webpage.	▪ Q2: Update the City's website	▪ Q2: Update the City's website		▪ Q2: Update the City's website	▪ Q2: Update the City's website		▪ Q2: Update the City's website	▪ Q2: Update the City's website		▪ Q2: Update the City's website			▪ Q2: Update the City's website	

Program H4.7: Monitor Commercial Development in Mixed-Use Districts. The City will continue monitoring commercial development in mixed-use districts and if the City find that the trends are shifting or incentivizing 100% commercial, the City will review and take action as necessary.	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends	▪ Q4: Analyze development trends
Program H5.1: Update Website to Improve Access to Fair Housing Information and Housing Services. Increase community outreach and availability of fair housing resources and other housing services in multiple languages through the City's Housing webpage. Advertise two existing HIP Housing programs with a track record of assisting Belmont residents and workers: 1) The *Self Sufficiency Program* provides subsidized rent and support services to low-income parents or emancipated foster youth who are in school to increase their earning power and become financially self-sufficient within 1-5 years; and 2) The *Housing Readiness Program* supports people who contact HIP to help them become more "housing ready" including housing resources, assistance completing housing applications, and offering activities that help prepare people to access housing.		▪ Q1: Complete best practices review ▪ Q2: Complete website update, update quarterly thereafter	▪ Update website quarterly	▪ Update website quarterly	▪ Update website quarterly	▪ Update website quarterly	▪ Update website quarterly	▪ Update website quarterly
Program H5.2: Coordinate with other jurisdictions and agencies in the County to advance AFFH goals. San Mateo County has a proven track record of collaboration between jurisdictions. As cities move towards more active efforts to further fair housing, there are new opportunities to collaborate.	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing
Program H5.3: Modify the Inclusionary Housing Program. Adjust the City's Below Market Rate (Inclusionary) Program to provide pathways for the construction of affordable units that address the needs of residents with extremely low and very low incomes who face very high rates of cost burden in the city.		▪ Q4: Complete feasibility analysis	▪ Q1: Adopt redesigned program					
Program H5.4: Work with Housing Developers to Affirmatively Market Housing to Households with Disproportionate Housing Needs. The City actively supports collaboration between the private sector and service providers to connect persons in need of housing with new housing opportunities. Special attention will be paid to Black and Hispanic households that are more cost burdened and persons with disabilities.	▪ Q4: Establish list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included	▪ Q4: Review list of service providers ▪ Review developer marketing plans to ensure affirmative marketing is included
Program H5.5: Provide Fair Housing Training for Landlords and Tenants. Partner with Project Sentinel to provide training with a focus on tenant's rights, race-based discrimination, and reasonable accommodations.		▪ Provide training ▪ Q3: Provide a City Council Study Session on tenant's rights and available resources.		▪ Provide training		▪ Provide training		▪ Provide training
Program H5.6: Expand Tenant Protections. The City will extend tenant protections to address displacement and relocation costs.		▪ Q4: Draft extended tenant protections provisions and research policy provisions for substantial remodel exemptions and right of return policies ▪ Conduct proactive outreach to tenants and tenant groups	▪ Q1: Bring recommended tenant protection language to City Council	▪ Conduct proactive outreach to tenants and tenant groups		▪ Conduct proactive outreach to tenants and tenant groups		▪ Conduct proactive outreach to tenants and tenant groups bi-annually
Program H5.7: Continue Financial Support of Existing Home Sharing Program. The City will continue to provide financial support for the HIP Housing *Home Sharing Program* that matches individuals seeking housing with people who have a room or ADU to rent.	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing	▪ Ongoing
Program H5.8: Facilitate Development of Housing on Institutional Properties. Conduct direct outreach and provide technical assistance to religious institutions and private schools to encourage development of housing on their sites.		▪ Conduct annual outreach to religious/institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators	▪ Conduct annual outreach to religious/ institution site owners or operators

Program H5.9: Amend Zoning Code to Facilitate Production of ADUs and SB9 units. Adopt zoning code amendments to facilitate production of additional ADUs and SB9 units in single-family neighborhoods.		▪ Complete zoning ordinance amendments and establish policies and procedures to facilitate these types of projects							
Program H5.10: Provide Financial Support for ADUs that Serve Lower-Income Households. Establish a grant or loan program to support low-income homeowners to construct ADUs or incentivize homeowners to construct ADUs affordable to lower income households.	▪ Participate in Countywide process	▪ Q4: Establish a grant or loan program							
Program H5.11: Conduct Outreach to Encourage ADU and SB9 Unit Production. Strengthen ADU and SB9 outreach programs to encourage a range of unit sizes, with a demographic range of occupants, that are geographically dispersed throughout the city.	▪ Q3: Join ADU Resource Center and launch online plans gallery	▪ Q1: Create new outreach materials ▪ Q2: Conduct analysis and outreach related to units on sloped sites ▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	▪ Conduct outreach to all ADU/JADU/SB9 owners	
Program H5.12: Create an AFFH Monitoring Program. Create an AFFH Monitoring Program to encourage units with a demographic range of occupants that are geographically dispersed throughout the city.		▪ Q1: Create a list and map of existing ADUs, JADUs and SB9 units ▪ Participate in regional process to establish an ADU monitoring program		▪ If ADU production does not meet target, consider additional strategies					

APPENDIX A: NEEDS ANALYSIS

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1. Introduction

The Bay Area continues to see growth in both population and jobs, which means more housing of various types and sizes is needed to ensure that residents across all income levels, ages, and abilities have a place to call home. While the number of people drawn to the region over the past 30 years has steadily increased, housing production has stalled, contributing to the housing shortage that communities are experiencing today. In many cities, this has resulted in residents being priced out, increased traffic congestion caused by longer commutes, and fewer people across incomes being able to purchase homes or meet surging rents.

The 2023-2031 Housing Element update provides a roadmap for how to meet local growth and housing challenges. Required by the state, the Housing Element identifies existing housing conditions and community, reiterates housing goals, and creates a plan for housing creation. The Housing Element is an integral part of the General Plan, which guides the policies of the City of Belmont.

2. KEY STATISTICS

- **Population** – Generally, the population of the Bay Area continues to grow due to natural growth as well as a strong economy that draws new residents to the region. The population of Belmont increased by 6.7% from 2000 to 2020, which is below the growth rate of the Bay Area as a whole.
- **Age** – In 2019, Belmont's youth population under the age of 18 was 6,233 and its senior population 65 and older was 4,538. These age groups represent 23.0% and 16.7%, respectively, of Belmont's population.
- **Race/Ethnicity** – In 2020, 53.9% of Belmont's population was White, 1.0% was African American, 28.3% was Asian, and 12.1% was Latinx. People of color in Belmont comprise a proportion below the proportion in the Bay Area as a whole.[1]
- **Employment** – Belmont residents most commonly work in the *Financial & Professional Services* industry. From January 2010 to January 2021, the unemployment rate in Belmont decreased by 3.0%. Since 2010, the number of jobs located in the jurisdiction increased by 560 (9.5%). Additionally, the jobs-household ratio in Belmont decreased from 0.75 in 2002 to 0.62 in 2018.
- **Number of Homes** – The number of new homes built in the Bay Area has not kept pace with the demand, resulting in longer commutes, increasing prices, and exacerbating issues of displacement and homelessness. From 2010 to 2020, the number of homes in Belmont increased by 0.6%, which is below the growth rate for San Mateo County and below the growth rate of the region's housing stock at this time.
- **Home Prices** – A diversity of homes at all income levels creates opportunities for all Belmont residents to live and thrive in the community.
  - *Ownership* – The largest proportion of homes had a value in the range of $1M to $2M in 2019. Home prices increased by 123.6% from 2010 to 2020.
  - *Rental Prices* – In 2019, the typical contract rent for an apartment in Belmont was $2,250. From 2009 to 2019, rental prices increased by 76.8%. To rent a typical apartment without cost burden, a household would need to make $90,040 per year.[2]
- **Housing Type** – It is important to have a variety of housing types to meet the current and future needs of the community. In 2020, 58.0% of Belmont homes were single-family

[1] The Census Bureau's American Community Survey accounts for ethnic origin separate from racial identity. The numbers reported here use an accounting of both such that the racial categories are shown exclusive of Latinx status, to allow for an accounting of the Latinx population regardless of racial identity. The term Hispanic has historically been used to describe people from numerous Central American, South American, and Caribbean countries. In recent years, the term Latino or Latinx has become preferred. This report generally uses Latinx, but occasionally when discussing US Census data, we use Hispanic or Non-Hispanic, to clearly link to the data source.

[2] Note that contract rents may differ significantly from, and often being lower than, current listing prices.

detached, 6.0% were single-family attached, 3.1% were small multi-family (2-4 units), and 32.9% were medium or large multi-family (5+ units). From 2010 to 2020, the number of single-family units increased more than the number of multi-family units. Generally, the share of the housing stock that is detached single-family homes is above that of other jurisdictions in the region.

- **Cost Burden** – The U.S. Department of Housing and Urban Development considers housing to be affordable for a household if the household spends less than 30% of its income on housing costs. A household is considered "cost-burdened" if it spends more than 30% of its monthly income on housing costs, while those who spend more than 50% of their income on housing costs are considered "severely cost-burdened." In Belmont, 18.1% of households are cost-burdened, while 15.0% are severely cost-burdened.
- **Displacement/Gentrification** – According to research from The University of California, Berkeley, no households in Belmont live in neighborhoods that are susceptible to or experiencing displacement, and none live in areas at risk of or undergoing gentrification. In Belmont, 45.5% of households live in neighborhoods where low-income households are likely excluded due to prohibitive housing costs. There are various ways to address displacement including ensuring new housing is built at all income levels.
- **Neighborhood** – In Belmont, 100.0% of residents live in neighborhoods identified as "highest resource" or "high resource" by State-commissioned research. By comparison, 0.0% of residents live in areas identified by this research as "low resource" or "high segregation and poverty." These neighborhood designations are based on a range of indicators such as education, poverty, proximity to jobs and economic opportunities, low pollution levels, and other factors.[3]
- **Special Housing Needs** – Some population groups may have special housing needs that require specific program responses, and these groups may experience barriers to accessing stable housing due to their specific housing circumstances. In Belmont, 9.0% of residents have a disability of any kind and may require accessible housing. Additionally, 5.2% of Belmont households are larger households with five or more people, likely needing larger housing units with three bedrooms or more, while 6.7% of households are female-headed families, which are often at a greater risk of housing insecurity.

[3] For more information on the "opportunity area" categories developed by HCD and the California Tax Credit Allocation Committee, see this website: https://www.treasurer.ca.gov/ctcac/opportunity.asp. The degree to which different jurisdictions and neighborhoods have access to opportunity will likely need to be analyzed as part of new Housing Element requirements related to affirmatively furthering fair housing. ABAG/MTC will be providing jurisdictions with technical assistance on this topic this summer, following the release of additional guidance from HCD.

NOTE ON DATA

Many of the tables in this report are sourced from data from the Census Bureau's American Community Survey or U.S. Department of Housing and Urban Development's Comprehensive Housing Affordability Strategy (CHAS) data, both of which are samples and as such, are subject to sampling variability. This means that data is an estimate, and that other estimates could be possible if another set of respondents had been reached. We use the five-year release to get a larger data pool to minimize this "margin of error" but particularly for the smaller cities, the data will be based on fewer responses, and the information should be interpreted accordingly.

NOTE ON FIGURES

Any figure that does not specify geography in the figure name represents data for Belmont.

3. Looking to the Future: Regional Housing Needs

3.1 Regional Housing Needs Determination

The Plan Bay Area 2050[4] Final Blueprint forecasts that the nine-county San Francisco Bay Area will add 1.4 million new households between 2015 and 2050. For the eight-year time frame covered by this Housing Element Update, the Department of Housing and Community Development (HCD) has identified the region's housing need as 441,176 units. The total number of housing units assigned by HCD is separated into four income categories that cover housing types for all income levels, from very low-income households to market rate housing.

Every year, the US Department of Housing and Urban Development, in conjunction with the State of California, establish income categories based on the median income in each county. Based on new requirements for the completion of the Housing Element, jurisdictions must now report on the following income categories.

- Extremely Low-Income: 0-30% of Area Median Income, or AMI
- Very Low-Income: 30-50% AMI
- Low-Income: 50-80% AMI
- Moderate-Income: 80-120% AMI
- Above Moderate-Income: 120%+ AMI

Table 1 illustrates the income categories for San Mateo County in 2022. The median income for a family of four is $166,000.

The Regional Housing Needs Determination (RHND) is based on population projections produced by the California Department of Finance as well as adjustments that incorporate the region's existing housing needs. The adjustments result from recent legislation requiring HCD to apply additional adjustment factors to the baseline growth projection from California Department of Finance, for the regions to get closer to healthy housing markets. To this end, adjustments focus on the region's vacancy rate, level of overcrowding, and share of cost-burdened households, seeking to bring the region more in line with comparable ones.[5] These new laws governing the methodology for how HCD calculates the RHND resulted in a significantly higher number of housing units for which the Bay Area must plan compared to previous RHNA cycles.

[4] Plan Bay Area 2050 is a long-range plan charting the course for the future of the nine-county San Francisco Bay Area. It covers four key issues: the economy, the environment, housing and transportation

[5] For more information on HCD's RHND calculation for the Bay Area, see this letter sent to ABAG from HCD on June 9, 2020: https://www.hcd.ca.gov/community-development/housing-element/docs/abagrhna-final060920(r).pdf

TABLE 1: INCOME LIMITS FOR SAN MATEO COUNTY (2022)

Number of Persons in Household		1	2	3	4	5	6	7	8
San Mateo County Area Median Income: $166,000	Acutely Low-Income	$17,450	$19,900	$22,400	$24,900	$26,900	$28,900	$30,900	$32,850
	Extremely Low-Income	$39,150	$44,750	$50,350	$55,900	$60,400	$64,850	$69,350	$73,800
	Very Low-Income	$65,250	$74,600	$83,900	$93,200	$100,700	$108,150	$115,600	$123,050
	Low-Income	$104,400	$119,300	$134,200	$149,100	$161,050	$173,000	$184,900	$196,850
	Median Income	$116,200	$132,800	$149,400	166,000	$179,300	$192,550	$205,850	$219,100
	Moderate-Income	$139,450	$159,350	$179,300	$199,200	$215,150	$231,050	$247,000	$262,950

Source: State of California Department of Housing and Community Development, May 13, 2022, https://www.hcd.ca.gov/grants-funding/income-limits/state-and-federal-income-limits.shtml.

3.2 REGIONAL HOUSING NEEDS ALLOCATION

A starting point for the Housing Element update process for every California jurisdiction is the Regional Housing Needs Allocation (RHNA), which is also the share of the RHND assigned to each jurisdiction by the Association of Bay Area Governments (ABAG). State Housing Element Law requires that ABAG develop a methodology calculating the number of housing units assigned to each city and county and distribute each jurisdiction's housing unit allocation among four affordability levels. For this RHNA cycle, the RHND increased by 135%, from 187,990 to 441,776. For more information on the RHNA process this cycle, see ABAG's website: https://abag.ca.gov/our-work/housing/rhna-regional-housing-needs-allocation

Almost all Bay Area jurisdictions received a larger RHNA this cycle compared to the prior cycle, primarily due to changes in state law that led to a considerably higher RHND compared to previous cycles.

In January 2022, HCD approved ABAG's RHNA Methodology. For Belmont, the RHNA to be planned for this cycle is 1,785 units, a slated increase from the last cycle. The allocation Belmont received from the RHNA Methodology is broken down by income category as follows, including an estimate of the number of extremely low-income units needed.

TABLE 2: ILLUSTRATIVE REGIONAL HOUSING NEEDS ALLOCATION FROM DRAFT METHODOLOGY

Income Group	Belmont Units	San Mateo County Units	Bay Area Units	Belmont Percent	San Mateo County Percent	Bay Area Percent
Very Low-Income (<50% of AMI)	488	12,196	114,442	27.3%	25.6%	25.9%
Estimated Extremely Low-Income (0-30% of AMI)	*241*	*N/A*	*N/A*	*13.5%*	*N/A*	*N/A*
Low-Income (50%-80% of AMI)	281	7,023	65,892	15.7%	14.7%	14.9%
Moderate-Income (80%-120% of AMI)	283	7,937	72,712	15.9%	16.6%	16.5%
Above Moderate-Income (>120% of AMI)	733	20,531	188,130	41.1%	43.1%	42.6%
Total	**1,785**	**47,687**	**441,176**	**100.0%**	**100.0%**	**100.0%**

4. Population, Employment and Household Characteristics

4.1 Population

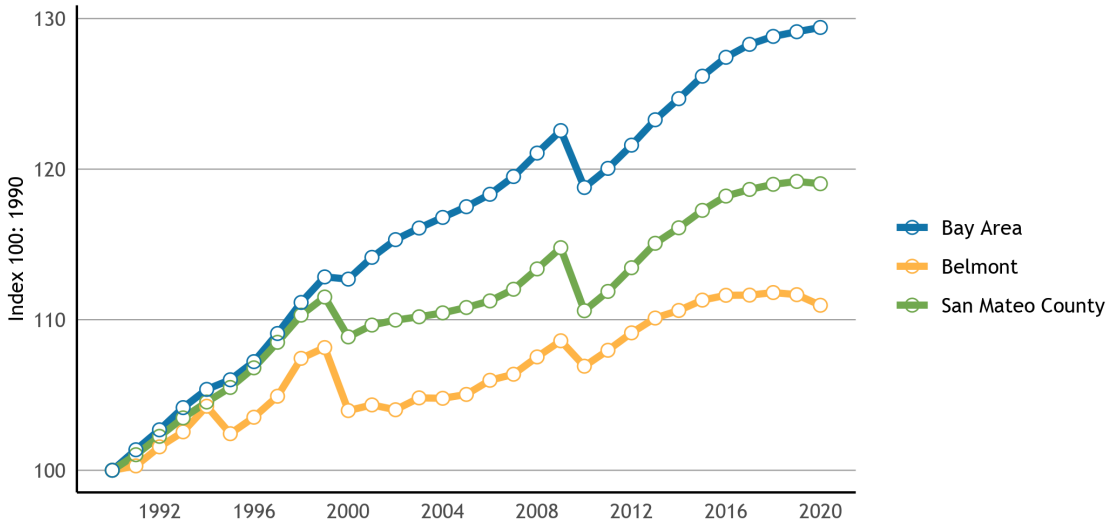
The Bay Area is the fifth-largest metropolitan area in the nation and has seen a steady increase in population since 1990, apart from a dip during the Great Recession. Many cities in the region have experienced significant growth in jobs and population. While these trends have led to a corresponding increase in demand for housing across the region, the regional production of housing has largely not kept pace with job and population growth. Since 2000, Belmont's population has increased by 6.7%, while the region as a whole has experienced an increase of 14.8%. Approximately 13.5% of Belmont's population moved during 2020, a number 0.1% greater than the regional rate of 13.4%.

Table 3: Population Growth Trends

Geography	1990	1995	2000	2005	2010	2015	2020
Belmont	24,165	24,752	25,123	25,382	25,835	26,896	26,813
San Mateo County	649,623	685,354	707,163	719,844	718,451	761,748	773,244
Bay Area	6,020,147	6,381,961	6,784,348	7,073,912	7,150,739	7,595,694	7,790,537

Universe: Total population.
Source: California Department of Finance, E-5 series.
For more years of data, please refer to the Data Packet Workbook, Table POPEMP-01.

Figure 1: Population Growth Trends



Source: California Department of Finance, E-5 series Note: The data shown on the graph represents population for the jurisdiction, county, and region indexed to the population in the first year shown. The data points represent the relative population growth in each of these geographies relative to their populations in that year. DOF uses the decennial census to benchmark subsequent population estimates. For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-01.

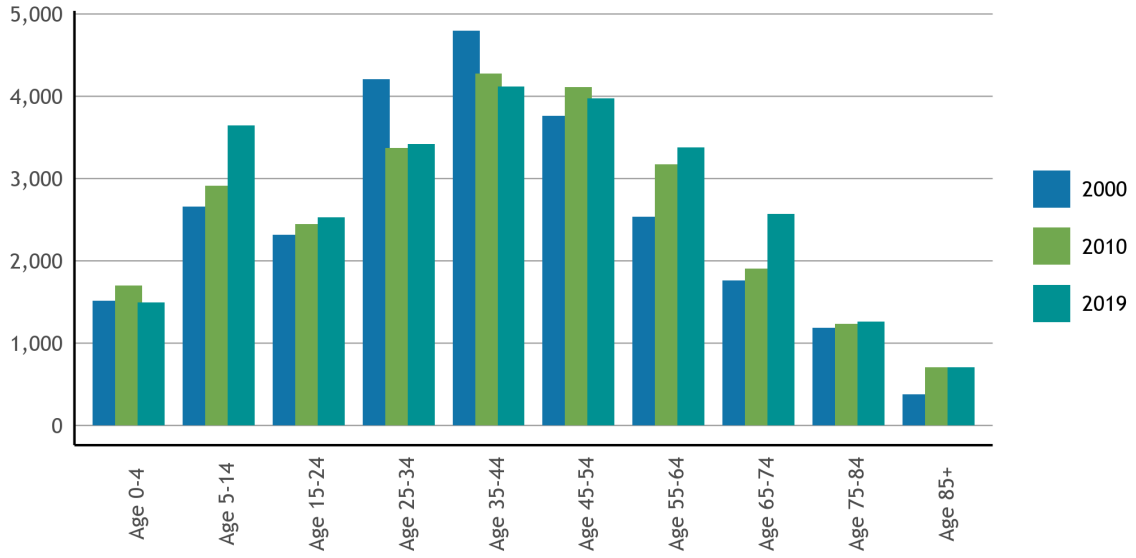
In 2020, the population of Belmont was estimated at 26,813, or 3.5% of San Mateo County's population. From 1990 to 2000, the City's population increased by 4.0%; from 2000 to 2010, it increased by 2.8%; and from 2010 to 2020, it increased by 3.8%.

4.2 AGE

The distribution of age groups in a city shapes the types of housing the community may need soon. For example, an increase in the older population may mean there is a need to develop more senior housing, while higher numbers of children and young families can point to a need for more family housing and related services. There has also been a move by many to age-in-place or downsize to stay within their communities, which can mean more multi-family and accessible units are also needed.

In Belmont, the median age in 2000 was 38.5. By 2019, this figure increased to approximately 40 years old. More specifically, the population of those under 14 and those 65-and-over has increased since 2010 (see Figure 2).

Figure 2: Population by Age (2000-2019)

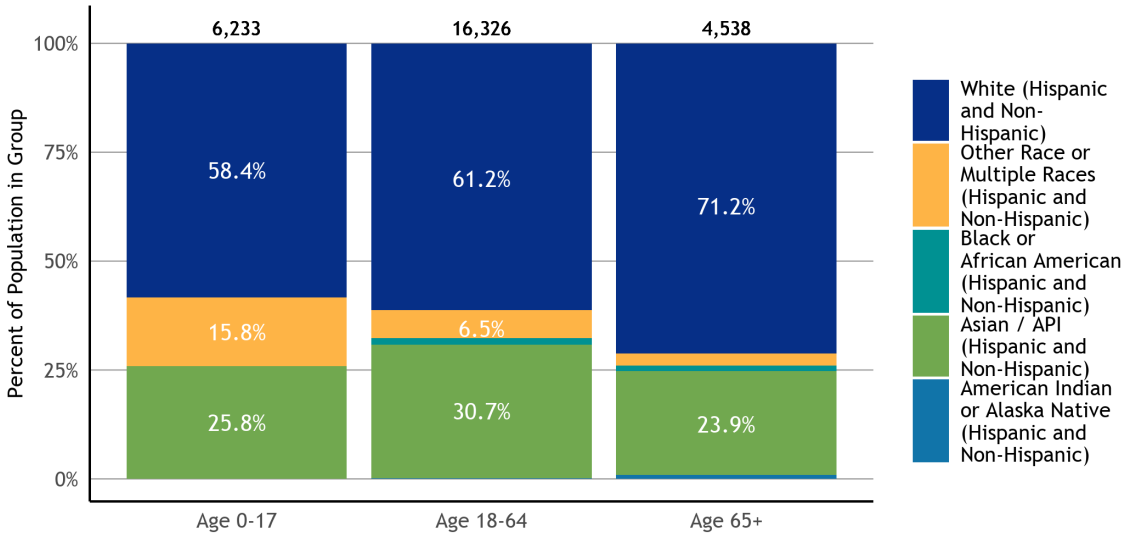


Universe: Total population.
Source: U.S. Census Bureau, Census 2000 SF1, Table P12; U.S. Census Bureau, Census 2010 SF1, Table P12; U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B01001
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-04.

Looking at the youth and senior populations by race can add an additional layer of understanding, as families and seniors of color are even more likely to experience challenges

finding affordable housing. In Belmont, people of color[6] constitute 41.6% of youth under 18 and 28.8% of seniors (see Figure 3).

Figure 3: Senior and Youth Population by Race



Universe: Total population.
Notes: In the sources for this table, the Census Bureau does not disaggregate racial groups by Hispanic/Latinx ethnicity, and an overlapping category of Hispanic / non-Hispanic groups has not been shown to avoid double counting in the stacked bar chart.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B01001(A-G)
For the data table behind this figure, please refer to the Data Packet Workbook, Table SEN-02.

4.3 RACE AND ETHNICITY

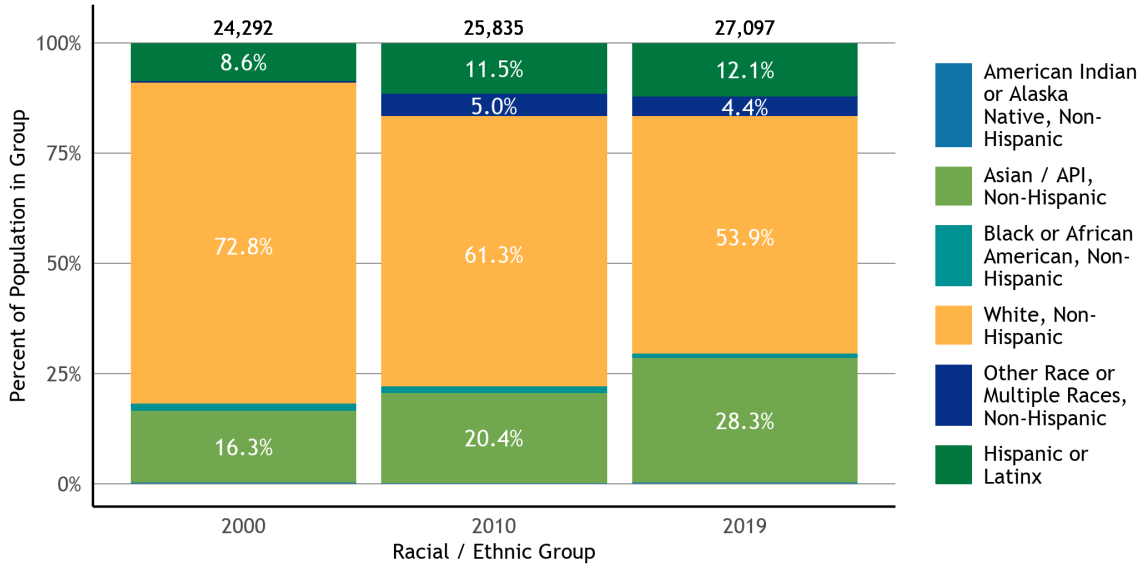
Understanding the racial makeup of a city and region is important for designing and implementing effective housing policies and programs. These patterns are shaped by both market factors and government actions, such as exclusionary zoning, discriminatory lending practices, and displacement that have occurred over time and continue to impact communities of color today.[7]

Since 2000, the percentage of residents in Belmont identifying as White has decreased–and by the same token, the percentage of residents of all other races and ethnicities has increased–by 18.9%, with the 2019 population standing at 14,611 (see Figure 4). During this period, the *Asian/API, Non-Hispanic* population increased the most while the *White, Non-Hispanic* population decreased the most.

[6] Here, we count all non-white racial groups.

[7] See, for example, Rothstein, R., 2017. The Color of Law: a Forgotten History of How our Government Segregated America. New York, NY & London, UK: Liveright Publishing.

Figure 4 Population by Race (2000-2019)



Universe: Total population.
Notes: Data for 2019 represents 2015-2019 ACS estimates. The Census Bureau defines Hispanic/Latinx ethnicity separate from racial categories. For the purposes of this graph, the "Hispanic or Latinx" racial/ethnic group represents those who identify as having Hispanic/Latinx ethnicity and may also be members of any racial group. All other racial categories on this graph represent those who identify with that racial category and do not identify with Hispanic/Latinx ethnicity.
Source: U.S. Census Bureau, Census 2000, Table P004; U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B03002
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-02.

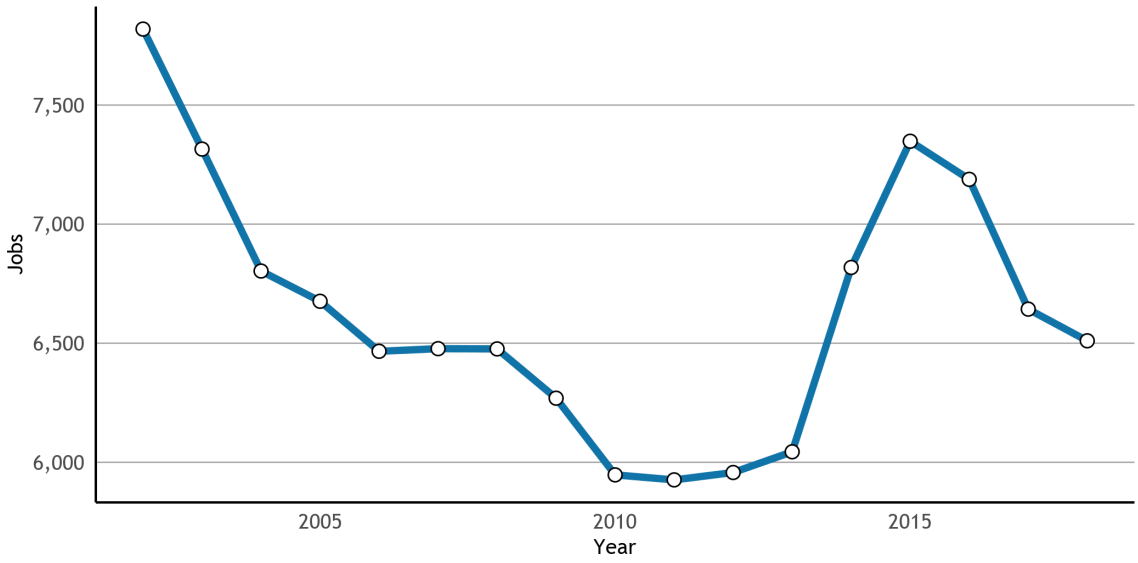
4.4 EMPLOYMENT TRENDS

BALANCE OF JOBS AND WORKERS

A city houses employed residents who either work in the community where they live or work elsewhere in the region. Conversely, a city may have job sites that employ residents from the same city, but more often employ workers commuting from outside of it. Smaller cities typically have more employed residents than jobs and "export" workers, while larger cities tend to have a surplus of jobs and "import" workers.

To some extent, the regional transportation system is set up for the flow of workers to the region's core job centers. At the same time, as the housing affordability crisis has illustrated, local imbalances may be severe, where local jobs and worker populations are out of sync at a sub-regional scale. One measure of this is the relationship between workers and jobs. From 2002 to 2018, the number of jobs in Belmont decreased by 16.7% (see Figure 5).

Figure 5: Jobs in Belmont (2002-2018)



Universe: Jobs from unemployment insurance-covered employment (private, state and local government) plus United States Office of Personnel Management-sourced Federal employment.
Notes: The data is tabulated by place of work, regardless of where a worker lives. The source data is provided at the census block level. These are crosswalked to jurisdictions and summarized.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics, Workplace Area Characteristics (WAC) files, 2002-2018
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-11.

From 2002-2018, the largest-growing job sectors were *Information* (100%), followed by *Health and Educational Services* (32%), *Government* (31%), and *Professional and Managerial Services* (22%). By contrast, *Transportation and Utilities* (-34%), and *Retail* (-28%) saw substantial decreases during this period. In Belmont, there are 13,688 employed residents and 7,867 jobs[8] and the ratio of jobs to resident workers is 0.57; therefore, Belmont is a net exporter of workers.

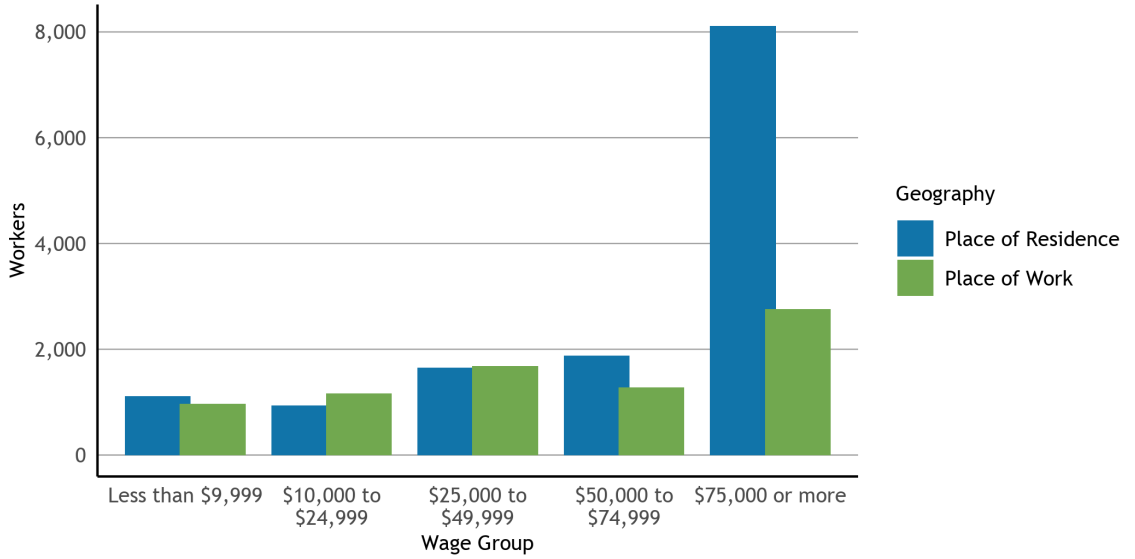
Figure 6 shows the balance when comparing jobs to workers, broken down by wage group and offering additional insights into local dynamics. A community may offer employment for relatively low-income workers but have relatively few housing options for those workers, or conversely, it may house residents who are low wage workers but offer few employment opportunities for them. Such relationships may cast extra light on potentially pent-up demand for housing in particular price categories.

A relative surplus of jobs relative to residents in each wage group suggests the need to import those workers while surpluses of workers in a wage group means the community will export workers to other jurisdictions. Such flows are not inherently bad, but over time, sub-regional imbalances may result. Belmont has more low-wage jobs (paying less than $25,000) than low-

[8] Employed *residents* in a jurisdiction is counted by place of residence (they may work elsewhere) while *jobs* in a jurisdiction are counted by place of work (they may live elsewhere). The jobs may differ from those reported in Figure 5 as the source for the time series is from administrative data, while the cross-sectional data is from a survey.

wage residents. The city also has more high-wage residents than high-wage jobs (paying more than $75,000) (see Figure 6).[9]

Figure 6: Workers by Earnings and Jurisdiction as Place of Work and Place of Residence



Universe: Workers 16 years and over with earnings.
Source: U.S. Census Bureau, American Community Survey 5-Year Data 2015-2019, B08119, B08519
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-10.

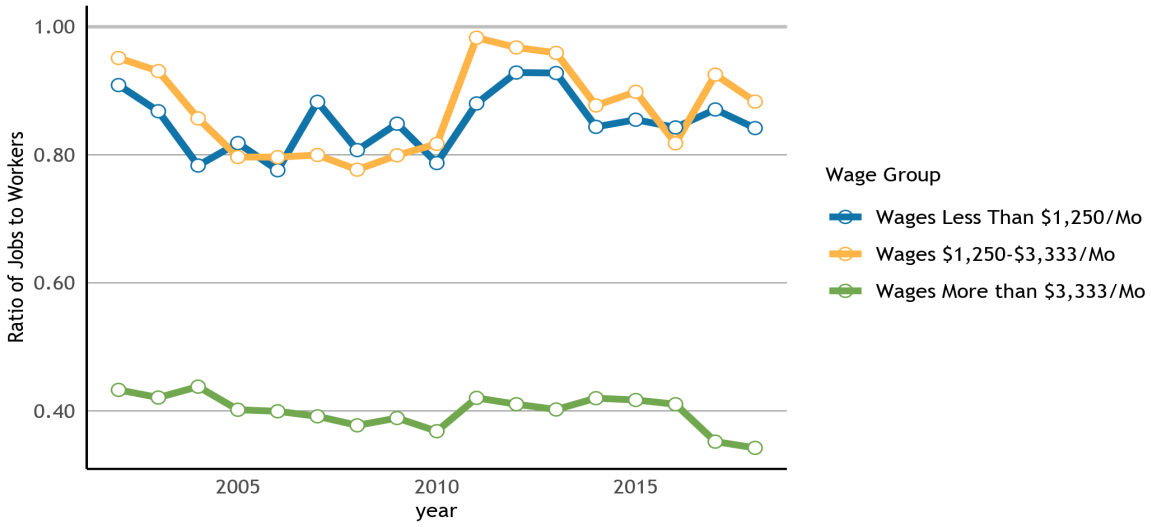
Figure 7 shows the balance of a jurisdiction's resident workers to the jobs located there for different wage groups as a ratio instead. A value of 1 means that a city has the same number of jobs as residents in a given wage group. Values above 1 indicate a jurisdiction will need to import workers. At the regional scale, the ratio is 1.04 jobs for each worker, implying a modest import of workers from outside the region (see Figure 7).

Such balances between jobs and workers may directly influence the housing demand in a community. New jobs may draw new residents, and when there is high demand for housing relative to supply, many workers may be unable to afford to live where they work, particularly where job growth has been in relatively lower wage jobs. This dynamic means many workers endure long commutes; it also contributes to traffic congestion and time lost for all road users.

When there are more jobs than employed residents, it means a city is relatively jobs-rich, typically also with a high jobs to household ratio. Thus, bringing housing into the measure, the *jobs to household ratio* in Belmont has decreased from 0.75 in 2002 to 0.62 in 2018 (see Figure 8).

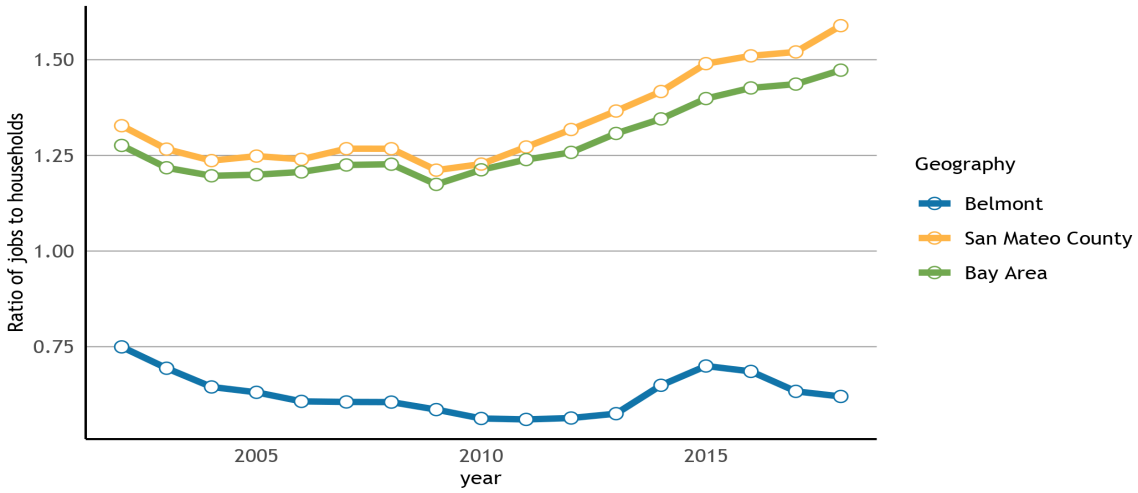
[9] The source table is top-coded at $75,000, precluding more fine grained analysis at the higher end of the wage spectrum.

Figure 7: Jobs-Worker Ratios by Wage Group



Universe: Jobs in a jurisdiction from unemployment insurance-covered employment (private, state and local government) plus United States Office of Personnel Management-sourced Federal employment.
Notes: The ratio compares job counts by wage group from two tabulations of LEHD data: Counts by place of work relative to counts by place of residence. See text for details.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics, Workplace Area Characteristics (WAC) files (Jobs); Residence Area Characteristics (RAC) files (Employed Residents), 2010-2018. For the data table behind this figure, please refer to the Workbook, Table PO PEMP-14.

Figure 8: Jobs-Household Ratio

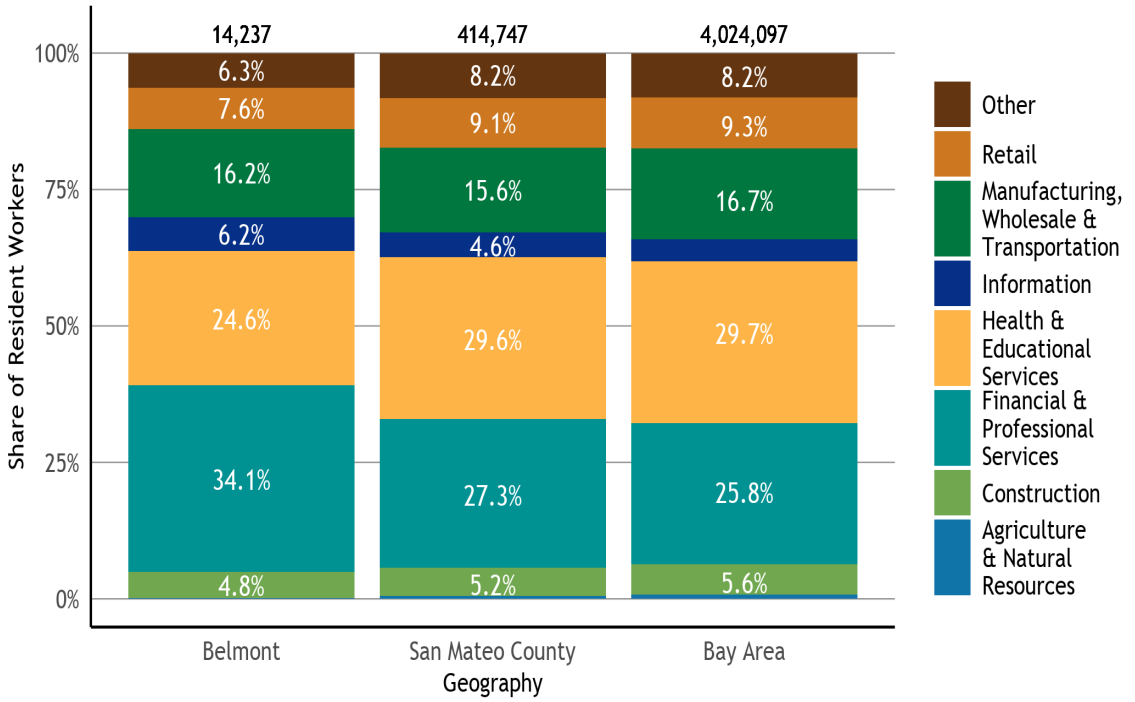


Universe: Jobs in a jurisdiction from unemployment insurance-covered employment (private, state and local government) plus United States Office of Personnel Management-sourced Federal employment; households in a jurisdiction.
Notes: The data is tabulated by place of work, regardless of where a worker lives. The source data is provided at the census block level. These are crosswalked to jurisdictions and summarized. The ratio compares place of work wage and salary jobs with households, or occupied housing units. A similar measure is the ratio of jobs to housing units. However, this jobs-household ratio serves to compare the number of jobs in a jurisdiction to the number of housing units that are actually occupied. The difference between a jurisdiction's jobs-housing ratio and jobs-household ratio will be most pronounced in jurisdictions with high vacancy rates, a high rate of units used for seasonal use, or a high rate of units used as short-term rentals.
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics, Workplace Area Characteristics (WAC) files (Jobs), 2002-2018; California Department of Finance, E-5 (Households).
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-13.

SECTOR COMPOSITION

In terms of sectoral composition, the largest industry in which Belmont residents work is *Financial & Professional Services*, while the *Health & Educational Services* industry employs the most San Mateo County and Bay Area residents (see Figure 9).

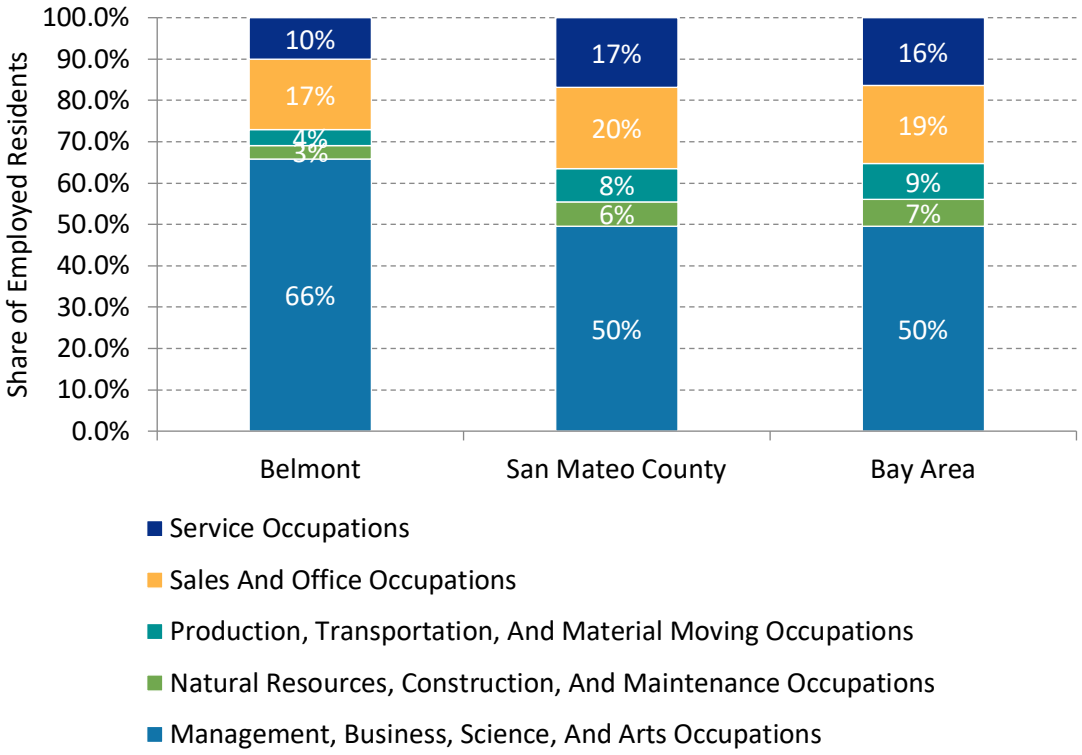
Figure 9: Resident Employment by Industry



Universe: Civilian employed population age 16 years and over.
Notes: The data displayed shows the industries in which jurisdiction residents work, regardless of the location where those residents are employed (whether within the jurisdiction or not). Categories are derived from the following source tables: Agriculture & Natural Resources: C24030_003E, C24030_030E; Construction: C24030_006E, C24030_033E; Manufacturing, Wholesale & Transportation: C24030_007E, C24030_034E, C24030_008E, C24030_035E, C24030_010E, C24030_037E; Retail: C24030_009E, C24030_036E; Information: C24030_013E, C24030_040E; Financial & Professional Services: C24030_014E, C24030_041E, C24030_017E, C24030_044E; Health & Educational Services: C24030_021E, C24030_024E, C24030_048E, C24030_051E; Other: C24030_027E, C24030_054E, C24030_028E, C24030_055E.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table C24030.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-06.

Looked at a different way, *Management, Business, Science, and Arts* occupations constitute approximately 66% of Belmont residents' employment, which is substantially higher than both San Mateo County and the Bay Area as a whole.

Figure 10: Resident Employment by Occupation



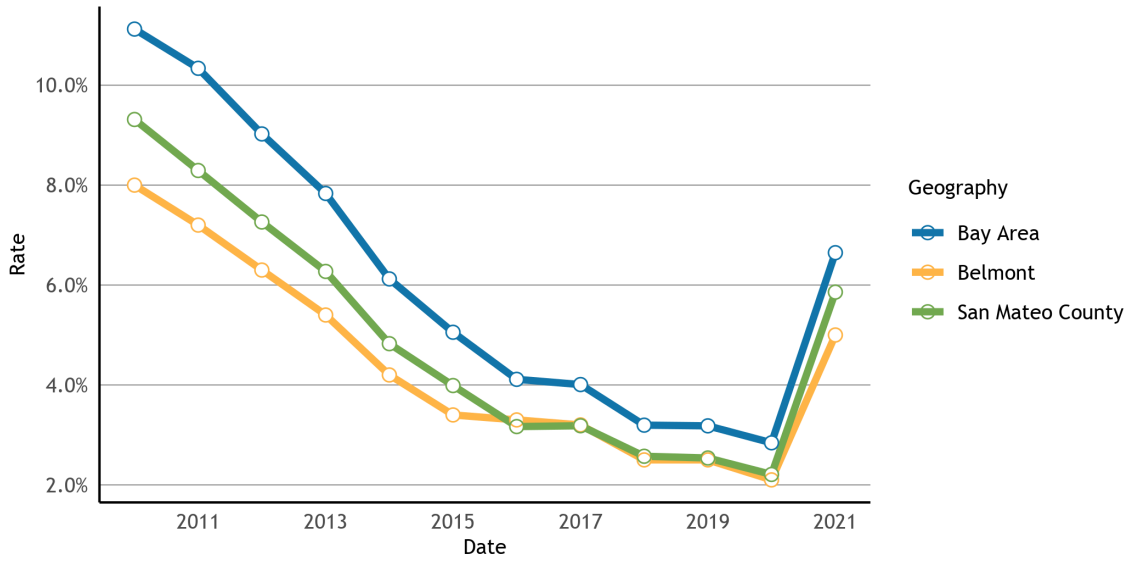
Universe: Civilian employed population age 16 years and over.
Notes: The data displayed shows the occupations of jurisdiction residents, regardless of the location where those residents are employed (whether within the jurisdiction or not).
Categories are derived from the following source tables: management, business, science, and arts occupations: C24010_003E, C24010_039E; service occupations: C24010_019E, C24010_055E; sales and office occupations: C24010_027E, C24010_063E; natural resources, construction, and maintenance occupations: C24010_030E, C24010_066E; production, transportation, and material moving occupations: C24010_034E, C24010_070E.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table C24010.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-07.

UNEMPLOYMENT

In Belmont, there was a 3.0% decrease in the unemployment rate between January 2010 and January 2021. Jurisdictions throughout the region experienced a sharp rise in unemployment in 2020 due to the impacts of the COVID-19 pandemic, though there was a general improvement and recovery in the later months of 2020.

As of May 2021, the State Employment Development Department estimated Belmont's unemployment rate at 3.8%. By contrast, the rate for all of San Mateo County was estimated at 4.8%.

Figure 11: Unemployment Rate



Universe: Civilian noninstitutional population ages 16 and older.
Notes: Unemployment rates for the jurisdiction level is derived from larger-geography estimates. This method assumes that the rates of change in employment and unemployment are exactly the same in each sub-county area as at the county level. If this assumption is not true for a specific sub-county area, then the estimates for that area may not be representative of the current economic conditions. Since this assumption is untested, caution should be employed when using these data. Only not seasonally-adjusted labor force (unemployment rates) data are developed for cities and CDPs.
Source: California Employment Development Department, Local Area Unemployment Statistics (LAUS), Sub-county areas monthly updates, 2010-2021. For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-15.

4.5 2018-2028 OCCUPATION PROJECTIONS

The State Employment Development Department published job projections for the period of 2018 to 2028. Although the data included both San Mateo and San Francisco counties, some assumptions can be made about the impact of the number of jobs and corresponding wages in the region.

Many of the occupations with the most job openings will earn the employee less than $35,000 annually. Based on 2021 State income limits, such individuals are considered extremely low-income.

TABLE 4: OCCUPATIONS WITH THE MOST JOB OPENINGS (2018-2028)

Occupational Title	Total Job Openings	Median Hourly Wage	Median Annual Wage
Personal Care Aides	62,650	$12.16	$25,283
Combined Food Prep and Servers, incl. Fast Food	52,090	$13.71	$28,524
Wait Staff	48,580	$14.73	$30,632
Software Developers, Applications	38,710	$67.39	$140,175
Cashiers	37,140	$13.54	$28,161
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	28,060	$14.81	$30,807

Occupational Title	Total Job Openings	Median Hourly Wage	Median Annual Wage
Cooks, Restaurant	26,840	$16.35	$34,016
Retail Salespersons	25,280	$14.28	$29,700
Market Research Analysis/Marketing Specialists	24,060	$42.60	$88,609
Taxi Drivers and Chauffeurs	21,540	$18.57	$38,644

Notes: Total job openings are the sum of numeric change, exits, and transfers projected between 2018 and 2028. Wages are from the 2020 first quarter and do not include self-employed or unpaid family workers. If an estimate could not be provided for wages, they are excluded from this table. Excludes "All Other" categories. These are residual codes that do not represent a detailed occupation.
Sources: U.S. Bureau of Labor Statistics' Current Employment Statistics (CES) March 2019 benchmark and Quarterly Census of Employment and Wages (QCEW) industry employment, https://www.labormarketinfo.edd.ca.gov/data/employment-projections.html.

4.6 EXTREMELY LOW-INCOME HOUSEHOLDS

Despite the economic and job growth experienced throughout the region since 1990, the income gap has continued to widen. California is one of the most economically unequal states in the nation, and the Bay Area has the highest income inequality between high- and low-income households in the State.[10] In Belmont, 59.5% of households make more than 100% of the Area Median Income (AMI),[11] compared to 11.1% making less than 30% of AMI, which is considered extremely low-income (see Figure 12).

Regionally, more than half of all households make more than 100% AMI, while 15% make less than 30% AMI. In San Mateo County, 30% AMI is the equivalent to the annual income of $44,000 for a family of four. Many households with multiple wage earners–including food service workers, full-time students, teachers, farmworkers, and healthcare professionals–can fall into lower AMI categories due to relatively stagnant wages in many industries.

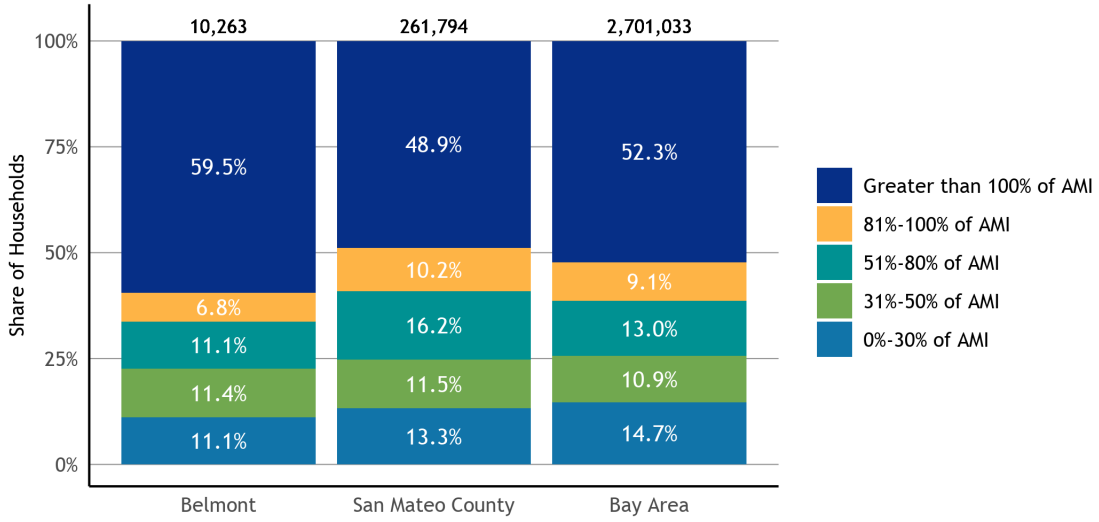
State law requires jurisdictions to estimate the number of extremely low-income households–those earning less than 30% of median income. According to the data illustrated in Figure 12, 2,318 of Belmont's households are 0-50% AMI, while 1,143 are extremely low-income. Therefore, extremely low-income households represent 49.3% of households who are 0-50% AMI. Figure 12 represents a tabulation of Census Bureau Data, in keeping with HCD's guidance

[10] Bohn, S.et al. 2020. Income Inequality and Economic Opportunity in California. *Public Policy Institute of California*.

[11] Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located. Households making between 80 and 120 percent of the AMI are moderate-income, those making 50 to 80 percent are low-income, those making 30 to 50 percent are very low-income, and those making less than 30 percent are extremely low-income. This is then adjusted for household size.

to use U.S. Census data to calculate the percentage of very low-income RHNA that qualifies for extremely low-income households.

Figure 12: Households by Household Income Level



Universe: Occupied housing units.
Notes: Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located. The data that is reported for the Bay Area is not based on a regional AMI but instead refers to the regional total of households in an income group relative to the AMI for the county where that household is located. Local jurisdictions are required to provide an estimate for their projected extremely low-income households (0-30% AMI) in their Housing Elements. HCD's official Housing Element guidance notes that jurisdictions can use their RHNA for very low-income households (those making 0-50% AMI) to calculate their projected extremely low-income households. As Bay Area jurisdictions have not yet received their final RHNA numbers, this document does not contain the required data point of projected extremely low-income households. The report portion of the housing data needs packet contains more specific guidance for how local staff can calculate an estimate for projected extremely low-income households once jurisdictions receive their 6th cycle RHNA numbers.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table ELI-01.

Extremely low-income (ELI) households are more likely to experience housing problems and cost burden. In Belmont, there are approximately 365 ELI owner-households, representing 5.9% of owners throughout the City, and 779 ELI renter-households, representing 12.6% of renters. A nearly equal portion of ELI renter households experience cost burden greater than 30% compared to ELI owner-households, at 70.7% and 70.8%, respectively. However, as a group, renters in the extremely low-income category are disproportionately represented in cost burden–ELI renters represent 32.6% of all renter households with a cost burden, while ELI owners represent 25.2% of all owners with a cost burden. Similarly, 52.8% of renter households with a severe cost burden earn extremely low incomes, while that figure is just 43.6% for owner households.

Overall, 11.1% of households in Belmont are ELI. By comparison, 13.3% of households countywide are in the extremely low-income category. While White households make up the bulk of the ELI households (61.2%), many households of color also earn extremely low incomes. For example, Asian/Pacific Islander households make up 15.7% of extremely low-income households in Belmont, while Hispanic/Latinx make up 12.7% (while only representing 8.7% of the total population). Racial/ethnic, income, and housing problem demographics are further described in Appendix D, Affirmatively Furthering Fair Housing, of this Housing Element.

RESOURCES FOR EXTREMELY LOW-INCOME HOUSEHOLDS

The City remains committed to assisting in the development and preservation of existing affordable housing and will continue to focus on lifting residents out of poverty by providing a safe, attractive, and affordable place to live. While housing alone does not eliminate poverty, access to adequate shelter must be provided before people can strive for self-sufficiency.

The Housing Choice Voucher Program managed by San Mateo County also serves very low- and extremely low-income families, senior households, and persons with disabilities. The City aims to provide additional resources for ELI households through programs outlined in this Housing Element's Implementation Plan, Appendix G. This includes additional fair housing actions from the AFFH. While there are County resources available for ELI households, this group remains vulnerable throughout the City and the region.

Understanding households by income and race/ethnic group can shed light on the challenges faced by people of color in terms of access to affordable housing. Table 5 illustrates the disparities between White and other racial/ethnic groups. Although 11% of households are extremely low-income citywide, 30% of Black/African American households are in this income category.[12]

There are also regional disparities between the incomes of homeowners and renters. Typically, the number of low-income renters greatly outpaces the amount of housing available that is affordable for these households.

[12]These figures are somewhat skewed because White households make up the vast majority of households in the City but are illustrative of differences.

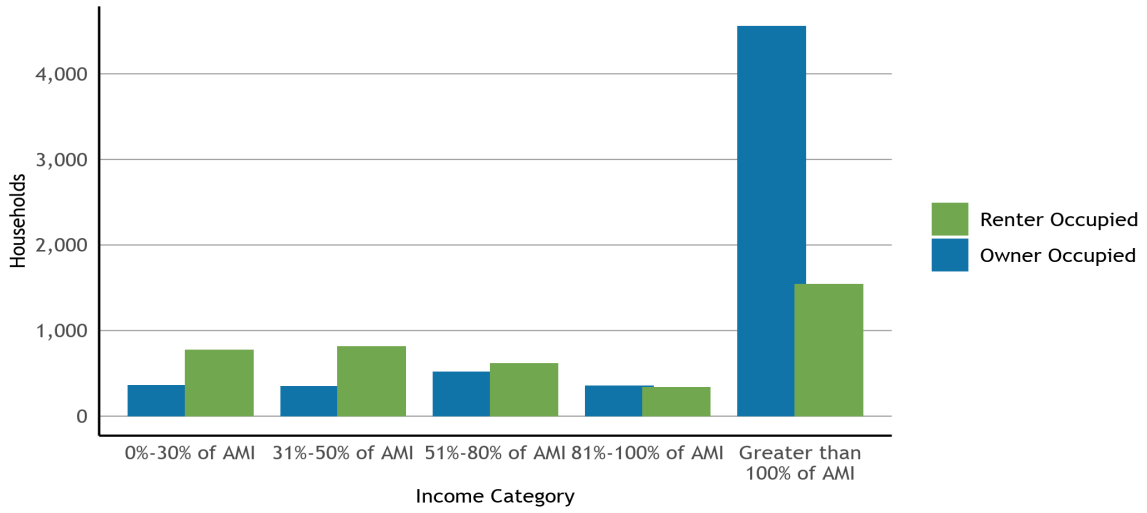
TABLE 5: HOUSEHOLD DISTRIBUTION BY RACE/ETHNICITY AND INCOME

Racial / Ethnic Group	0%-30% of AMI	31%-50% of AMI	51%-80% of AMI	81%-100% of AMI	Greater than 100% of AMI
American Indian or Alaska Native, Non-Hispanic	14%	0%	0%	0%	86%
Asian / API, Non-Hispanic	7%	6%	9%	4%	74%
Black or African American, Non-Hispanic	30%	0%	20%	7%	43%
White, Non-Hispanic	11%	12%	12%	8%	56%
Other Race or Multiple Races, Non-Hispanic	25%	14%	7%	5%	48%
Hispanic or Latinx	16%	25%	8%	9%	42%
Total	**11%**	**11%**	**11%**	**7%**	**59%**

Universe: Occupied housing units.
Notes: Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located. For the purposes of this graph, the "Hispanic or Latinx" racial/ethnic group represents those who identify as having Hispanic/Latinx ethnicity and may also be members of any racial group. All other racial categories on this graph represent those who identify with that racial category and do not identify with Hispanic/Latinx ethnicity.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table ELI-02.

In Belmont, the largest proportion of renters and homeowners fall into the *Greater than 100% of AMI* income group (see Figure 13).

Figure 13: Household Income Level by Tenure

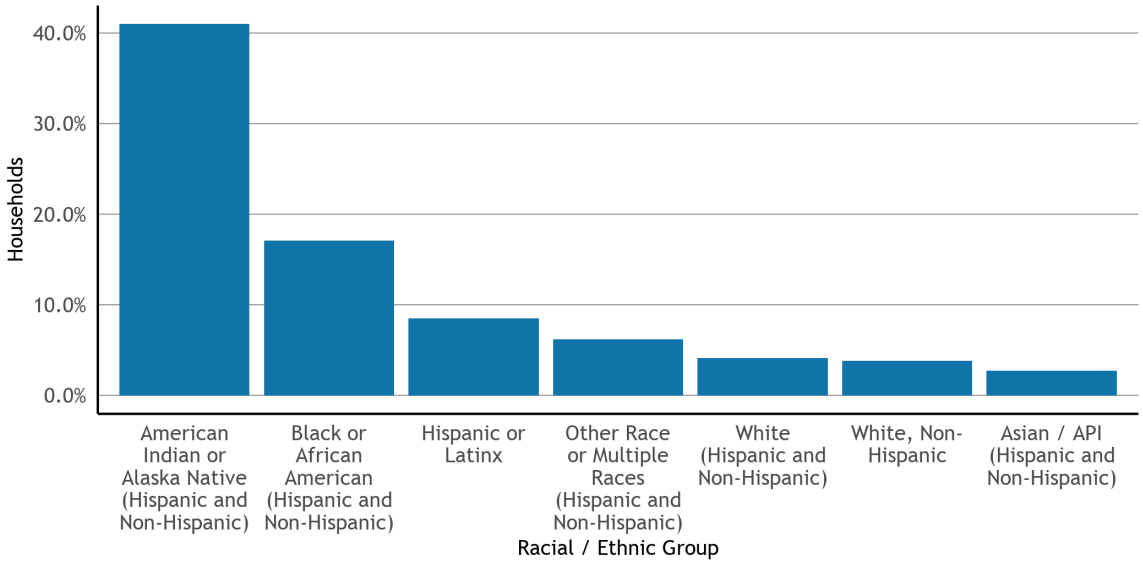


Universe: Occupied housing units.
Notes: Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-21.

Currently, people of color are more likely to experience poverty and financial instability because of federal and local housing policies that have historically excluded them from the same opportunities extended to White residents.[13] These economic disparities also leave communities of color at higher risk for housing insecurity, displacement, and homelessness.

In Belmont, *American Indian or Alaska Native (Hispanic and Non-Hispanic)* residents experience the highest poverty rates, followed by *Black or African American (Hispanic and Non-Hispanic)* residents (see Figure 14).

Figure 14: Poverty Status by Race



Universe: Population for whom poverty status is determined.
Notes: The Census Bureau uses a federally defined poverty threshold that remains constant throughout the country and does not correspond to Area Median Income. For this table, the Census Bureau does not disaggregate racial groups by Hispanic/Latinx ethnicity. However, data for the white racial group is also reported for white householders who are not Hispanic/Latinx. Since residents who identify as white and Hispanic/Latinx may have very different experiences within the housing market and the economy from those who identify as white and non-Hispanic/Latinx, data for multiple white sub-groups are reported here. The racial/ethnic groups reported in this table are not all mutually exclusive. Therefore, the data should not be summed as the sum exceeds the population for whom poverty status is determined for this jurisdiction. However, all groups labelled "Hispanic and Non-Hispanic" are mutually exclusive, and the sum of the data for these groups is equivalent to the population for whom poverty status is determined.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B17001(A-I). For the data table behind this figure, please refer to the Data Packet Workbook, Table ELI-03.

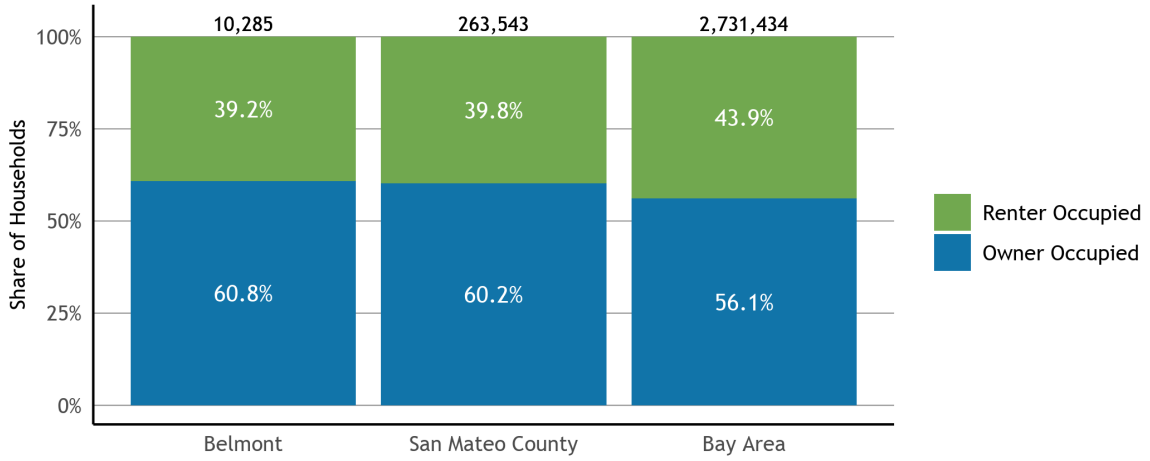
4.7 TENURE

The number of residents who own their homes compared to those who rent their homes can help identify the level of housing insecurity, or the ability for individuals to stay in their homes, within a city and region. Generally, renters may be displaced more quickly if prices increase. In Belmont, there are 10,285 housing units, and fewer residents rent (39.2%) than own (60.8%). As

[13] Moore, E., Montojo, N. and Mauri, N., 2019. Roots, Race & Place: A History of Racially Exclusionary Housing the San Francisco Bay Area. *Hass Institute*.

seen in Figure 15, this is similar to San Mateo County, though in the Bay Area as a whole, a greater percentage rent (43.9%).

Figure 15: Housing Tenure



Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25003.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-16.

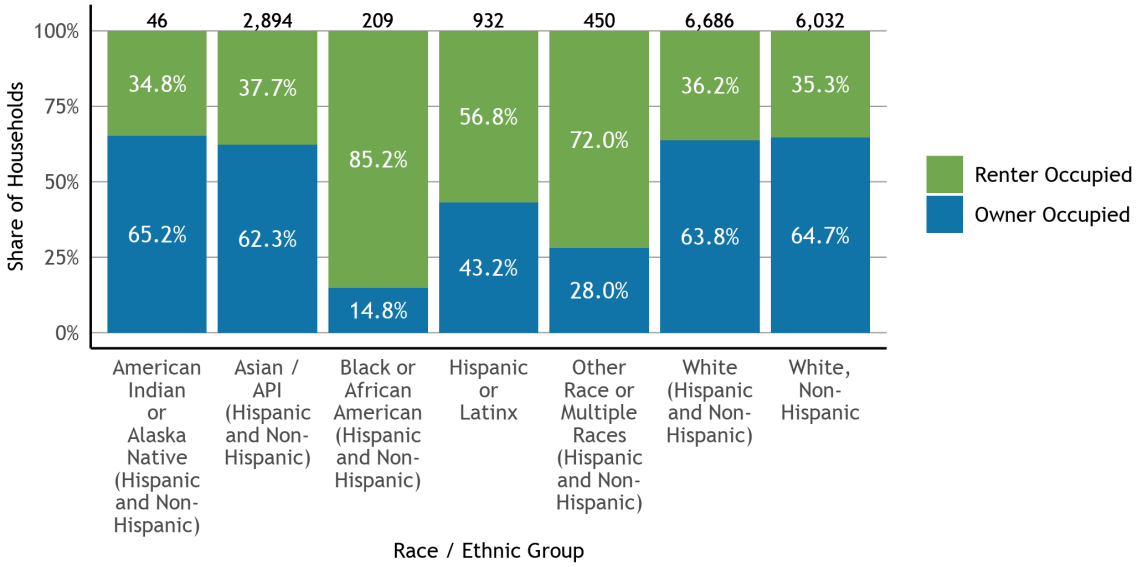
Homeownership rates often vary considerably across race/ethnicity in the Bay Area and throughout the country. These disparities not only reflect differences in income and wealth but also stem from federal, state, and local policies that limited access to homeownership for communities of color while facilitating homebuying for White residents. While many of these policies, such as redlining, have been formally disbanded, the impacts of race-based policies are still evident across Bay Area communities.[14]

In Belmont, 14.8% of Black households owned their homes, while homeownership rates were 43.2% for Latinx households, 62.3% for Asian households, and 63.8% for White households. Recent changes to State law require local jurisdictions to examine these dynamics and other fair housing issues when updating their Housing Elements.

The age of residents who rent or own their home can also signal housing challenges. Younger households tend to rent and may struggle to buy a first home in the Bay Area due to high housing costs, while senior homeowners seeking to downsize may have limited options in an expensive housing market.

[14] See, for example, Rothstein, R. (2017). The color of law: a forgotten history of how our government segregated America. New York, NY & London, UK: Liveright Publishing.

Figure 16: Housing Tenure by Race of Householder



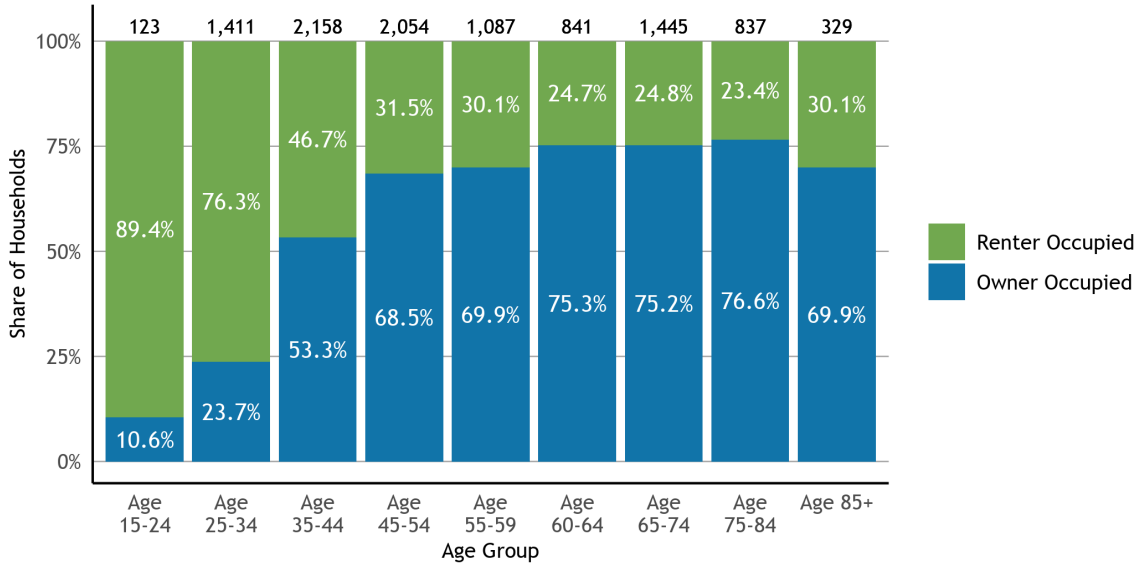
Universe: Occupied housing units.
Notes: For this table, the Census Bureau does not disaggregate racial groups by Hispanic/Latinx ethnicity. However, data for the white racial group is also reported for white householders who are not Hispanic/Latinx. Since residents who identify as white and Hispanic/Latinx may have very different experiences within the housing market and the economy from those who identify as white and non-Hispanic/Latinx, data for multiple white sub-groups are reported here. The racial/ethnic groups reported in this table are not all mutually exclusive. Therefore, the data should not be summed as the sum exceeds the total number of occupied housing units for this jurisdiction. However, all groups labelled "Hispanic and Non-Hispanic" are mutually exclusive, and the sum of the data for these groups is equivalent to the total number of occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25003(A-I).
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-20.

In Belmont, 58.4% of householders between the ages of 25 and 44 are renters, while 25.0% of householders over 65 are (see Figure 17).

Information regarding the year in which a household moved to their current residence further illustrates the differences between long-term residents, who tend to trend older, and newer residents. As shown in Figure 18, 93% of households that moved in in 1989 or earlier are owner occupied, whereas only 22% of households that moved in in 2017 or later are owner occupied.

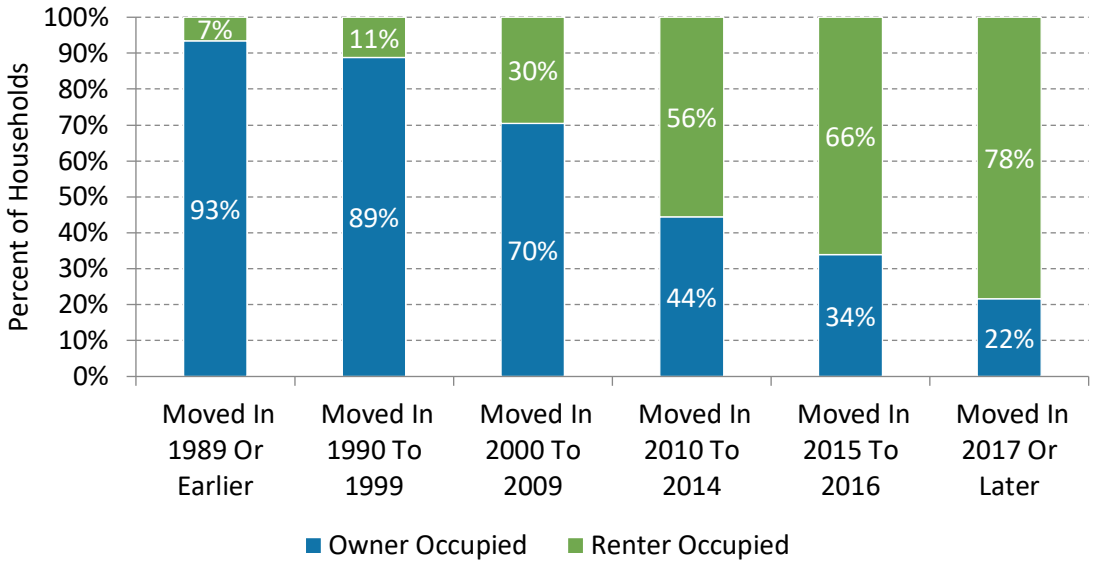
In many cities, homeownership rates for households in single-family homes are substantially higher than the rates for households in multi-family housing. In Belmont, 91.1% of households in detached single-family homes are homeowners, while 11.3% of households in multi-family housing are homeowners (see Figure 19).

Figure 17: Housing Tenure by Age



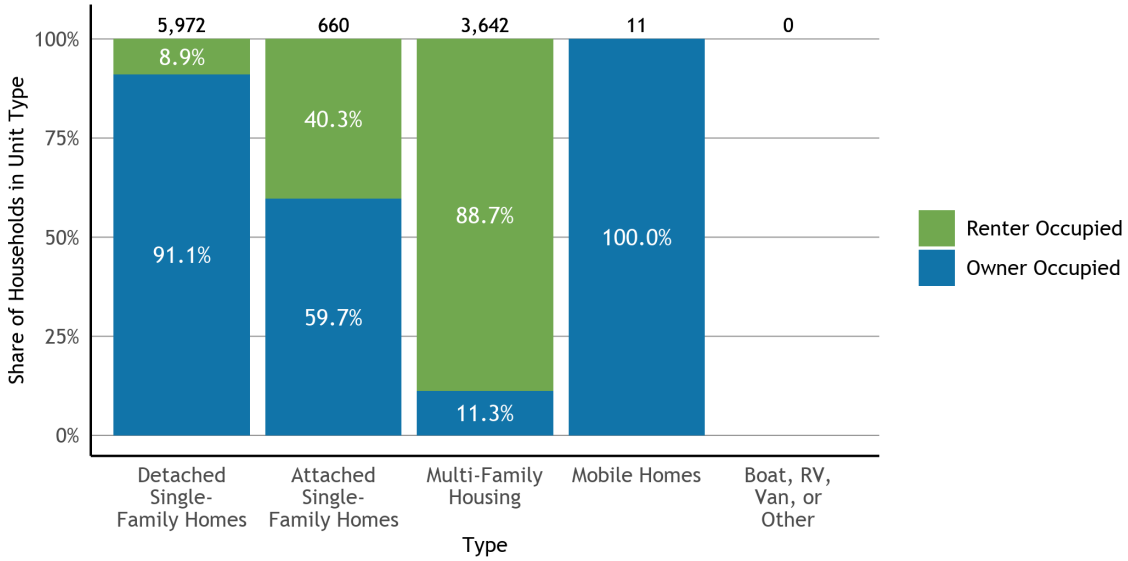
Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25007.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-18.

Figure 18: Housing Tenure by Year Moved to Current Residence



Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25038.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-19.

Figure 19: Housing Tenure by Housing Type



Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25032. For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-22.

4.8 DISPLACEMENT

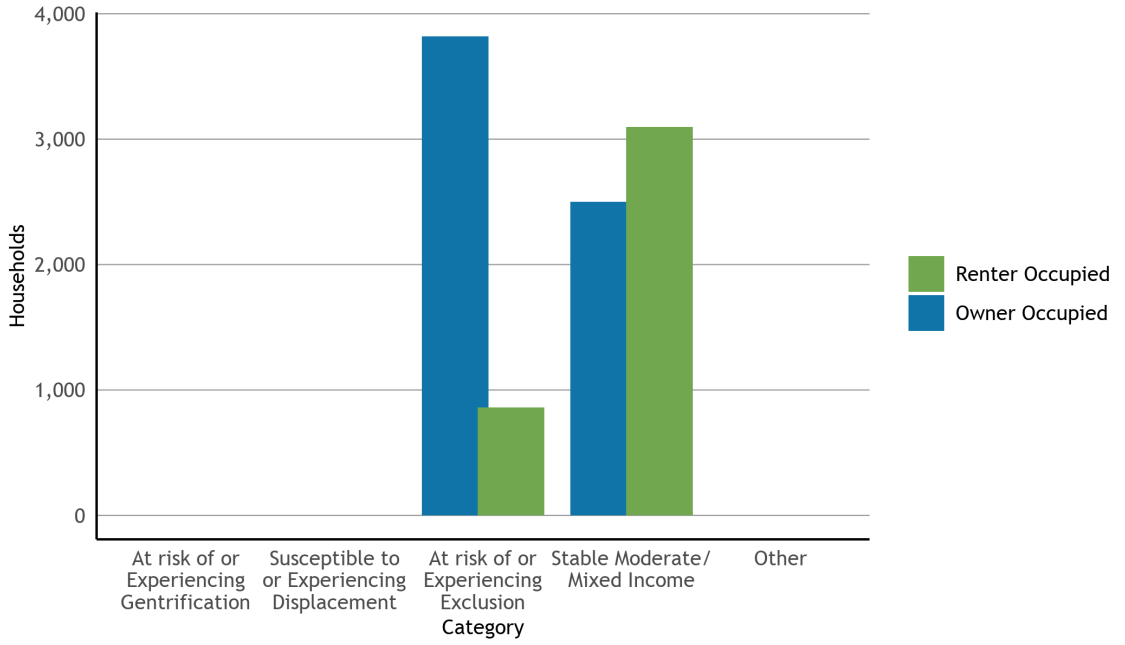
Due to increasing housing prices, displacement is a major concern in the Bay Area. Displacement has the most severe impacts on low- and moderate-income residents. When individuals or families are forced to leave their homes and communities, they also lose their support network.

The University of California (UC), Berkeley has mapped all neighborhoods in the Bay area, identifying their risk for gentrification. They found that in Belmont, no households are *Susceptible to or Experiencing Displacement* or are *At Risk of or Undergoing Gentrification*.

Equally important, some Bay Area neighborhoods do not have housing appropriate for a broad section of the workforce. UC Berkeley estimates that 45.5% of households in Belmont live in neighborhoods where low-income households are likely to be excluded due to prohibitive housing costs.[15]

[15] More information about this gentrification and displacement data is available at the Urban Displacement Project's webpage: https://www.urbandisplacement.org/. Specifically, one can learn more about the different gentrification/displacement typologies shown in Figure 20 at this link: https://www.urbandisplacement.org/sites/default/files/typology_sheet_2018_0.png. Additionally, one can view maps that show which typologies correspond to which parts of a jurisdiction here: https://www.urbandisplacement.org/san-francisco/sf-bay-area-gentrification-and-displacement.

Figure 20: Households by Displacement Risk and Tenure



Universe: Households.
Notes: Displacement data is available at the census tract level. Staff aggregated tracts up to jurisdiction level using census 2010 population weights, assigning a tract to jurisdiction in proportion to block level population weights. Total household count may differ slightly from counts in other tables sourced from jurisdiction level sources. Categories are combined as follows for simplicity: At risk of or Experiencing Exclusion: At Risk of Becoming Exclusive; Becoming Exclusive; Stable/Advanced Exclusive At risk of or Experiencing Gentrification: At Risk of Gentrification; Early/Ongoing Gentrification; Advanced Gentrification Stable Moderate/Mixed Income: Stable Moderate/Mixed Income Susceptible to or Experiencing Displacement: Low-Income/Susceptible to Displacement; Ongoing Displacement Other: High Student Population; Unavailable or Unreliable Data.
Source: Urban Displacement Project for classification, American Community Survey 5-Year Data (2015-2019), Table B25003 for tenure. For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-25.

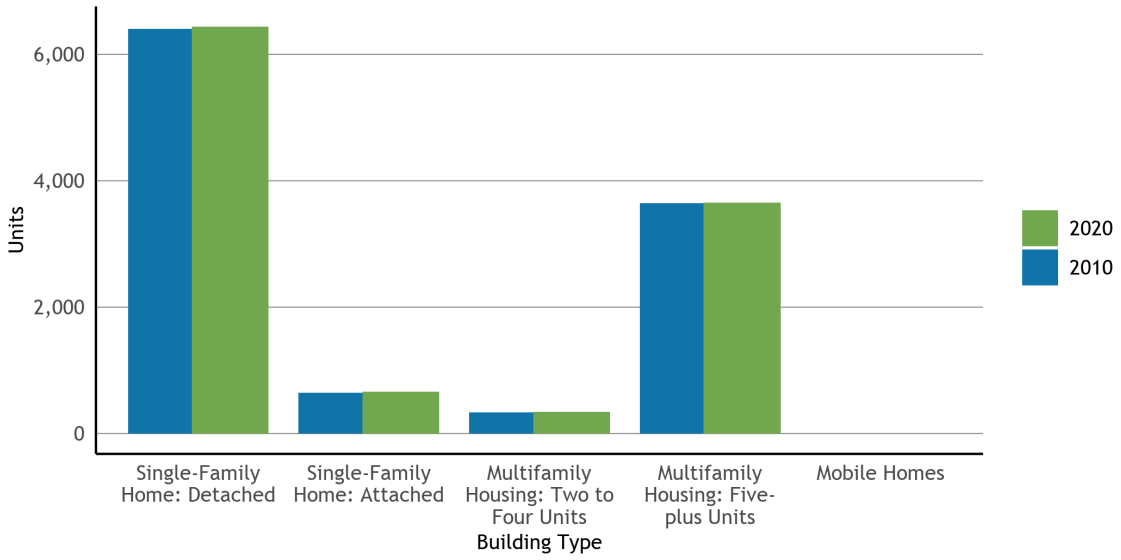
5. Housing Stock Characteristics

5.1 Housing Types, Year Built, Vacancy, and Permits

In recent years, most housing produced in the region and across the State has consisted of single-family homes and larger multi-unit buildings. However, some households are increasingly interested in "missing middle housing" –including duplexes, triplexes, townhomes, cottage clusters, and accessory dwelling units (ADUs). These housing types may open more options across incomes and tenure, from young households seeking homeownership to seniors looking to downsize and age-in-place.

The 2020 Belmont housing stock was made up of 58.0% single-family detached homes, 32.9% multi-family homes with five or more units, 6.0% single-family attached homes, 3.1% multi-family homes with two to four units, and 0.0% mobile homes (see Figure 21). From 2010 to 2020, the housing type that experienced the most growth was *Single-Family Home: Detached*.

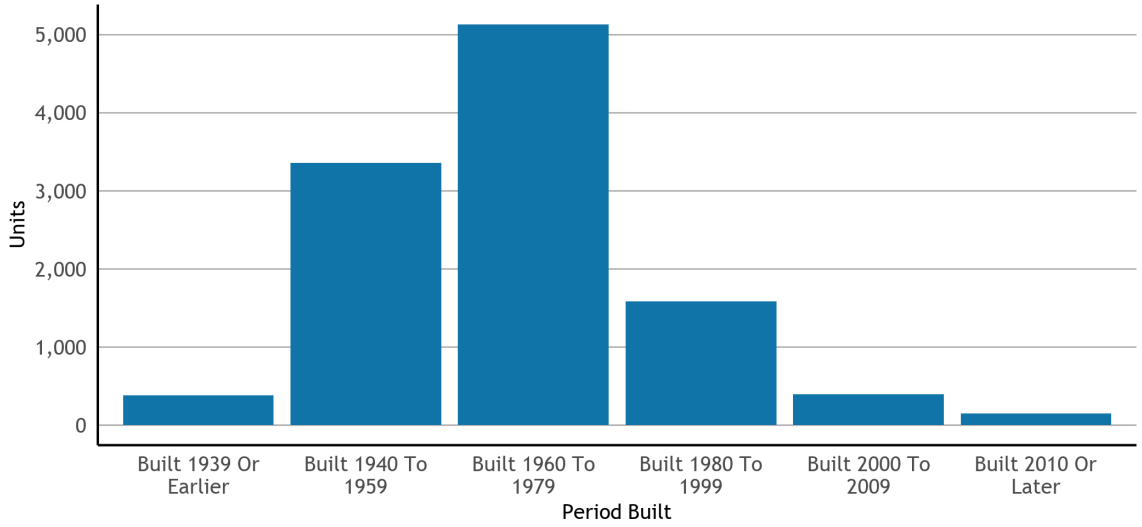
Figure 21: Housing Type Trends



Universe: Housing units.
Source: California Department of Finance, E-5 series.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-01.

For several decades, Bay Area housing production has not kept pace with the demand; the total number of units built and available has not yet neared the regional population and job growth. In Belmont, the largest proportion of the housing stock (5,131 units) was built from 1960 to 1979 (see Figure 22). Since 2010, 1.4% (or 149 units) of the current housing stock has been built.

Figure 22: Housing Units by Year Structure Built



Universe: Housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25034.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-04.

Vacant units constitute 6.5% of Belmont's overall housing stock. The rental vacancy rate stands at 10.0%, while the ownership vacancy rate is 0.8%. Of the vacant units, the most common type of vacancy is *For Rent* (see Figure 23).[16]

Throughout the Bay Area, vacancies make up 2.6% of the total housing units, with homes listed *for rent*; units *for seasonal, recreational, or occasional use*; and units not otherwise classified (*other vacant*) making up the majority of vacancies. The Census Bureau classifies a unit as vacant if no one is occupying it when census interviewers are conducting the American Community Survey or Decennial Census. Units classified as *for seasonal, recreational, or occasional* use are those held for short-term periods of use throughout the year, such as vacation rentals and short-term rentals like AirBnB.

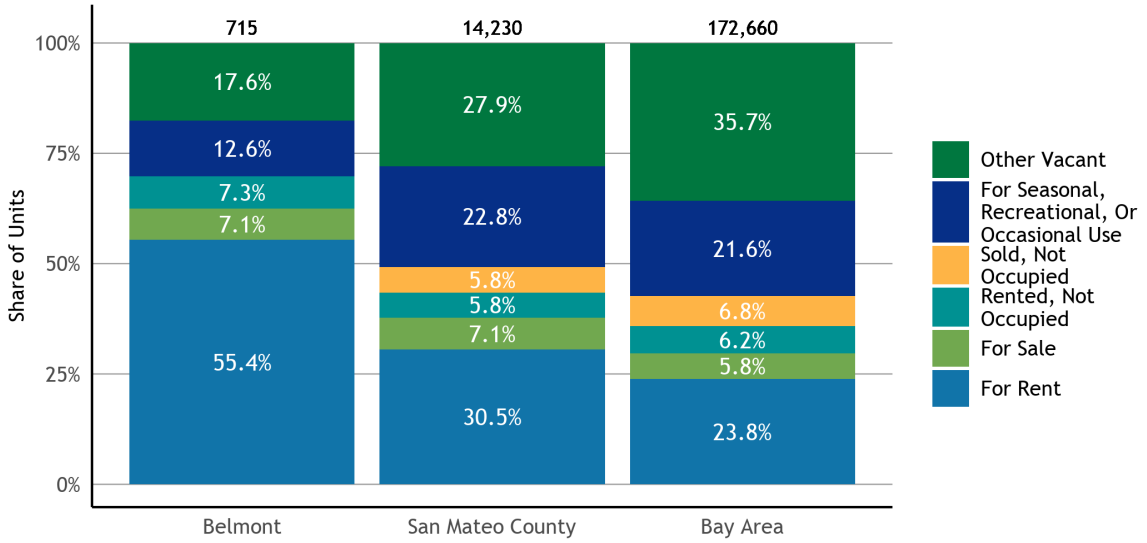
The Census Bureau classifies units as *other vacant* when vacancy occurs due to foreclosure, personal/ family reasons, legal proceedings, repairs/renovations, abandonment, preparation for being rented or sold, or an extended absence for reasons such as a work assignment, military duty, or incarceration.[17] In a region with a thriving economy and housing market like the Bay Area, units being renovated/repaired and prepared for rental or sale are also likely to represent a large portion of this category. Additionally, the need for seismic retrofitting in older housing

[16] The vacancy rates by tenure is for a smaller universe than the total vacancy rate first reported, which in principle includes the full stock (6.5%). The vacancy by tenure counts are rates relative to the rental stock (occupied and vacant) and ownership stock (occupied and vacant) - but exclude a significant number of vacancy categories, including the numerically significant *other vacant*.

[17] For more information, see pages 3 through 6 of this list of definitions prepared by the Census Bureau, https://www.census.gov/housing/hvs/definitions.pdf.

stock could influence *other vacant* rates.[18] In Belmont, the State Department of Finance currently estimates the vacancy rate is approximately 5.7%. Countywide, it is estimated at 5.5%.

Figure 23: Vacant Units by Type



Universe: Vacant housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25004.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-03.

From 2015 to 2021, Belmont issued permits for 508 housing units. Of these, 70% were for above moderate-income housing, 10% were for moderate-income housing, and 20% were for low- or very low-income housing (see Table 6).

TABLE 6: CITY OF BELMONT HOUSING PERMITTING (2015-2021)

Income Group	Number of Permits Issued
Above Moderate-income Permits	378
Moderate-income Permits	0
Low-income Permits	84
Very Low-income Permits	46

Universe: Housing permits issued between 2015 and 2021.
Notes: HCD uses the following definitions for the four income categories: Very Low-income: units affordable to households making less than 50% of the Area Median Income for the county in which the jurisdiction is located. Low-income: units affordable to households making between 50% and 80% of the Area Median Income for the county in which the jurisdiction is located. Moderate Income: units affordable to households making between 80% and 120% of the Area Median Income for the county in which the jurisdiction is located. Above Moderate-income: units affordable to households making above 120% of the Area Median Income for the county in which the jurisdiction is located.
Source: California Department of Housing and Community Development (HCD), 5th Cycle Annual Progress Report Permit Summary (2020).

[18] See Dow, P. (2018). Unpacking the Growth in San Francisco's Vacant Housing Stock: Client Report for the San Francisco Planning Department. University of California, Berkeley.

5.2 ASSISTED HOUSING DEVELOPMENTS AT-RISK OF CONVERSION

While there is an immense need to produce new affordable housing units, ensuring that the existing affordable housing stock remains affordable is equally important. It is typically faster and cheaper to preserve existing affordable units that are at risk of converting to market-rate than it is to build new affordable housing.

The California Housing Partnership Corporation's (CHPC) Preservation Database provides comprehensive data available on at-risk units. Table 7 shows the number of subsidized affordable housing at risk of losing their affordable status and converting to market-rate in Belmont, the County, and the region. However, this database does not include all deed-restricted affordable units in the State, so there may be at-risk assisted units in a jurisdiction that are not captured in this table.

TABLE 7: ASSISTED UNITS AT RISK OF CONVERSION

Risk Level	Belmont	San Mateo County	Bay Area
Low	84	4,656	110,177
Moderate	0	191	3,375
High	0	359	1,854
Very High	0	58	1,053
Total Assisted Units in Database	**84**	**5,264**	**116,459**

Universe: HUD, Low-income Housing Tax Credit (LIHTC), USDA, and CalHFA projects. Subsidized or assisted developments that do not have one of the aforementioned financing sources may not be included.
Notes: While California Housing Partnership's Preservation Database is the state's most comprehensive source of information on subsidized affordable housing at risk of losing its affordable status and converting to market-rate housing, this database does not include all deed-restricted affordable units in the state. Consequently, there may be at-risk assisted units in a jurisdiction that are not captured in this data table. Per HCD guidance, local jurisdictions must also list the specific affordable housing developments at-risk of converting to market rate uses. This document provides aggregate numbers of at-risk units for each jurisdiction, but local planning staff should contact Danielle Mazzella with the California Housing Partnership at dmazzella@chpc.net to obtain a list of affordable properties that fall under this designation.
Source: California Housing Partnership, Preservation Database (2020).
This table is included in the Data Packet Workbook as Table RISK-01.

According to the CHPC Perseveration Database, there are 84 assisted units in Belmont and of these units, none are at *High Risk* or *Very High Risk* of conversion.[19]

[19] California Housing Partnership uses the following categories for assisted housing developments in its database:

Very-High Risk: affordable homes that are at-risk of converting to market rate within the next year that do not have a known overlapping subsidy that would extend affordability and are not owned by a large/stable non-profit, mission-driven developer.

High Risk: affordable homes that are at-risk of converting to market rate in the next 1-5 years that do not have a known overlapping subsidy that would extend affordability and are not owned by a large/stable non-profit, mission-driven developer.

As of 2023, Belmont had a total of 302 affordable units, rather than the 84 noted by CHPC; this discrepancy is partially due to the City funding a few projects solely through the now-dissolved Redevelopment Agency.

As Table 8 indicates, there are a total of 106 units that are potentially at risk of conversion during this Housing Element planning period, which includes 104 units located in the Bonnie Brae Terrace complex and two single family properties at Oxford Place. The Bonnie Brae Terrace property has been purchased by a new owner who has stated their commitment to maintaining the unit affordability. The Oxford Place units are owned by moderate-income households who can either remain in the property or sell it after 2030. Any proceeds above a calculated moderate-income sales price would be taken by the City, which incentivizes an owner to sell to another qualifying purchaser. Belmont has confirmed that it does not have any publicly assisted housing units at-risk of conversion in the next ten years; however, annual monitoring as part of the Housing Element Annual Progress Report is still an important tool to ensure unit affordability.

This Housing Element includes Program H2.1, Support Retention of Existing Lower-income Units, which directs the City to continue monitoring all units potentially at risk of conversion to market rate annually.

Moderate Risk: affordable homes that are at-risk of converting to market rate in the next 5-10 years that do not have a known overlapping subsidy that would extend affordability and are not owned by a large/stable non-profit, mission-driven developer.

Low Risk: affordable homes that are at-risk of converting to market rate in 10+ years and/or are owned by a large/stable non-profit, mission-driven developer.

TABLE 8: CITY OF BELMONT INVENTORY OF PUBLICLY ASSISTED HOUSING PROJECTS (2023)

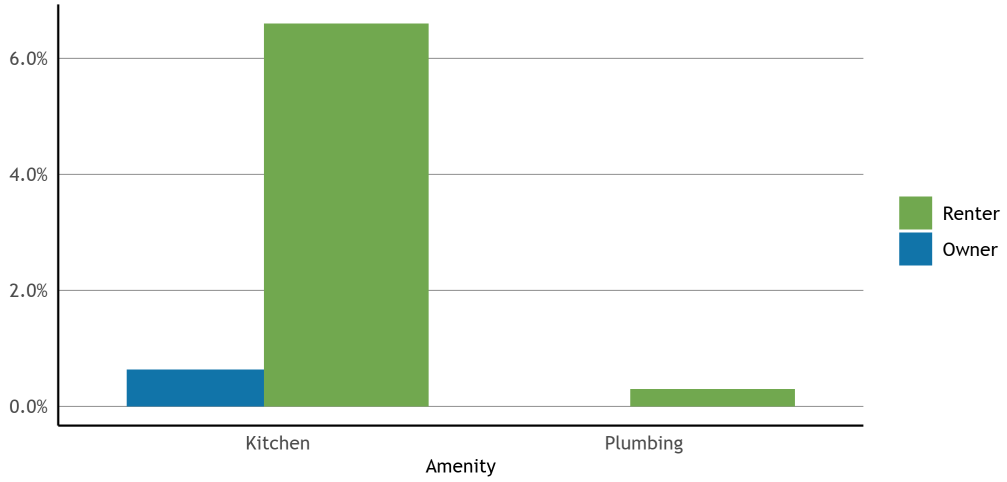
Project Name	Building Type	Total Units	Affordable Units	Household Type	Funding Sources	Conversion Risk	Expiration Date
Bonnie Brae Terrace (formerly Lesley Terrace): 2400 Carlmont Dr	Apartment	164	164	All lower-income groups	Section 8 (60 units)	Low	Section 8 - 2039
				Disabled; Seniors	Program 236 (104 units)	Medium	2031 (operator has indicated rents will remain below market rate)
Horizons: 825 Old County Rd	Apartment	24	24	Very low-income Families; Disabled	Section 8; City Housing Successor Loan; Program 202/162	Low; Non-profit manages	2039
Belmont House: 730 El Camino Real	Group Home	6	6	Low-income Disabled	City RDA; City Housing Successor	Low; City-owned	No expiration; City-owned property
Crestview Group Home: 503 Crestview	Group Home	6	6	Low- and moderate-income Disabled	County CDBG & State deferred loan; City Housing Successor	Low; City-owned	No expiration; City-owned property
Sterling Point: 935 Old County Rd	Townhomes (BMR)	48	7	Moderate-income First-time home buyers	City RDA	Medium; Units owned by residents	2039, 2041, 2041, 2041, 2042, 2042, 2042
Waltermire Apartments: 631 Waltermire St	Apartment	10	2	Moderate-income Families	City RDA	Medium	2039
Belmont Apartments: 800 F St	Apartment	24	24	Very low-income Disabled	City RDA; HOME; Mental Health Association of SMC	Low; MHA Owned	2058
Oxford Place: 25 and 41 Oxford Place	Single-family detached	21	2	Moderate-income Families	City RDA	Medium; BMR units owned by residents	2030 (30-year term renews when property sold)
Emmett House, 1000 O'Neill	Duplex	2	2	Moderate-income Families	City RDA	Low; City-owned	No expiration; City-owned property
Firehouse Square, 1300 El Camino Real	Apartment	66	65	All lower-income groups;	AHF, County, City, TCAC	Low; Non-profit manages	2090
Total		**371**	**302**				

Source: City of Belmont, 2024.

5.3 Substandard Housing

Regional housing costs are among the highest in the country, which could result in households—particularly renters—living in substandard conditions to afford housing. Generally, there is limited data on the extent of substandard housing in a community; however, the Census Bureau data included in Figure 24 provides a sense of some substandard conditions that may be present in Belmont. For example, 6.6% of Belmont renters reported lacking a complete kitchen and 0.3% of renters lacked complete plumbing, compared to 0.6% of owners who lack a complete kitchen and 0.0% of owners who lacked complete plumbing.

Figure 24: Substandard Housing Issues



Universe: Occupied housing units.
Notes: Per HCD guidance, this data should be supplemented by local estimates of units needing to be rehabilitated or replaced based on recent windshield surveys, local building department data, knowledgeable builders/developers in the community, or nonprofit housing developers or organizations.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25053, Table B25043, Table B25049.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-06.

Another measure of housing condition is the age of housing. In general, the older the unit, the greater it can be assumed to need some level of rehabilitation. A general rule in the housing industry is that structures older than 20 years begin to show signs of deterioration and require renovation to maintain their quality. Unless properly maintained, homes older than 50 years can pose health, safety, and welfare problems for occupants.

Consistent with State law, Table 9 estimates the number of units in need of rehabilitation or replacement in Belmont. Although the exact number of units in need of rehab is not currently known, the State accepts estimates based on a formula that assumes the older the unit, the more likely the rehab is in need. Rehabilitation needs can range from minor repairs to major structural replacements.

By applying an increasing percentage to the housing stock in each age category, it is estimated that there are approximately 1,311 units in need of some level of rehabilitation in Belmont,

representing 12% of the housing stock. It is estimated that nearly all units in need of rehabilitation can be repaired without replacement.

TABLE 9: AGE OF HOUSING STOCK AND ESTIMATED REHABILITATION NEEDS

	Net # of Units	Percent of Total	Units Needing Rehab, %	Units Needing Rehab, Total
Built 2014 or Later	87	0%		
Built 2010 to 2013	62	0%		
Built 2000 to 2009	395	1%	0.50%	2
Built 1990 to 1999	674	2%	1%	7
Built 1980 to 1989	909	2%	3%	27
Built 1970 to 1979	2,165	5%	5%	108
Built 1960 to 1969	2,966	7%	10%	297
Built 1950 to 1959	2,525	6%	20%	505
Built 1940 to 1949	833	2%	30%	250
Built 1939 or Earlier	384	1%	30%	115
Total	**11,000**	26%		**1,311**
Percentage of Total Units				*12%*
Units that Can Be Repaired			*99.50%*	*1,304*
Units that Must Be Replaced			*0.50%*	*7*

Source: American Community Survey 5-year estimates, 2019.

The most common code enforcement activities, as provided by Belmont's Code Enforcement Officer, includes residential yard and tree maintenance, illegal dumping, construction without permits, abandoned/inoperable vehicles, smoking in multi-family residential units (which is prohibited in Belmont), trash and debris in public view, rodent infestation, and dilapidated property fences. None of these frequent violation types provides insight into the estimated number of housing units in need of rehabilitation. Additionally, the code enforcement officer has confirmed that estimating rehabilitation needs based on age of housing stock is a reasonable measure. There do not appear to be any visual housing stock trends (i.e., boarded up windows/doors, roof or other structural damage, or significant external damage) in Belmont that would further guide housing rehabilitation needs/services.

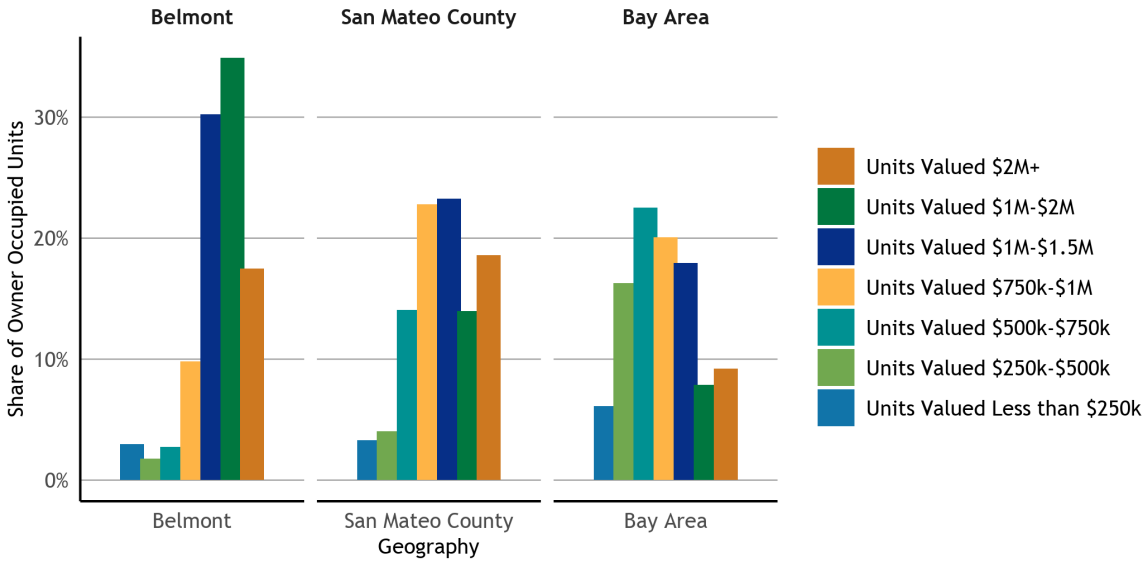
Housing Program H3.3 directs the City of Belmont to conduct a best practice review of local housing rehabilitation programs that the City can help provide to residents, and to research rehabilitation service providers that could target special needs groups.

5.4 HOME AND RENT VALUES

Home prices reflect a complex mix of supply and demand factors, including an area's demographic profile, labor market, prevailing wages, and job outlook, coupled with land and construction costs. In the San Francisco Bay Area, the costs of housing have long been among the highest in the nation. According to Zillow, the typical home value in Belmont in December 2020 was estimated at $1,876,610, while the largest proportion of homes were valued between $1M to $2M (see Figure 25). By comparison, the typical home value was $1,418,330 in San Mateo County and $1,077,230 in the Bay Area, with the largest share of units valued at $1M to $1.5M (County) and $500k to $750k (region).

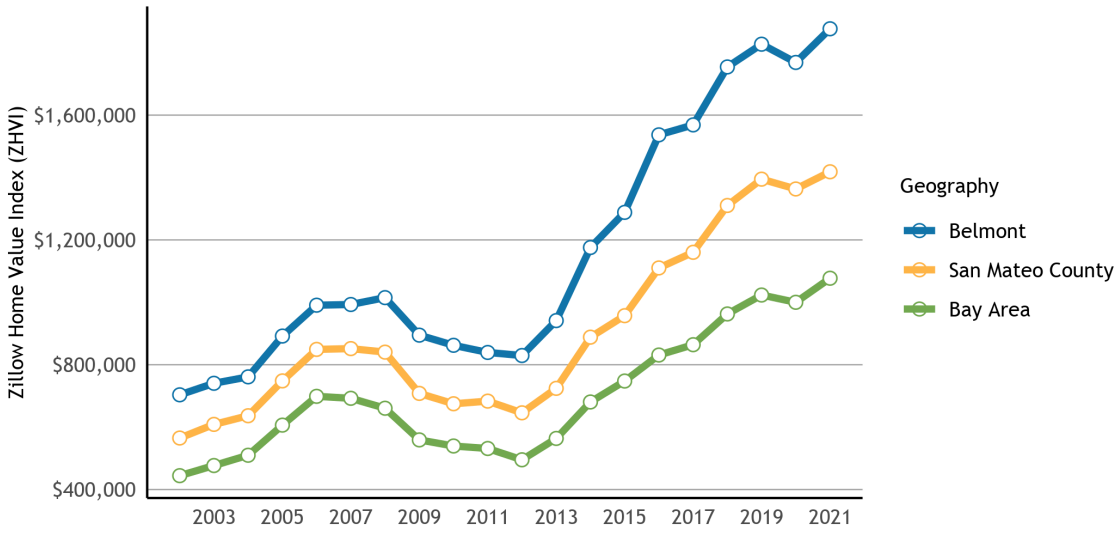
The region's home values have increased steadily since 2000, apart from a decrease during the Great Recession. The rise in home prices has been especially steep since 2012, with the median Bay Area home value nearly doubling. In Belmont, the typical home value has increased 166.7% between 2001 and 2020, from $703,600 to $1,876,610. Generally, the increase in home value has been greater in Belmont than in the County and the region (see Figure 26).

Figure 25: Home Values of Owner-Occupied Units



Universe: Owner-occupied units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25075.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-07.

Figure 26: Zillow Home Value Index (ZHVI)



Universe: Owner-occupied housing units.
Notes: Zillow describes the ZHVI as a smoothed, seasonally adjusted measure of the typical home value and market changes across a given region and housing type. The ZHVI reflects the typical value for homes in the 35th to 65th percentile range. The ZHVI includes all owner-occupied housing units, including both single-family homes and condominiums. More information on the ZHVI is available from Zillow. The regional estimate is a household-weighted average of county-level ZHVI files, where household counts are yearly estimates from DOF's E-5 series For unincorporated areas, the value is a population weighted average of unincorporated communities in the county matched to census-designated population counts.
Source: Zillow, Zillow Home Value Index (ZHVI). Refer to the Workbook, Table HSG-08.

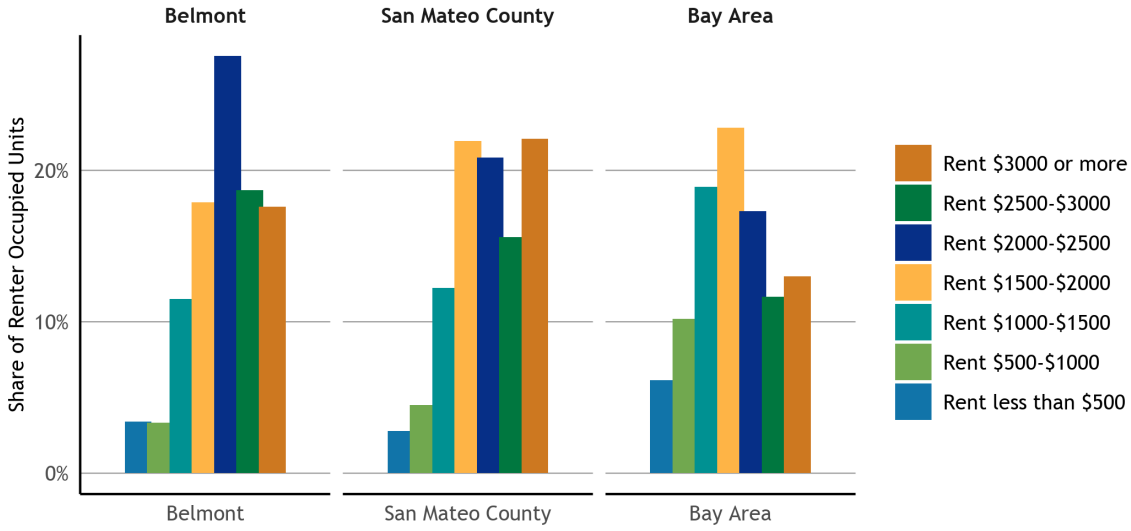
Like home values, rents have increased dramatically across the Bay Area in recent years. Many renters have been priced out, evicted, or displaced, particularly communities of color. Residents finding themselves in one of these situations may have had to choose between commuting long distances to their jobs and schools or moving out of the region, or even state.

In Belmont, from 2015 to 2019, the largest proportion (27.6%) of rental units fell into the *Rent $2,000-$2,500* category (see Figure 27). During this period, 18.7% of units were in the *Rent $2,500-$3,000* category. Looking beyond the city, the largest share of units is in the *$3,000 or more* category (County), or *$1,500-$2,000* category (region).

From 2009 to 2019, the median rent increased by 76.8% in Belmont, from $1,520 to $2,250 monthly (see Figure 28). In San Mateo County, the median rent increased 41.1%, from $1,560 to $2,200. The median rent in the region was lower, but also increased significantly during this time, from $1,200 to $1,850, a 54% increase.[20]

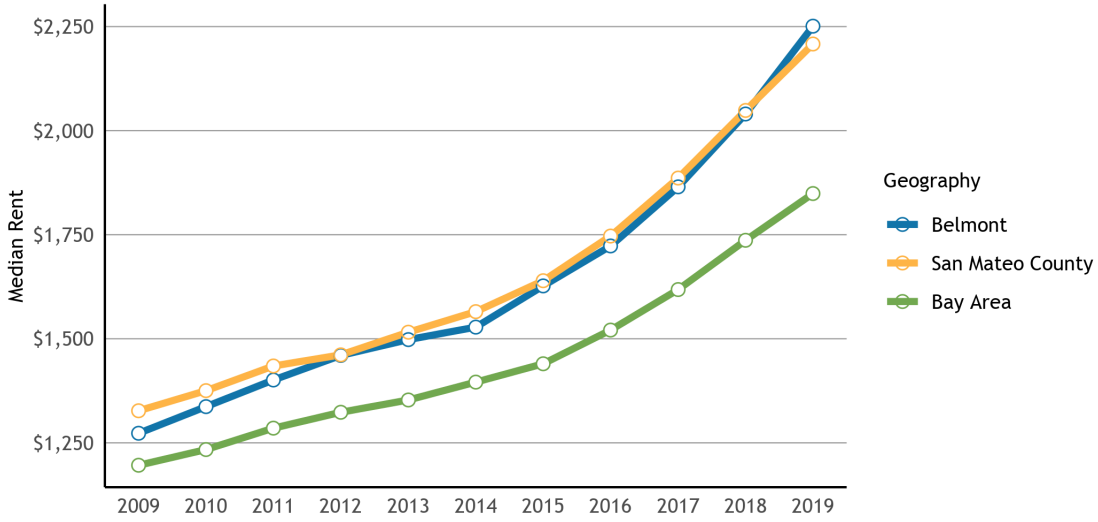
[20] While the data on home values shown in Figure 26 comes from Zillow, Zillow does not have data on rent prices available for most Bay Area jurisdictions. To have a more comprehensive dataset on rental data for the region, the rent data in this document comes from the U.S. Census Bureau's American Community Survey, which may not fully reflect current rents. Local jurisdiction staff may want to supplement the data on rents with local realtor data or other sources for rent data that are more current than Census Bureau data.

Figure 27: Contract Rents for Renter-Occupied Units



Universe: Renter-occupied housing units paying cash rent.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25056.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-09.

Figure 28: Median Contract Rent



Universe: Renter-occupied housing units paying cash rent.
Notes: For unincorporated areas, median is calculated using distribution in B25056.
Source: U.S. Census Bureau, American Community Survey 5-Year Data releases, starting with 2005-2009 through 2015-2019, B25058, B25056 (for unincorporated areas). County and regional counts are weighted averages of jurisdiction median using B25003 rental unit counts from the relevant year.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-10.

5.5 HOUSING AFFORDABILITY

The National Association of Homebuilders reports that California cities have some of the lowest homeowner affordability rates in the Country, defined as the percentage of homes affordable to a median income family. Despite high median incomes, many in the Bay Area cannot afford to purchase a home. The San Francisco-Redwood City Division, of which Belmont is a part, ranked 230th out of 233 metropolitan areas studied in the first quarter of 2021.

TABLE 10: HOUSING OPPORTUNITY INDEX (FIRST QUARTER, 2021)

	Homes Affordable to Median Income Households	Median Family Income (1,000s)	Median Sales Price (1,000s)	National Affordability Rank
Los Angeles-Long Beach-Glendale, CA[a]	11.6%	78.7	729	233
Salinas, CA	15.1%	80.9	725	232
San Francisco-Redwood City-South SF[a]	17.4%	143.4	1,305	230
Anaheim-Santa Ana-Irvine, CA[a]	18.2%	104.8	825	229
Napa, CA	22.1%	101.5	691	228
San Diego-Carlsbad, CA	22.4%	95.1	665	227
San Luis Obispo-Paso Robles-Arroyo Grande, CA	26.0%	97.8	675	226
Oxnard-Thousand Oaks-Ventura, CA	27.4%	98.8	650	225
Santa Cruz-Watsonville, CA	28.5%	111.9	850	224
Santa Maria-Santa Barbara, CA	28.8%	90.1	678	223
Stockton-Lodi, CA	29.6%	74.0	462	222
San Jose-Sunnyvale-Santa Clara, CA	29.9%	151.3	1,120	220
Oakland-Hayward-Berkeley, CA[a]	31.2%	121.3	795	219

[a] Indicate Metropolitan Divisions. All others are MSAs.
Source: National Association of Homebuilders, 2021, https://www.nahb.org/news-and-economics/housing-economics/indices/housing-opportunity-index.

Trulia—an online residential real estate site for homebuyers, sellers, renters, and real estate professionals—provides statistics based on actual sales of housing by location. According to a study conducted by zip code in 2019, only 0.2% of homes were affordable to the metropolitan median income of $101,000. The median home value reported by Trulia was $1,570,186. See https://www.trulia.com/research/affordable-neighborhoods/ for more information.

The high cost of housing means people wanting to own a home in Belmont must have significant incomes, even for the relatively less-expensive condominiums. In Belmont, a household must earn more than $400,000 annually to afford the Trulia-documented median priced home.

The decreasing supply of affordable rental units is a countywide phenomenon; it can include Ellis Act evictions (where an owner of a rental property decides to leave the rental business) to owner move-in evictions. Until additional construction of rental units occurs, the combination

of strong demand and low vacancies will contribute to create an increasingly severe shortage of rental units, decreasing their affordability.

Table 11 illustrates affordable rents by income category. In the case of an extremely low-income household of two people (for example, a single parent with a child), the annual income of $43,850 translates to a full-time job paying $21.08 per hour. In this scenario, the maximum rent they could afford would be approximately $1,096 per month–far below average rents in Belmont, even for studios. According to statistics on RentCafe.com, an online data aggregator, the average rent for an apartment was $2,401 as of June 2021, a decrease of 14% from the previous year but still much higher than what a lower-income household can afford. A household must earn at least $96,040 annually to afford the average rent.

TABLE 11: AFFORDABLE RENTS FOR TWO- AND THREE-PERSON HOUSEHOLDS

Income Category	Percent of Median	Income Limit (Two-Person Household)	Two-Person Affordable Rent	Income Limit (Three-Person Household)	Three-Person Affordable Rent
Extremely Low-income	30%	$43,850	$1,096	$49,350	$1,234
Very Low-income	50%	$73,100	$1,828	$82,250	$2,056
Low-income	80%	$117,100	$2,928	$131,750	$3,294
Median-income	100%	$119,700	$2,993	$134,650	$3,366
Moderate-income	120%	$143,600	$3,590	$161,550	$4,039

Notes: Affordable rents are calculated based on 30% of annual income divided by 12 months.
Source: State Department of Housing and Community Development and City of Belmont, 2021.

Through Section 8 and other housing programs, the Department of Housing and Community Development (HUD) provides rental housing assistance to lower-income households. According to HUD, 62 households in Belmont currently receive Section 8 rental assistance, in the form of Housing Choice Vouchers.

5.6 OVERPAYMENT AND OVERCROWDING

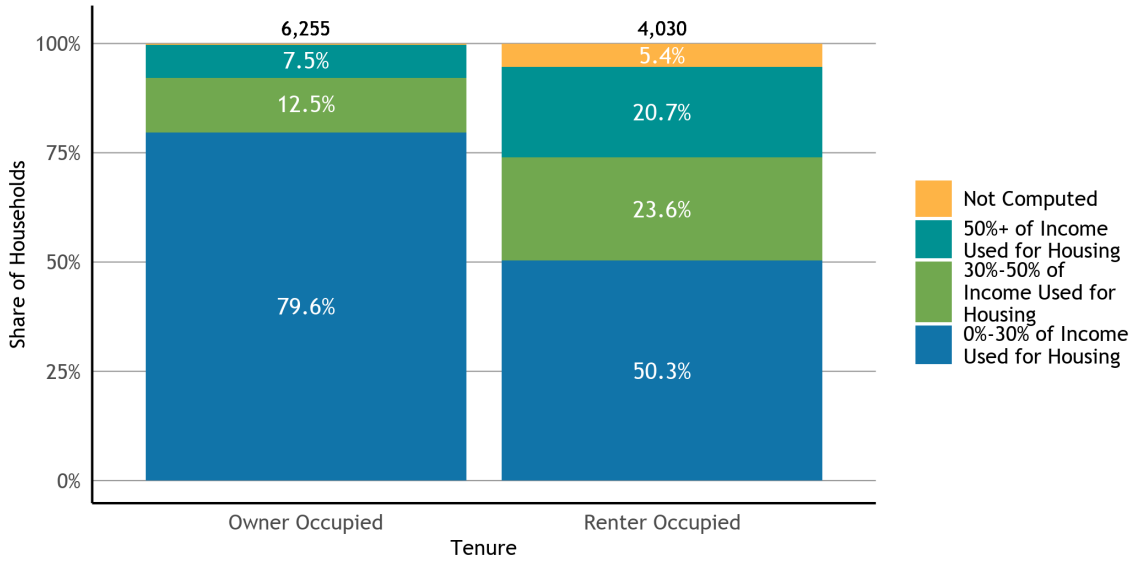
A household is considered "cost-burdened" if it spends more than 30% of its monthly income on housing costs, while those who spend more than 50% of their income on housing costs are considered "severely cost-burdened." Low-income residents are the most impacted by high housing costs and experience the highest rates of cost burden. Spending such large portions of their incomes on housing puts low-income households at higher risk of displacement, eviction, or homelessness.

Renters are often more cost-burdened than owners. While home prices have increased dramatically, homeowners often have mortgages with fixed rates, whereas renters are more likely to be impacted by ongoing market increases.

Looking at cost burden by tenure in Belmont, 23.6% of renters spend 30% to 50% of their income on housing compared to 12.5% of those who own (see Figure 29). In addition, 20.7% of

renters are severely cost-burdened (spending 50% or more of their income on housing), while only 7.5% of owners fall into this category.

Figure 29: Cost Burden by Tenure



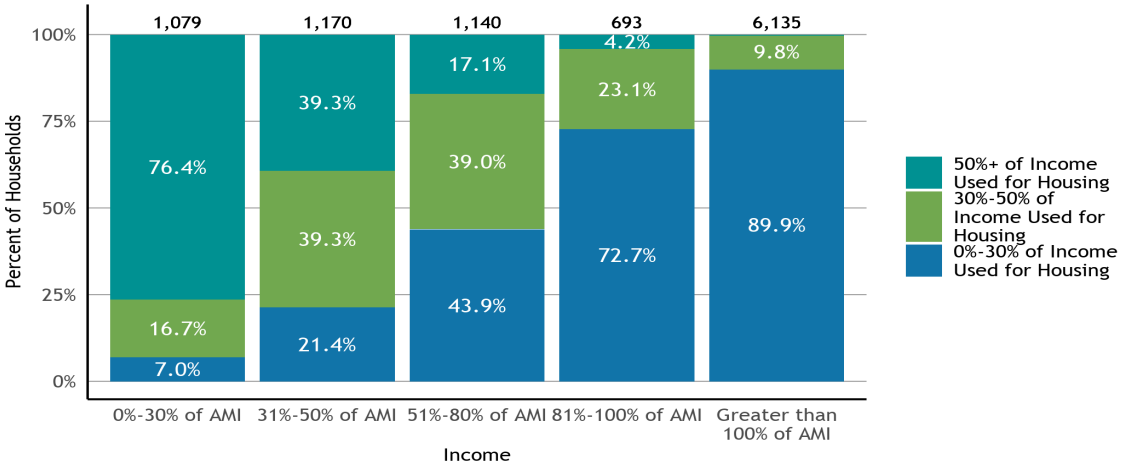
Universe: Occupied housing units.
Notes: Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes. HUD defines cost-burdened households as those whose monthly housing costs exceed 30% of monthly income, while severely cost-burdened households are those whose monthly housing costs exceed 50% of monthly income.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25070, B25091.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-06.

In Belmont, 15% of households spend 50% or more of their income on housing, while 18.1% spend 30% to 50% (see Figure 30). However, these rates vary greatly across income categories; for example, 76.4% of Belmont households making less than 30% of AMI spend most of their income on housing. For Belmont residents making more than 100% of AMI, just 0.3% are severely cost-burdened, and 89.9% of those making more than 100% of AMI spend less than 30% of their income on housing.

Currently, people of color are more likely to experience poverty and financial instability because of federal and local housing policies that have historically excluded them from the same opportunities extended to White residents. As a result, they often spend a greater percentage of their income on housing and are at a greater risk of housing insecurity.

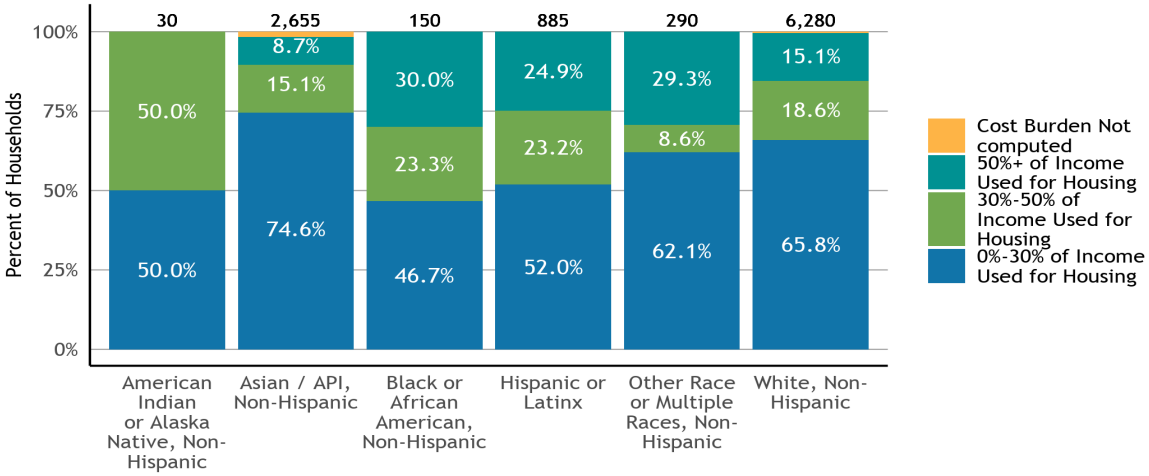
American Indian or Alaska Native, Non-Hispanic residents are the most cost burdened with 50.0% spending 30% to 50% of their income on housing, and *Black or African American, Non-Hispanic* residents are the most severely cost burdened with 30% spending more than 50% of their income on housing (see Figure 31).

Figure 30: Cost Burden by Income Level



Universe: Occupied housing units.
Notes: Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes. HUD defines cost-burdened households as those whose monthly housing costs exceed 30% of monthly income, while severely cost-burdened households are those whose monthly housing costs exceed 50% of monthly income. Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-05.

Figure 31: Cost Burden by Race



Universe: Occupied housing units.
Notes: Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes. HUD defines cost-burdened households as those whose monthly housing costs exceed 30% of monthly income, while severely cost-burdened households are those whose monthly housing costs exceed 50% of monthly income. For the purposes of this graph, the "Hispanic or Latinx" racial/ethnic group represents those who identify as having Hispanic/Latinx ethnicity and may also be members of any racial group. All other racial categories on this graph represent those who identify with that racial category and do not identify with Hispanic/Latinx ethnicity.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-08.

Cost burden by tenure and income category reveals the extent to which lower-income groups, especially renters, pay too much for housing costs. Table 12 below provides data on extremely low-, very low, and low-income households compared with higher-income groups. Both extremely low-income renters and owners have high rates of cost burden, as do other lower-income groups. However, overall, owners are much less impacted by cost burdens than renters: in total, 18% of owners have a cost burden of more than 30%, and only 8% have burdens over 50%. By contrast, 42% of all renters have a cost burden of more than 30%, and 20% have the severe cost burden of over 50%. Although renters account for about 39% of all households, they represent more than 60% of cost-burdened households.

Large family households often have special housing needs due to a lack of adequately sized affordable housing. The higher costs required for homes with multiple bedrooms can result in larger families experiencing a disproportionate cost burden when compared to the rest of the population, increasing their risk of housing insecurity.

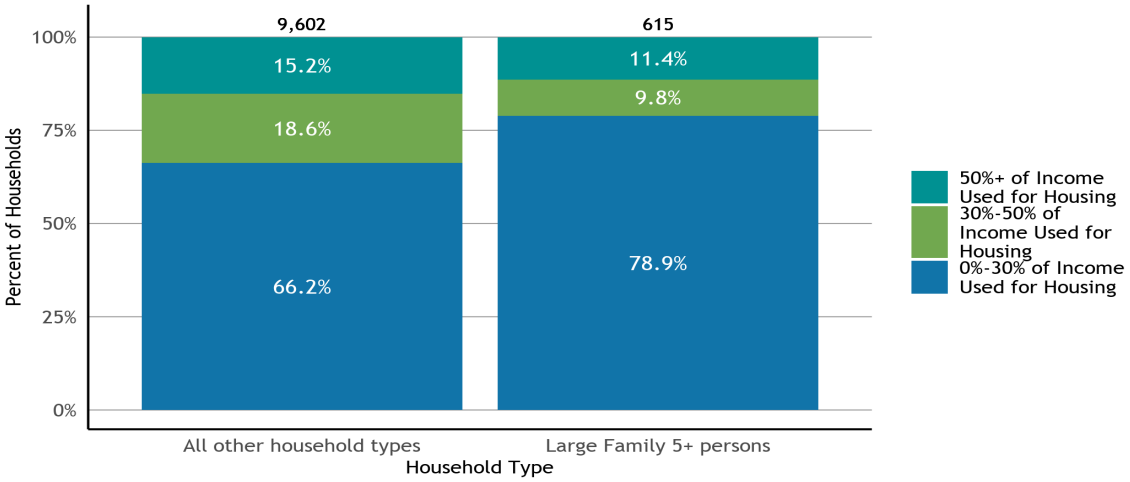
In Belmont, 9.8% of large family households experience a cost burden of 30% to 50%, while 11.4% of households spend more than half of their income on housing (see Figure 32). Approximately 18.6% of all other households have a cost burden of 30% to 50%, with 15.2% of households spending more than 50% of their income on housing.

TABLE 12: COST BURDEN BY TENURE AND INCOME

Income by Cost Burden (Renters Only)	Cost Burden > 30%	Cost Burden > 50%	Total
Household Income <= 30% HAMFI	555	425	785
Household Income >30% to <=50% HAMFI	585	315	625
Household Income >50% to <=80% HAMFI	375	65	775
Household Income >80% to <=100% HAMFI	120	0	385
Household Income >100% HAMFI	70	0	1,455
Total	**1,705**	**805**	**4,030**
Income by Cost Burden (Owners only)			
Household Income <= 30% HAMFI	255	205	360
Household Income >30% to <=50% HAMFI	165	105	410
Household Income >50% to <=80% HAMFI	190	100	550
Household Income >80% to <=100% HAMFI	195	45	505
Household Income >100% HAMFI	315	15	4,435
Total	**1,120**	**470**	**6,255**

Source: CHAS Databook, https://www.huduser.gov/portal/datasets/cp.html.

Figure 32: Cost Burden by Household Size



Universe: Occupied housing units.
Notes: Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes. HUD defines cost-burdened households as those whose monthly housing costs exceed 30% of monthly income, while severely cost-burdened households are those whose monthly housing costs exceed 50% of monthly income.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-09.

When cost-burdened seniors are no longer able to make house payments or pay rents, displacement from their homes can occur, placing further stress on the local rental market or forcing residents out of the community they call home. Understanding how seniors might be cost-burdened is of particular importance due to their special housing needs, particularly for low-income seniors.

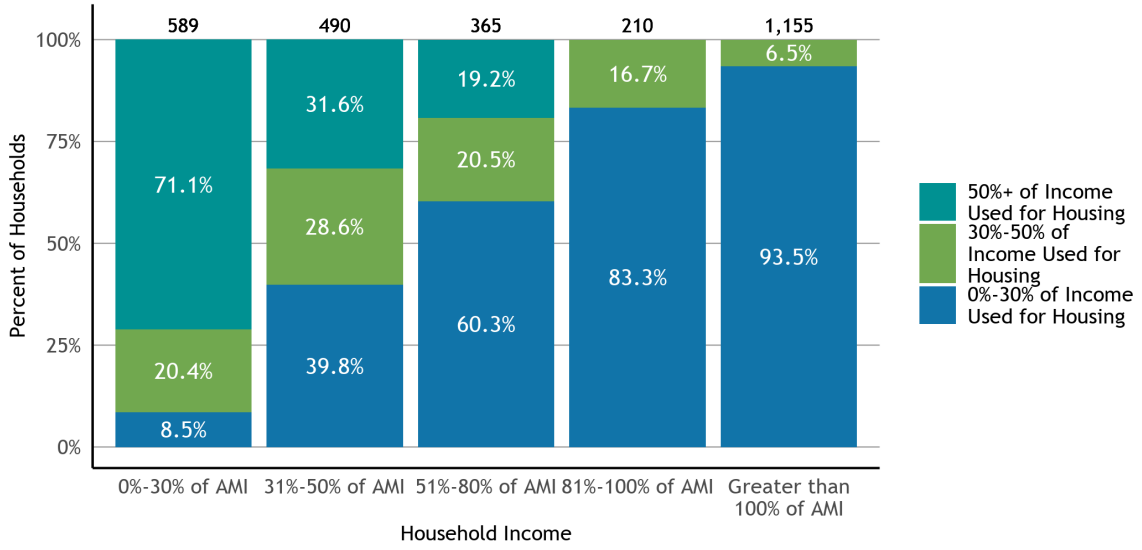
71.1% of seniors making less than 30% of AMI are spending most of their income on housing (see Figure 33). For seniors making more than 100% of AMI, 93.5% are not cost-burdened and spend less than 30% of their income on housing.

Overcrowding occurs when the number of people living in a household is greater than the home was designed to hold. There are several different standards for defining overcrowding, but this report uses the Census Bureau definition, which is more than one occupant per room (not including bathrooms or kitchens). Additionally, the Census Bureau considers units with more than 1.5 occupants per room to be severely overcrowded.

Overcrowding is often related to the cost of housing and can occur when demand in a city or region is high. In many cities, overcrowding is seen more amongst those who are renting, with multiple households sharing a unit to make it possible to stay in their communities.

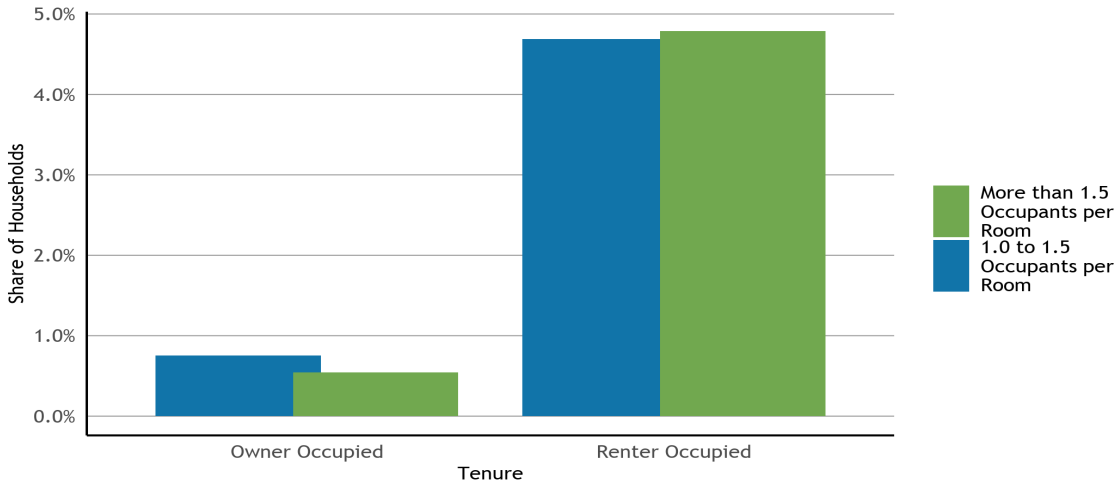
In Belmont, 4.8% of households that rent are severely overcrowded (more than 1.5 occupants per room), compared to 0.5% of households that own (see Figure 34). 4.7% of renters experience moderate overcrowding (1 to 1.5 occupants per room), compared to 0.8% for those who own.

Figure 33: Cost-Burdened Senior Households by Income Level



Universe: Senior households.
Notes: For the purposes of this graph, senior households are those with a householder who is aged 62 or older. Cost burden is the ratio of housing costs to household income. For renters, housing cost is gross rent (contract rent plus utilities). For owners, housing cost is "select monthly owner costs", which includes mortgage payment, utilities, association fees, insurance, and real estate taxes. HUD defines cost-burdened households as those whose monthly housing costs exceed 30% of monthly income, while severely cost-burdened households are those whose monthly housing costs exceed 50% of monthly income. Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table SEN-03.

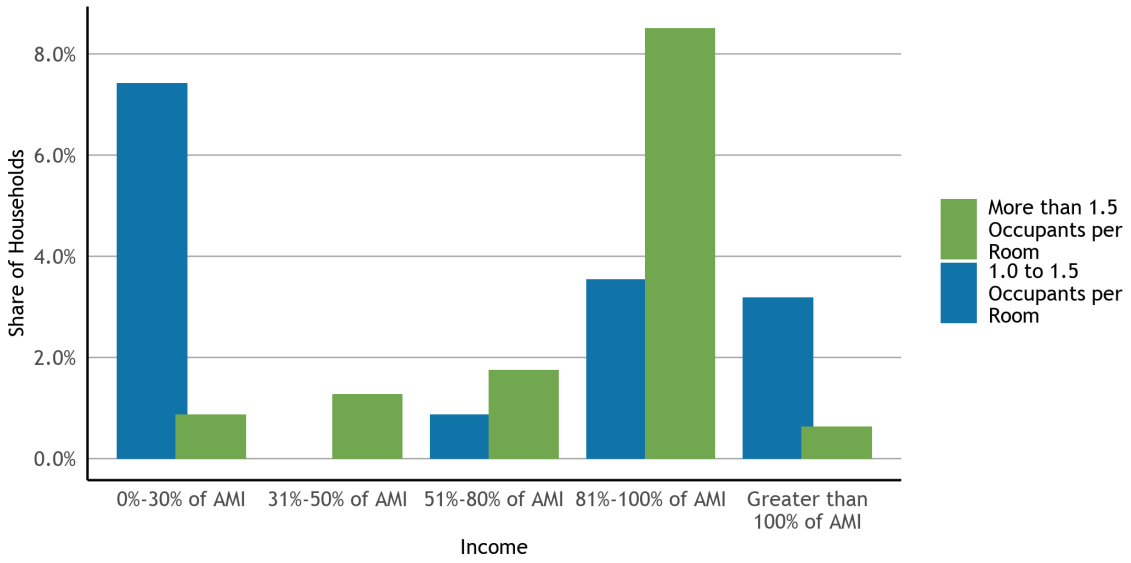
Figure 34: Overcrowding by Tenure and Severity



Universe: Occupied housing units.
Notes: The Census Bureau defines an overcrowded unit as one occupied by 1.01 persons or more per room (excluding bathrooms and kitchens), and units with more than 1.5 persons per room are considered severely overcrowded.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-01.

Overcrowding often disproportionately impacts low-income households. 0.9% of very low-income households (below 50% AMI) experience severe overcrowding, while 0.6% of households above 100% experience this level of overcrowding (see Figure 35).

Figure 35: Overcrowding by Income Level and Severity

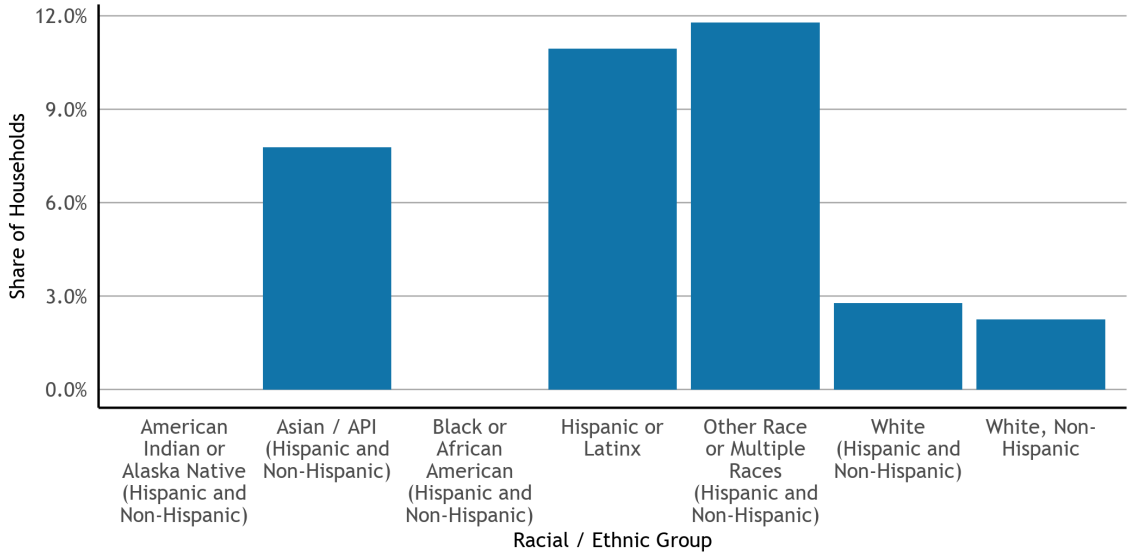


Universe: Occupied housing units.
Notes: The Census Bureau defines an overcrowded unit as one occupied by 1.01 persons or more per room (excluding bathrooms and kitchens), and units with more than 1.5 persons per room are considered severely overcrowded. Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-04.

Communities of color are more likely to experience overcrowding as well as poverty, financial instability, and housing insecurity. People of color tend to experience overcrowding at higher rates than White residents.

In Belmont, the racial group with the largest rate of overcrowding is *Other Race or Multiple Races (Hispanic and Non-Hispanic)* (see Figure 36).

Figure 36: Overcrowding by Race



Universe: Occupied housing units.
Notes: The Census Bureau defines an overcrowded unit as one occupied by 1.01 persons or more per room (excluding bathrooms and kitchens), and units with more than 1.5 persons per room are considered severely overcrowded. For this table, the Census Bureau does not disaggregate racial groups by Hispanic/Latinx ethnicity. However, data for the white racial group is also reported for white householders who are not Hispanic/Latinx. Since residents who identify as white and Hispanic/Latinx may have very different experiences within the housing market and the economy from those who identify as white and non-Hispanic/Latinx, data for multiple white sub-groups are reported here. The racial/ethnic groups reported in this table are not all mutually exclusive. Therefore, the data should not be summed as the sum exceeds the total number of occupied housing units for this jurisdiction. However, all groups labelled "Hispanic and Non-Hispanic" are mutually exclusive, and the sum of the data for these groups is equivalent to the total number of occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25014.
For the data table behind this figure, please refer to the Data Packet Workbook, Table OVER-03.

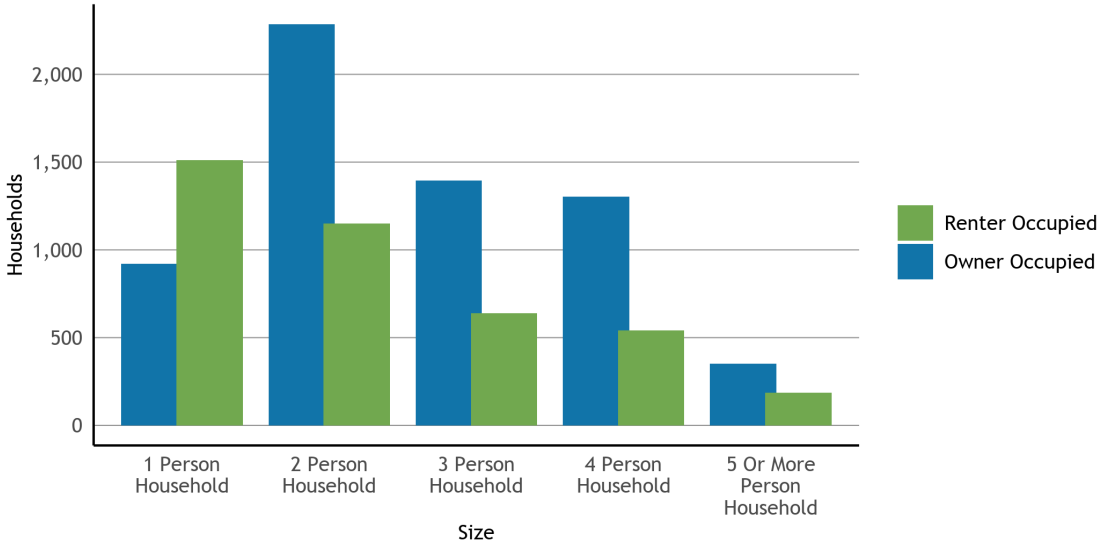
6. Special Housing Needs

6.1 Large Households

Large households often have different housing needs than smaller households. If a city's rental housing stock does not include larger apartments, large households that rent could end up living in overcrowded conditions.

In Belmont, for large households with five or more people, most units (65.2%) are owner-occupied (see Figure 37). In 2017, 13.8% of large households were very low-income, earning less than 50% of the area median income (AMI).

Figure 37: Household Size by Tenure

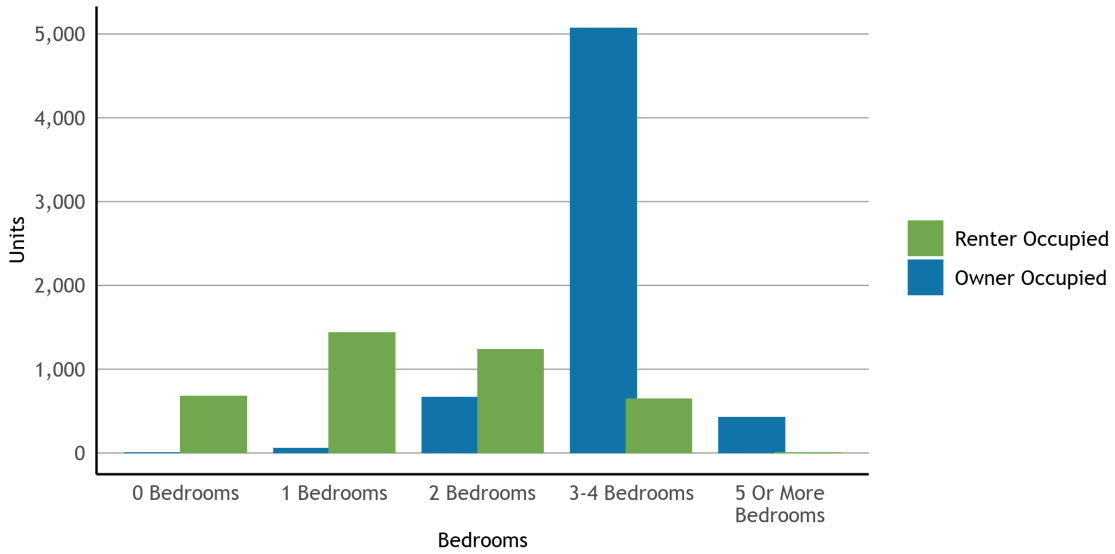


Universe: Occupied housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25009.
For the data table behind this figure, please refer to the Data Packet Workbook, Table LGFEM-01.

In addition to overcrowding, large households also often have a cost burden. In Belmont, most large households paying too much for housing are lower-income households. Although this is principally because there are very few large renter households, there are disproportionately fewer large renter households than large owner-occupied households.

The unit sizes available in a community affect the household sizes that can access that community. Large families are generally served by housing units with three or more bedrooms, of which there are 6,175 units in Belmont. Among these large units with three or more bedrooms, 10.8% are renter-occupied while 89.2% are owner occupied (see Figure 38).

Figure 38: Housing Units by Number of Bedrooms



Universe: Housing units.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25042.
For the data table behind this figure, please refer to the Data Packet Workbook, Table HSG-05.

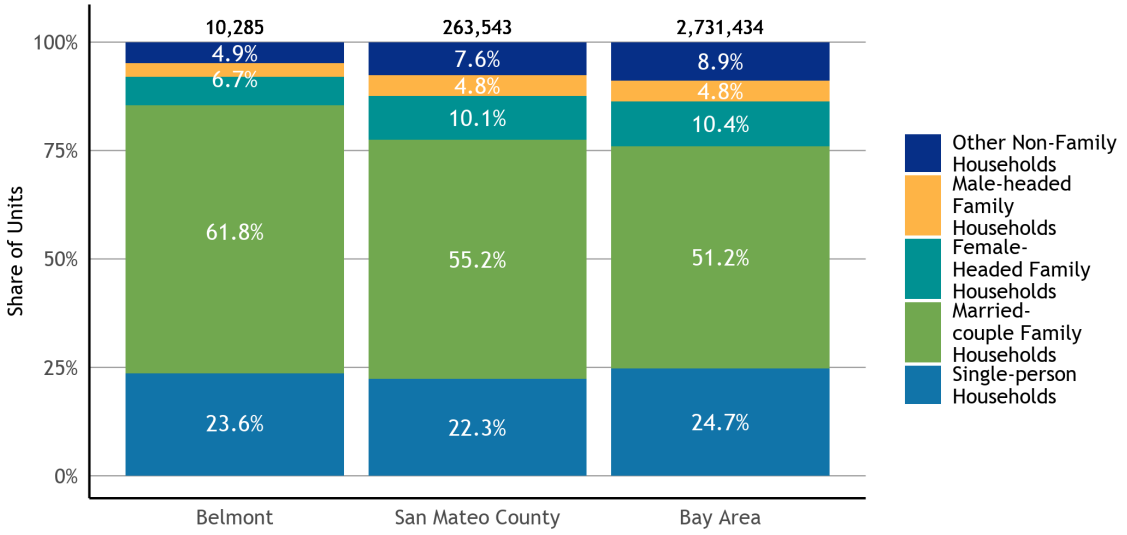
RESOURCES FOR LARGE HOUSEHOLDS

Finding rental housing with more than two bedrooms is a typical problem for large families, particularly renters with lower income levels. Of the approximately 6,175 housing units in Belmont with three or more bedrooms, only 10.8% (665) are occupied by renters. Due to the limited supply of adequately-sized rental units and affordable homeownership opportunities to accommodate large family households, large families face additional difficulty in locating housing that is adequately sized and affordably priced. While Belmont has a large proportion of housing units with three or more bedrooms, the issue is with mismatch between availability and affordability. The Housing Choice Voucher is one program that can assist very low-income large renter-households in accessing adequately sized housing.

6.2 FEMALE-HEADED HOUSEHOLDS

Households headed by one person are often at a greater risk of housing insecurity. This is particularly true of female-headed households, where the female may be supporting children or other family with a single income. In Belmont, the largest proportion of households is *Married-couple Family Households* (61.8%), while *Female-Headed Households* make up 6.7% of households.

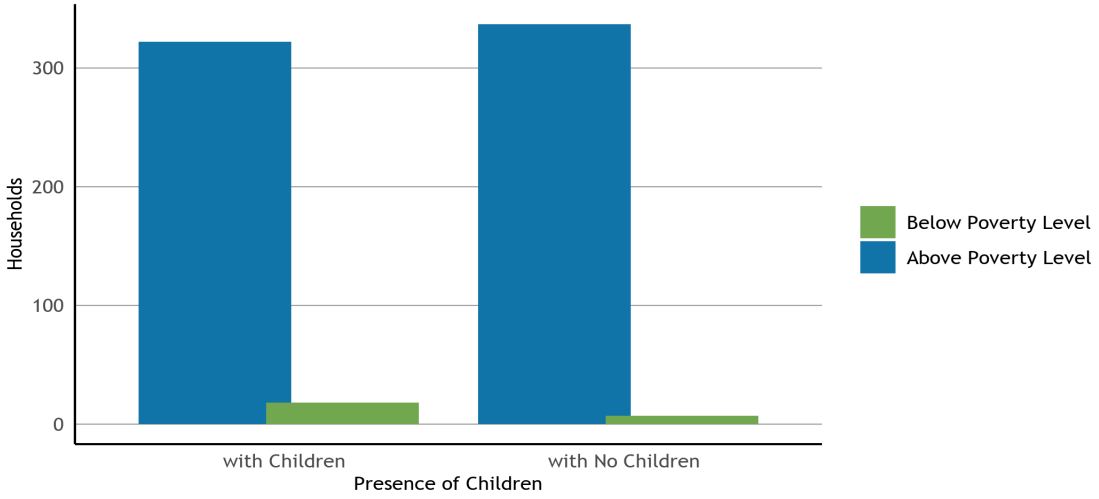
Figure 39: Household Type



Universe: Households.
Notes: For data from the Census Bureau, a "family household" is a household where two or more people are related by birth, marriage, or adoption. "Non-family households" are households of one person living alone, as well as households where none of the people are related to each other.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B11001.
For the data table behind this figure, please refer to the Data Packet Workbook, Table POPEMP-23.

Female-headed households with children may face elevated housing challenges, with pervasive gender inequality resulting in lower wages for women. Moreover, the added need for childcare can make finding a home that is affordable more challenging. In Belmont, 5.3% of female-headed households with children fall below the Federal Poverty Line, while 2.0% of female-headed households without children live in poverty (see Figure 40).

Figure 40: Female-Headed Households by Poverty Status



Universe: Female households.
Notes: The Census Bureau uses a federally defined poverty threshold that remains constant throughout the country and does not correspond to Area Median Income.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B17012.
For the data table behind this figure, please refer to the Data Packet Workbook, Table LGFEM-05.

The 2015-2019 American Community Survey showed that single parents comprised approximately 9.7% of Belmont households. Of these, the vast majority were female-headed, single-parent households (68.3% of single-parent households). Female-headed families have a higher incidence of poverty when compared to all households and are more likely renters than owners. Of the female headed households in Belmont, 57.6% were renters.

RESOURCES FOR SINGLE PARENT HOUSEHOLDS

Female-headed households often need affordable housing in areas suitable for child-rearing and with access to transit networks, schools, parks, and daily services. The City will also be looking at developing a policy for affirmative marketing to lower-income special needs groups, which may involve a preference system for below market rate (BMR) units to ensure special needs groups are given opportunities to access housing that is affordable to them.

6.3 SENIORS

Senior households often experience a combination of factors that can make accessing or keeping affordable housing a challenge. They often live on fixed incomes and are more likely to have disabilities, chronic health conditions, and reduced mobility.

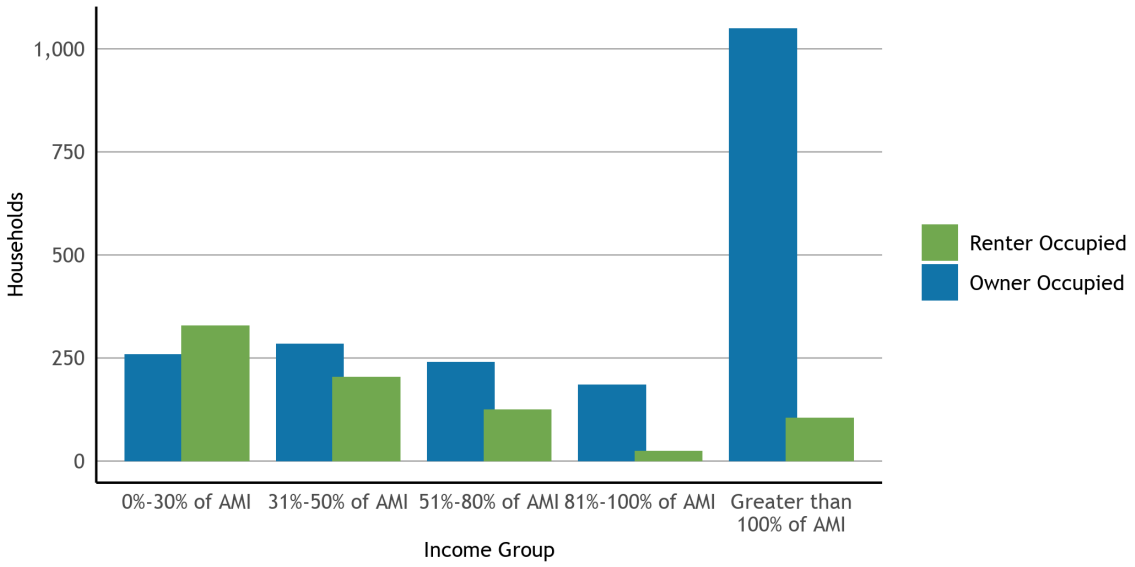
Seniors who rent may be at an even greater risk for housing challenges than those who own, due to income differences between these groups. The largest proportion of senior households who rent make *0%-30% of AMI*, while the largest proportion of senior households who are homeowners falls in the income group *Greater than 100% of AMI* (see Figure 41).

According to American Community Survey 5-year data (2015-2019), of the approximately 10,285 households in Belmont, 2,809 or 27.3% are senior households. While many earn incomes over 100% of median income, a significant percentage earns lower incomes. Approximately 1,444 senior households earn incomes less than 80% of median, or about 51%. Of the lower-income households, 54.4% are homeowners and 45.6% are renters.

Cost burden is prevalent amongst elderly households, especially those earning the lowest incomes. For example, although extremely low-income senior households represent 21% of total senior households, they represent more than 49.5% of senior households with a cost burden. Of all senior households, 445 (15.8%) are cost-burdened, and 644 (22.9%) are severely cost-burdened.

Aside from overpayment problems faced by seniors due to their relatively fixed incomes, many seniors are faced with various disabilities. Among all disabilities, the most common are ambulatory disabilities (14.4%), independent living disabilities (10.5%), and hearing disabilities (9.4%).

Figure 41: Senior Households by Income and Tenure



Universe: Senior households.
Notes: For the purposes of this graph, senior households are those with a householder who is aged 62 or older. Income groups are based on HUD calculations for Area Median Income (AMI). HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County). The AMI levels in this chart are based on the HUD metro area where this jurisdiction is located.
Source: U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.
For the data table behind this figure, please refer to the Data Packet Workbook, Table SEN-01.

RESOURCES FOR SENIORS

Housing resources available for seniors include senior apartments and residential care facilities for the elderly (RCFE). Residential facilities such as assisted living or board and care facilities are non-medical facilities that provide a level of care that includes assistance with activities of daily living. RCFEs provide room, board, housekeeping, supervision, and personal care assistance with basic activities like personal hygiene, dressing, eating, and walking for persons 60 years and older. According to the State Department of Social Services (CDSS), Belmont has 297 beds in 11 licensed RCFEs.

In addition to funding programs that serve seniors, the County also provides information on a wide variety of services to seniors. These include, but are not limited to:

211BAYAREA.ORG

211 provides free and confidential information and referrals. Call 2-1-1 for help with food, housing, employment, health care, counseling, and more. 211 in San Mateo County can help locate food, housing, health care, senior services, childcare, legal aid, and much more.

SAN MATEO COUNTY AGING AND ADULT SERVICES

San Mateo County Aging and Adult provides a wide range of services to keep seniors, people with disabilities, and dependent adults living safely and as independently as possible in the community.

SAN MATEO COUNTY NETWORK OF CARE

San Mateo County Network of Care is a website sponsored by San Mateo County and providing information on a wide array of services for seniors and persons with disabilities.

T.I.E.S. (COUNTY OF BELMONT)

Phone Hotline 1-800-675-8437 Teamwork Insuring Elderly Support (T.I.E.S.) provides general information on all senior services. TIES features a 24-hour hotline and is designed to assist vulnerable elderly and dependent adults who need help but may be unable to get it for themselves.

HELP AT HOME

Help at Home is a mini-reference guide published by the San Mateo County Commission on Aging. This guide contains a wide variety of information designed to assist San Mateo County adults of all incomes to remain safely in their homes.

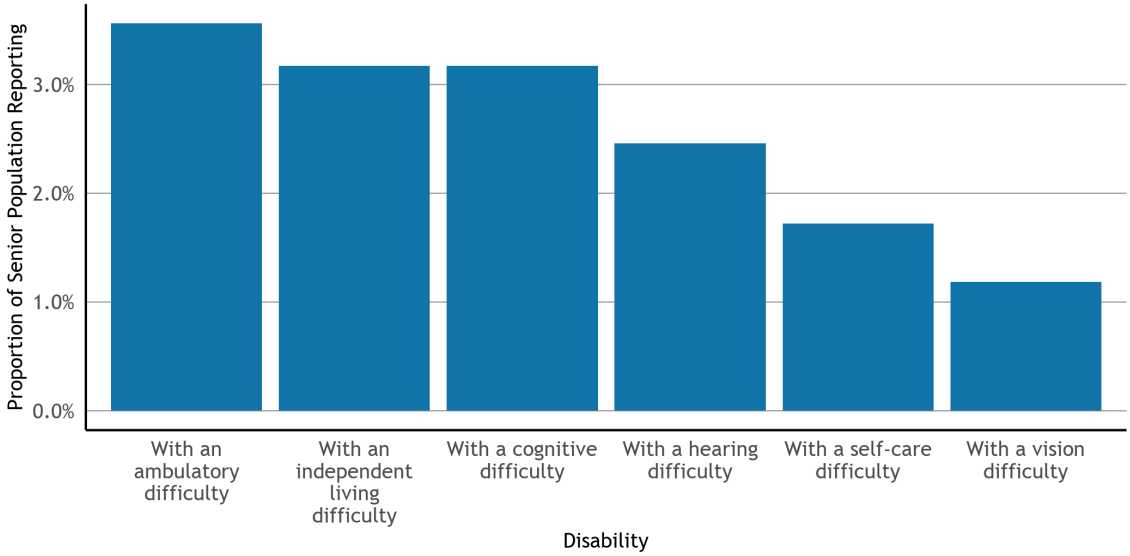
6.4 PEOPLE WITH DISABILITIES

People with disabilities face additional housing challenges. Encompassing a broad group of individuals living with a variety of physical, cognitive, and sensory impairments, many people with disabilities live on fixed incomes and need specialized care, yet often rely on family members for assistance due to the high cost of care.

When it comes to housing, people with disabilities are not only in need of affordable housing but accessibly designed housing, which offers greater mobility and opportunity for independence. Unfortunately, this need typically outweighs availability, particularly in a housing market with such high demand. People with disabilities are at a high risk for housing insecurity, homelessness, and institutionalization, particularly when they lose aging caregivers. Figure 42 shows the rates at which different disabilities are present among residents of Belmont. Overall, 9% of people in Belmont have a disability of any kind.[21]

[21] These disabilities are counted separately and are not mutually exclusive, as an individual may report more than one disability. These counts should not be summed.

Figure 42: Disability by Type



Universe: Civilian noninstitutionalized population 18 years and over.
Notes: These disabilities are counted separately and are not mutually exclusive, as an individual may report more than one disability. These counts should not be summed. The Census Bureau provides the following definitions for these disability types: Hearing difficulty: deaf or has serious difficulty hearing. Vision difficulty: blind or has serious difficulty seeing even with glasses. Cognitive difficulty: has serious difficulty concentrating, remembering, or making decisions. Ambulatory difficulty: has serious difficulty walking or climbing stairs. Self-care difficulty: has difficulty dressing or bathing. Independent living difficulty: has difficulty doing errands alone such as visiting a doctor's office or shopping.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B18102, Table B18103, Table B18104, Table B18105, Table B18106, Table B18107. For the data table behind this figure, please refer to the Data Packet Workbook, Table DISAB-01.

In Belmont and elsewhere, persons with disabilities have a wide range of different housing needs, which vary depending on the type and severity of the disability as well as personal preference and lifestyle. Physical, mental, and/or developmental disabilities may prevent a person from working, restrict one's mobility, or make it difficult to care for oneself. "Barrier-free design" housing, accessibility modifications, proximity to services and transit, and group living opportunities represent some of the types of considerations and accommodations that are important in serving this group. Also, some residents suffer from disabilities that require living in a supportive or institutional setting.

Resources for Persons with Disabilities

In addition to housing and community development programs provided by the City, San Mateo County provides a variety of services and information for older adults and people with disabilities through its Network of Care efforts. Its website contains links to service providers on the following topics.

In addition, the Center for Independence of Individuals with Disabilities (CID) is a private, nonprofit corporation located in San Mateo, California. Incorporated in 1979, CID is a consumer-driven, community-based, services and advocacy organization serving San Mateo County and beyond. By federal mandate, the majority of its Staff, Management, and Board of Directors

consists of people with disabilities. Annually, CID provides direct and indirect services to more than 2,000 individuals with disabilities.

CID is one of 29 Independent Living Centers in the State of California and over 400 Independent Living Centers in the United States. It is affiliated with other ILCs through its membership and participation in the California Foundation of Independent Living Centers and the National Council of Independent Living. CID is affiliated with other nonprofit agencies through its membership in the California Association of Non-Profits.

CID services include Housing Accessibility Modification (HAM), which involves installing grab bars, rails, ramps, hand-held showers, etc. for low-income San Mateo County residents. It also provides Peer Counseling (individual and group) by licensed, trained persons with disabilities, and Financial Benefits Counseling (regarding applications or appeals for SSI, SSDI, or MediCal). The Assistive Technology (AT) Program is designed to educate and train the public concerning technology that can assist people with disabilities. CID maintains an information database of community resources and have links to the California statewide AT Network in Sacramento.

State law also requires Housing Elements examine the housing needs of people with developmental disabilities. People with developmental disabilities have a disability that emerged before age 18, is expected to be lifelong, and is of sufficient severity to require a coordinated program of services and support to live successfully in the community. Developmental disabilities include intellectual disability, autism, Down Syndrome, epilepsy, cerebral palsy, and other disabling conditions similar in their functional impact to an intellectual disability. Under California's Developmental Disabilities Services Act and the U.S. Supreme Court's 1999 decision in *Olmstead v. L.C.,* people with developmental disabilities are entitled to receive community-based services that allow them to live in the least restrictive community setting. This shift to de-institutionalization has led to the closure of the most restrictive segregated settings and to the requirement that local jurisdictions in their Housing Elements assess and plan specifically for the housing needs of people with developmental disabilities who receive services from the Regional Center to live in their home community.

Many developmentally disabled persons can live and work independently within a conventional housing environment. More severely disabled individuals require a group living environment where supervision is provided. The most severely affected individuals may require an institutional environment where medical attention and physical therapy are provided. Because developmental disabilities exist before adulthood, the first issue in supportive housing for the developmentally disabled is the transition from the person's living situation as a child to an appropriate level of independence as an adult.

The family home is the most prevalent living arrangement for Belmont's adults with developmental disabilities, with 35% of adults living in the family home in 2021, lower than the San Mateo County average of 56%. Belmont has a higher percentage of adults living in their own apartment than San Mateo County because of the presence of a 24-unit HUD 811 apartment complex specifically for people with developmental disabilities, which accounts for many of the adults with developmental disabilities now living independently.

In Belmont, of the population with a developmental disability, children under the age of 18 make up 31.1%, while adults account for 68.9%.

TABLE 13: POPULATION WITH DEVELOPMENTAL DISABILITIES BY AGE

Age Group	Number
Age 18+	111
Age Under 18	50

Universe: Population with developmental disabilities.
Notes: The California Department of Developmental Services is responsible for overseeing the coordination and delivery of services to more than 330,000 Californians with developmental disabilities including cerebral palsy, intellectual disability, Down syndrome, autism, epilepsy, and related conditions. The California Department of Developmental Services provides ZIP code level counts. To get jurisdiction-level estimates, ZIP code counts were cross-walked to jurisdictions using census block population counts from Census 2010 SF1 to determine the share of a ZIP code to assign to a given jurisdiction.
Source: California Department of Developmental Services, Consumer Count by California ZIP Code and Age Group (2020).
This table is included in the Data Packet Workbook as Table DISAB-04.

Access to deeply affordable rents coordinated with on-site supportive services provided by the Golden Gate Regional Center (such as found in Belmont's single HUD 811 apartment property) is critical to helping Belmont adults with developmental disabilities remain stably housed in high-cost San Mateo County.

TABLE 14: POPULATION WITH DEVELOPMENTAL DISABILITIES BY RESIDENCE

Residence Type	Number
Home of Parent /Family /Guardian	88
Independent /Supported Living	35
Community Care Facility	29
Other	5
Foster /Family Home	5
Intermediate Care Facility	5

Universe: Population with developmental disabilities.
Notes: The California Department of Developmental Services is responsible for overseeing the coordination and delivery of services to more than 330,000 Californians with developmental disabilities including cerebral palsy, intellectual disability, Down syndrome, autism, epilepsy, and related conditions. The California Department of Developmental Services provides ZIP code level counts. To get jurisdiction-level estimates, ZIP code counts were cross-walked to jurisdictions using census block population counts from Census 2010 SF1 to determine the share of a ZIP code to assign to a given jurisdiction.
Source: California Department of Developmental Services, Consumer Count by California ZIP Code and Residence Type (2020).
This table is included in the Data Packet Workbook as Table DISAB-05.

According to Housing Choices, a nonprofit organization that has supported people with developmental disabilities find and retain affordable housing in their communities for 25 years in San Mateo County, there are several statistics that have impacted the need for housing to support this population. These include the following.

Increase of Autism Diagnosis Reflected in Increase in Adults in their 20s and 30s. Growth in the Belmont adult population with developmental disabilities correlates with a significant

annual increase in the diagnosis of autism that began in the mid-1980s and did not level out until after 2015. The cumulative impact of this trend is already seen in the growth in the San Mateo County population age 18 to 41 with developmental disabilities.

TABLE 15: GROWTH IN POPULATION OF SAN MATEO COUNTY ADULTS WITH DEVELOPMENTAL DISABILITIES

Age Band	2015 Number	2021 Number	% Change
18 to 31	1,023	1,189	16%
32 to 41	397	457	15%
41 to 52	382	335	-12%
52 to 61	385	348	-10%
62 plus	327	435	33%
Total Adults	**2,514**	**2,764**	**10%**

Longer Life Spans. The California Department of Developmental Services reports that the number of San Mateo County residents with developmental disabilities age 62 and older grew by 33% between September 2015 and June 2021. With longer life expectancies, more adults with developmental disabilities will outlive their parents and family members who are the single largest source of housing for adults with developmental disabilities in Belmont. Longer life spans also slow the pace of resident turnover in the County's shrinking supply of licensed care facilities, which further reduces opportunities for people with developmental disabilities to secure a space in a licensed care facility.

Decline in Licensed Care Facilities. The California Department of Developmental Services reports that between September 2015 and June 2021, San Mateo County lost 5% of its supply of licensed care facilities for people with developmental disabilities (including Community Care Facilities, Intermediate Care Facilities, and Skilled Nursing Facilities). The greatest contributing factor to this loss of supply is the high cost of housing making it more financially beneficial for retiring owners to sell the facilities as residences rather than as a business, thereby increasing the need for affordable housing options coordinated with supportive services funded by the Golden Gate Regional Center.

Displacement. The California Department of Developmental Services has documented a 12% decline in the age group 42 to 51 and a 10% decline in the age group 52 to 61 in San Mateo County between September 2015 and June 2021. Considering gains in life expectancy, this loss can reasonably be attributed to displacement from the County because of the lack of residential living options (either licensed facilities or affordable housing) when an elderly parent caregiver passes away or becomes unable to house and care for the adult. Displacement takes a particular toll on adults with developmental disabilities who depend on familiarity with transit routes, shopping, and services, as well as support from community-based services and informal networks built up over years of living in Belmont. In February 2022, the City of Belmont adopted a Housing Preference Policy that was structured to address housing displacement. The

preference policy offers priority for publicly funded affordable units to people who live or work in San Mateo County, and to people who have been displaced from a San Mateo County housing unit in the last three years.

Higher Rates of Physical Disabilities. People with developmental disabilities are more likely than the general population to have an accompanying physical disability. Twenty-seven percent (27%) of San Mateo County residents with developmental disabilities have limited mobility and 13% have a vision or hearing impairment. The need for an accessible unit coupled with the need for coordinated supportive services compounds the housing barriers faced by those with co-occurring intellectual and physical disabilities.

Ineligibility for Many Affordable Rental Units. Some adults with developmental disabilities depend on monthly income of around $1,000 from the Supplemental Security Income (SSI) program, pricing them out of even the limited number of extremely low-income affordable housing units in Belmont. Those with employment tend to work part-time in the lowest paid jobs and struggle to income-qualify for many of the affordable housing units for rent in Belmont.

Transit-Dependent. Most adults with developmental disabilities do not drive or own a car and rely on public transit to integrate into the larger community.

RESOURCES FOR PERSONS WITH DEVELOPMENTAL DISABILITIES

Services for persons with disabilities are typically provided by both public and private agencies. State and Federal legislation regulate the accessibility and adaptability of new or rehabilitated multi-family apartment complexes to ensure accommodation for individuals with limited physical mobility. Housing options for persons with disabilities include various community care facilities. Many individuals continue to live with parents.

Housing Choices (HC) is a nonprofit that advocates for the housing needs of people with developmental disabilities. It is committed to educating local elected officials, City and County housing staff, and housing developers about the opportunity to plan for and include people with developmental and other disabilities in their local housing plans. It supports and promotes the voices of people with developmental and other disabilities and encourages them to become effective self-advocates. Along with clients, their parents, and other members of the community, HC frequently attends and testifies at City Council and other relevant meetings with the goal of creating cities and neighborhoods which are inclusive of people with developmental and other disabilities.

The single largest component of HC's work is helping individuals with developmental and other disabilities find housing that suits their specific needs and priorities. Every year, their Housing Coordinators help more than 1,800 people with developmental and other disabilities create a housing plan and apply for affordable housing.

Each client has unique housing needs, constraints, and preferences. When a person is referred to Housing Choices, a Housing Coordinator helps to create an individual housing plan with input

from the individual with disabilities and everyone in that person's "Circle of Support." Housing Coordinators help clients with their decision-making by discussing their finances, credit history, supportive service needs, household composition, and other background relevant to their housing choices. HC helps its clients identify and apply for rental properties for which they can income-qualify and that are in the right location. Depending on each person's income and existing support network, this could involve applying for multiple waiting lists and monitoring waiting list statuses for several years.

The Golden Gate Regional Center (GGRC), noted above, provides services and support to individuals with developmental disabilities in Marin, San Francisco, and San Mateo Counties. A resident of Marin, San Francisco, or San Mateo Counties who falls into any of the following four categories is eligible for GGRC services.

- Is an individual with a developmental disability
- Is an infant or toddler (up to 36 months of age) who has a developmental delay
- Is an infant or toddler (up to 36 months of age) for whom there are established risk conditions that could lead to a developmental delay
- Is an infant or toddler (up to 36 months of age) at high risk of having a development disability due to a combination of biomedical factors

Individuals eligible under the first category are served by GGRC's Lanterman Act services program; infants and toddlers eligible under the latter three categories are served by the regional center's Early Start program.

There are several housing types appropriate for people living with a development disability: rent subsidized homes, licensed and unlicensed single-family homes, inclusionary housing, Section 8 vouchers, special programs for home purchase, HUD housing, and permanent supportive housing (PSH). The design of housing-accessibility modifications, the proximity to services and transit, and the availability of group living opportunities represent some of the types of considerations that are important in serving this need group. Incorporating "barrier-free" design in all, new multi-family housing (as required by California and Federal Fair Housing laws) is especially important to provide the widest range of choices for disabled residents. Special consideration should also be given to the affordability of housing, as people with disabilities may be living on a fixed income.

6.5 HOMELESSNESS

Homelessness remains an urgent challenge in many communities across the State, reflecting a range of social, economic, and psychological factors. Rising housing costs result in increased risks of community members experiencing homelessness. Far too many residents who have found themselves housing insecure have ended up unhoused or homeless in recent years, either temporarily or longer term. Addressing the specific housing needs for the unhoused population remains a priority throughout the region, particularly since homelessness is disproportionately

experienced by people of color, people with disabilities, those struggling with addiction, and those dealing with traumatic life circumstances.

The San Mateo County Human Services Agency (HSA), in close collaboration with community partners, conducts the bi-annual One Day Homeless Count and Survey (count). The purpose of the count is to gather and analyze information to help the community understand homelessness in the County. This is one data set, among others, which provides information for effective planning of services to assist people experiencing homelessness and people at risk of homelessness. HSA's Center on Homelessness and the San Mateo County Continuum of Care (CoC) Steering Committee are responsible for overseeing this data collection effort, with assistance from a broad group of community partners, including non-profit social service providers, city and town governments, and people who have former or current homelessness experiences.

The One Day Homeless Count and Survey (count) was designed to meet two related sets of data needs. The first is the requirement of the United States Department of Housing and Urban Development (HUD) that communities applying for McKinney-Vento Homelessness Assistance funds (i.e., Continuum of Care funds) must conduct a point-in-time count of homeless people a minimum of every two years. These counts are required to take place in the last ten days of January. The count was last conducted in January 2019 to meet this HUD requirement. The previous HUD-mandated count was conducted in January 2017. The second set of data needs is for local homeless system planning, as the count provides information about people experiencing homelessness and trends over time.

The 2019 count determined that there were 1,512 people experiencing homelessness in San Mateo County on the night of January 30, 2019. This comprised of the following.

- **901 unsheltered** homeless people (living on streets, in cars, in recreational vehicles (RVs), in tents/encampments), and
- **611 sheltered** homeless people (in emergency shelters and transitional housing programs).

This finding of 1,512 people was higher than the 2017 and 2015 counts, but lower than the 2011 and 2013 counts. The number of people living in shelters in 2019 remained similar to the number counted in 2017. The overall increase in homelessness from 2017 to 2019 was driven primarily by a significant increase in the number of people living in RVs (127% increase). There was also an increase in the number of people sleeping on the street (24% increase). However, compared to 2017, the 2019 count found a decrease in people estimated to be sleeping in cars (7% decrease) and in tents/encampments (31% decrease).

While no unsheltered families were directly observed during the 2019 count, the number of families with children experiencing unsheltered homelessness was estimated to have been 16 (in cars, tents/ encampments, and/or RVs). This number represents a 16% decrease in families from the 19 families estimated to be unsheltered in the 2017 count.

The count found seven unsheltered individuals in the City of Belmont. This was an increase from 2017, when one homeless individual was located, but lower than in 2013, when 43 people were counted. Although demographic data are not available for each individual jurisdiction, several key findings were made.

The 2019 One Day Homeless Count and Survey counted 1,018 households comprised of 1,110 single adults and 119 family households comprised of 401 adults and children.

A person in an adult only household was most likely to be unsheltered (75.5%), over 25 years old (95.1%), male (75.6%), non-Hispanic (64.9%), Caucasian (70.5%), and not experiencing chronic homelessness (71.4%). Family households were most likely to be in transitional housing (67.6%), have more children than adults (59.1% vs. 40.9% respectively), and be headed by a female (57.1%). People heading family households were also predominantly non-Hispanic (53.6%) and Caucasian (55.9%); however, race and ethnicity showed more variation in family households than adult only households.

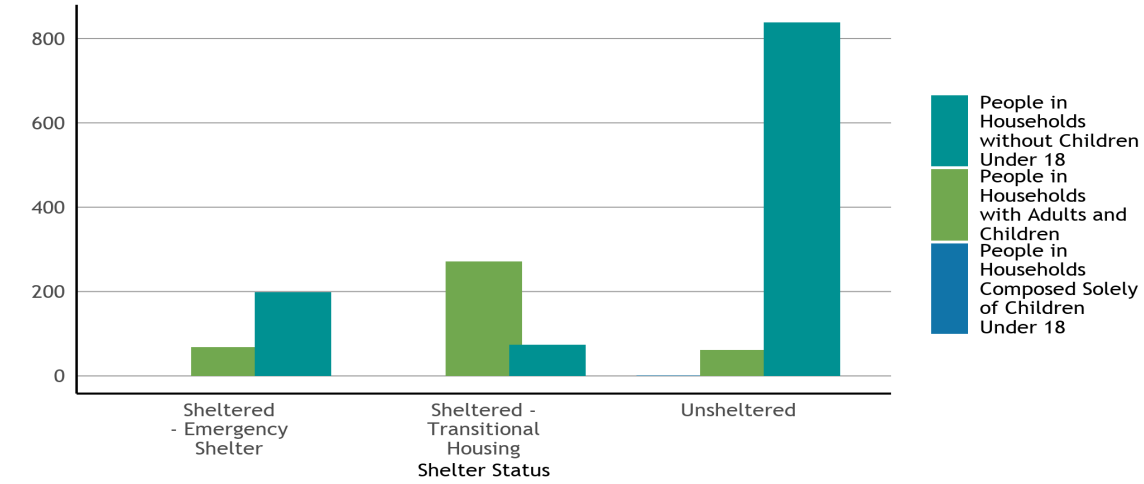
Furthermore, the percentage of people experiencing chronic homelessness over time increased from 19% in 2017 to 21% in 2019, but this figure was substantially lower than in 2013, when 45% were chronically homeless. In 2019, veterans represented 5% of adults, a reduction from 11% in 2017. Severe mental illness, alcohol and/or drug use, and history of domestic violence were some of the self-reported conditions of those who were counted. For more information, see https://hsa.smcgov.org/2019-one-day-homeless-count.

In San Mateo County, the most common type of household experiencing homelessness is those without children in their care. Among households experiencing homelessness that do not have children, 75.5% are unsheltered. Of homeless households with children, most are sheltered in transitional housing (see Figure 43).

People of color are more likely to experience poverty and financial instability because of federal and local housing policies that have historically excluded them from the same opportunities extended to White residents. Consequently, people of color are often disproportionately impacted by homelessness, particularly Black residents of the Bay Area.

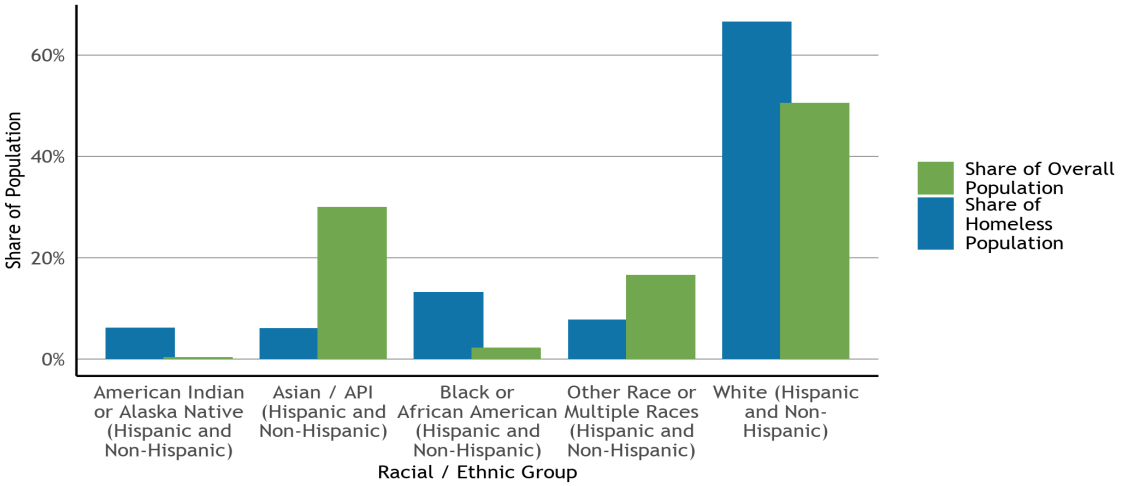
In San Mateo County, White (Hispanic and Non-Hispanic) residents represent the largest proportion of residents experiencing homelessness and account for 66.6% of the homeless population, while making up 50.6% of the overall population (see Figure 44).

Figure 43: Homelessness by Household Type and Shelter Status, San Mateo County



Universe: Population experiencing homelessness.
Notes: This data is based on Point-in-Time (PIT) information provided to HUD by CoCs in the application for CoC Homeless Assistance Programs. The PIT Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January. Each Bay Area county is its own CoC, and so the data for this table is provided at the county-level. Per HCD's requirements, jurisdictions will need to supplement this county-level data with local estimates of people experiencing homelessness.
Source: U.S. Department of Housing and Urban Development (HUD), Continuum of Care (CoC) Homeless Populations and Subpopulations Reports (2019).
For the data table behind this figure, please refer to the Data Packet Workbook, Table HOMELS-01.

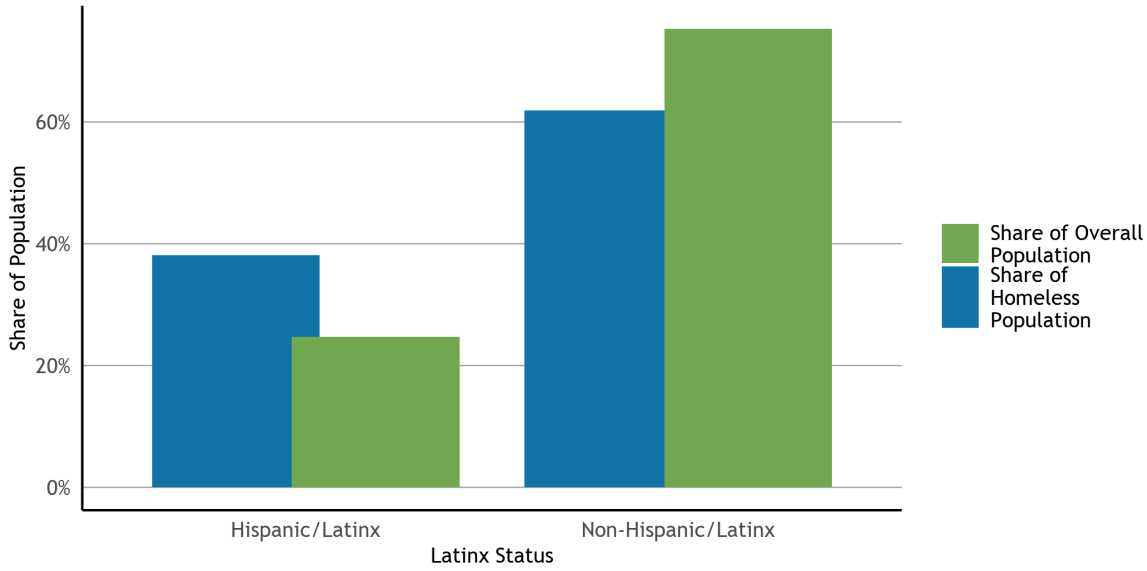
Figure 44: Racial Group Share of General and Homeless Populations, San Mateo County



Universe: Population experiencing homelessness.
Notes: This data is based on Point-in-Time (PIT) information provided to HUD by CoCs in the application for CoC Homeless Assistance Programs. The PIT Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January. Each Bay Area county is its own CoC, and so the data for this table is provided at the county-level. Per HCD's requirements, jurisdictions will need to supplement this county-level data with local estimates of people experiencing homelessness. HUD does not disaggregate racial demographic data by Hispanic/Latinx ethnicity for people experiencing homelessness. Instead, HUD reports data on Hispanic/Latinx ethnicity for people experiencing homelessness in a separate table. Accordingly, the racial group data listed here includes both Hispanic/Latinx and non-Hispanic/Latinx individuals.
Source: U.S. Department of Housing and Urban Development (HUD), Continuum of Care (CoC) Homeless Populations and Subpopulations Reports (2019); U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B01001 (A-I).
For the data table behind this figure, please refer to the Data Packet Workbook, Table HOMELS-02.

In San Mateo County, Latinx residents represent 38.1% of the population experiencing homelessness, while Latinx residents comprise 24.7% of the general population (see Figure 45).

Figure 45: Latinx Share of General and Homeless Populations, San Mateo County

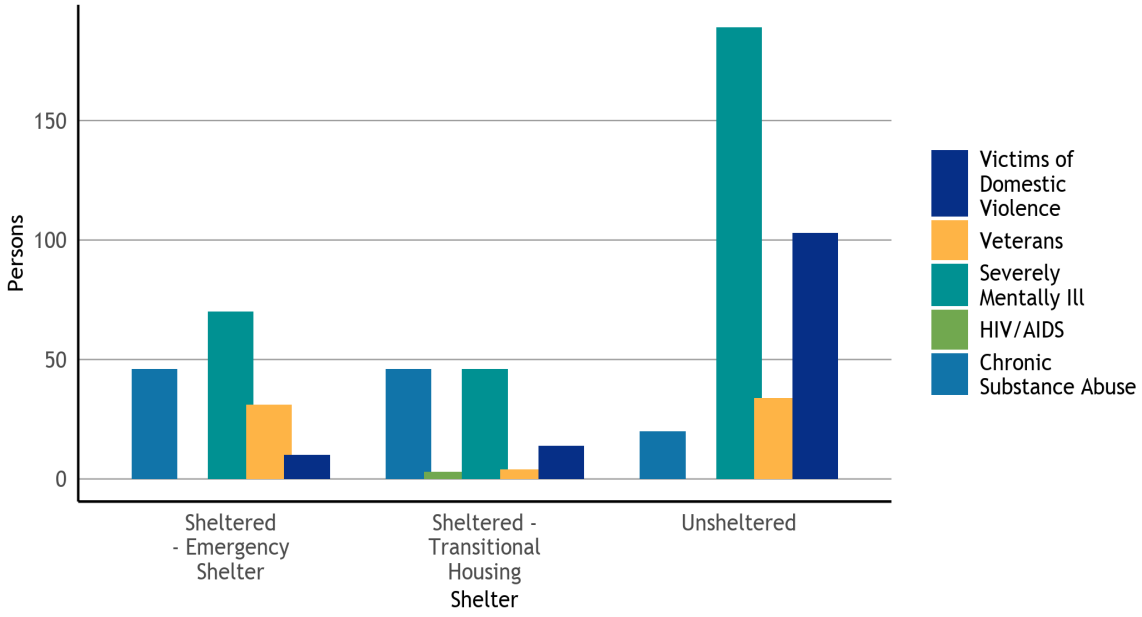


Universe: Population experiencing homelessness.
Notes: This data is based on Point-in-Time (PIT) information provided to HUD by CoCs in the application for CoC Homeless Assistance Programs. The PIT Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January. Each Bay Area county is its own CoC, and so the data for this table is provided at the county-level. Per HCD's requirements, jurisdictions will need to supplement this county-level data with local estimates of people experiencing homelessness. The data from HUD on Hispanic/Latinx ethnicity for individuals experiencing homelessness does not specify racial group identity. Accordingly, individuals in either ethnic group identity category (Hispanic/Latinx or non-Hispanic/Latinx) could be of any racial background.
Source: U.S. Department of Housing and Urban Development (HUD), Continuum of Care (CoC) Homeless Populations and Subpopulations Reports (2019); U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B01001(A-I).
For the data table behind this figure, please refer to the Data Packet Workbook, Table HOMELS-03.

Many of those experiencing homelessness are dealing with severe issues–including mental illness, substance abuse, and domestic violence–that are potentially life-threatening and require additional assistance. In San Mateo County, homeless individuals are commonly challenged by severe mental illness, with 305 reporting this condition (see Figure 46). Of those, some 62% are unsheltered, further adding to the challenge of handling the issue.

In Belmont, the student population experiencing homelessness totaled 17 during the 2019-20 school year and none in the 2016-17 school year. By comparison, San Mateo County has seen a 37.5% decrease in the population of students experiencing homelessness since the 2016-17 school year, and the Bay Area population of students experiencing homelessness decreased by 8.5% during the same period. During the 2019-20 school year, there were still approximately 13,718 students experiencing homelessness in the region, adding undue burdens on learning and thriving, with the potential for longer-term negative effects. The number of students in Belmont experiencing homelessness in 2019 represented 1.4% of the San Mateo County total and 0.1% of the Bay Area total.

Figure 46: Characteristics for the Population Experiencing Homelessness, San Mateo County



Universe: Population experiencing homelessness.
Notes: This data is based on Point-in-Time (PIT) information provided to HUD by CoCs in the application for CoC Homeless Assistance Programs. The PIT Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January. Each Bay Area county is its own CoC, and so the data for this table is provided at the county-level. Per HCD's requirements, jurisdictions will need to supplement this county-level data with local estimates of people experiencing homelessness. These challenges/characteristics are counted separately and are not mutually exclusive, as an individual may report more than one challenge/characteristic. These counts should not be summed.
Source: U.S. Department of Housing and Urban Development (HUD), Continuum of Care (CoC) Homeless Populations and Subpopulations Reports (2019).
For the data table behind this figure, please refer to the Data Packet Workbook, Table HOMELS-04.

TABLE 16: STUDENTS IN LOCAL PUBLIC SCHOOLS EXPERIENCING HOMELESSNESS

Academic Year	Belmont	San Mateo County	Bay Area
2016-17	0	1,910	14,990
2017-18	15	1,337	15,142
2018-19	23	1,934	15,427
2019-20	17	1,194	13,718

Universe: Total number of unduplicated primary and short-term enrollments within the academic year (July 1 to June 30), public schools.
Notes: The California Department of Education considers students to be homeless if they are unsheltered, living in temporary shelters for people experiencing homelessness, living in hotels/motels, or temporarily doubled up and sharing the housing of other persons due to the loss of housing or economic hardship. The data used for this table was obtained at the school site level, matched to a file containing school locations, geocoded and assigned to jurisdiction, and finally summarized by geography.
Source: California Department of Education, California Longitudinal Pupil Achievement Data System (CALPADS), Cumulative Enrollment Data (Academic Years 2016-2017, 2017-2018, 2018-2019, 2019-2020).
This table is included in the Data Packet Workbook as Table HOMELS-05.

RESOURCES FOR PERSONS EXPERIENCING HOMELESSNESS

The County of San Mateo is the primary coordinator of services for people experiencing homelessness in the County. The City of Belmont will continue to provide support for strategic initiatives to help address the challenges faced by people experiencing homelessness in the City, as well as to support the implementation of the County's 2022-2025 Continuum of Care (COC) Strategic Plan on Homelessness.

The City continues to support the work of non-profit organizations providing housing services, including homeless prevention, supportive and emergency housing, and other services identified as priority needs through the community engagement process. The COC guides the implementation of the County's housing and service system to meet the needs of homeless individuals and families. The City of Belmont participates in COC meetings and monitors decision-making to better understand the latest trends in homeless outreach. The COC coordinates the following activities.

- System planning (identifying gaps, developing strategies to fill gaps, responding to emerging best practices, etc.).
- Setting funding priorities for Emergency Solutions Grant and COC funds.
- Assessing system performance and making system redesigns as needed.
- Coordinating with other planning entities such as the Community Action Agency.
- Undertakes a wide range of efforts to meet the needs of homeless individuals and families.

CHRONICALLY HOMELESS

COC has created a multi-disciplinary, bilingual, Homeless Outreach Team (HOT) to conduct intensive outreach and engagement with unsheltered and chronically homeless individuals and families located throughout the County, with specialized HOT teams in the Cities of Belmont, Redwood City, South San Francisco, Half Moon Bay, Pacifica, and East Palo Alto.

FAMILIES WITH CHILDREN

To reduce the number of unsheltered families, the COC has developed a rapid re- housing program. The San Mateo County Human Services Agency has provided funding for a motel voucher program to assist families with children who are waiting to access shelter.

VETERANS

Needs include housing and assistance for the homeless, employment and education services, and improved and increased liaisons with the Veterans Benefits Administration.

YOUTH

Currently, HUD COC funds are provided to the San Mateo County Mental Health Association to operate its Support and Advocacy for Young Adults in Transition Program, which provides case management and housing search/stabilization services to homeless youth. The San Mateo County Housing Authority administers the Family Unification Program vouchers.

6.6 FARMWORKERS

Farmworkers are traditionally defined as persons whose primary incomes are earned through seasonal or permanent agricultural work. Farmworkers have special housing needs because they earn lower incomes than many other workers. In many parts of Northern California, agriculture production is an important contribution to local economies, especially in Napa and Sonoma Counties.

In Belmont, there are no known farmworkers, and it does not have any farm housing or land remaining in agricultural use. Furthermore, no land within Belmont is designated for agricultural use. According to American Community Survey's 2019 five-year data, there could be an estimated 30 farmworkers in Belmont; however, the margin of error for this figure is +/- 42, indicating this information is unreliable. Even at 30 farmworkers, this represents only 0.1% of the total population in the City. Maps from the State of California Department of Conservation Farmland Mapping and Monitoring Program show no farmland in Belmont. Due to the low number of potential agricultural workers in the City, the housing needs of migrant and/or farmworker housing need can be met through general affordable housing programs.

As there are no known farmworkers in Belmont, there were no reported students of migrant workers in the 2019-20 school year. The trend for the region for the past few years has been a decline of 2.4% in the number of migrant worker students since the 2016-17 school year. The change at the county level is a 57.1% decrease in the number of migrant worker students since the 2016-17 school year.

TABLE 17: MIGRANT WORKER STUDENT POPULATION

Academic Year	Belmont	San Mateo County	Bay Area
2016-17	0	657	4,630
2017-18	0	418	4,607
2018-19	0	307	4,075
2019-20	0	282	3,976

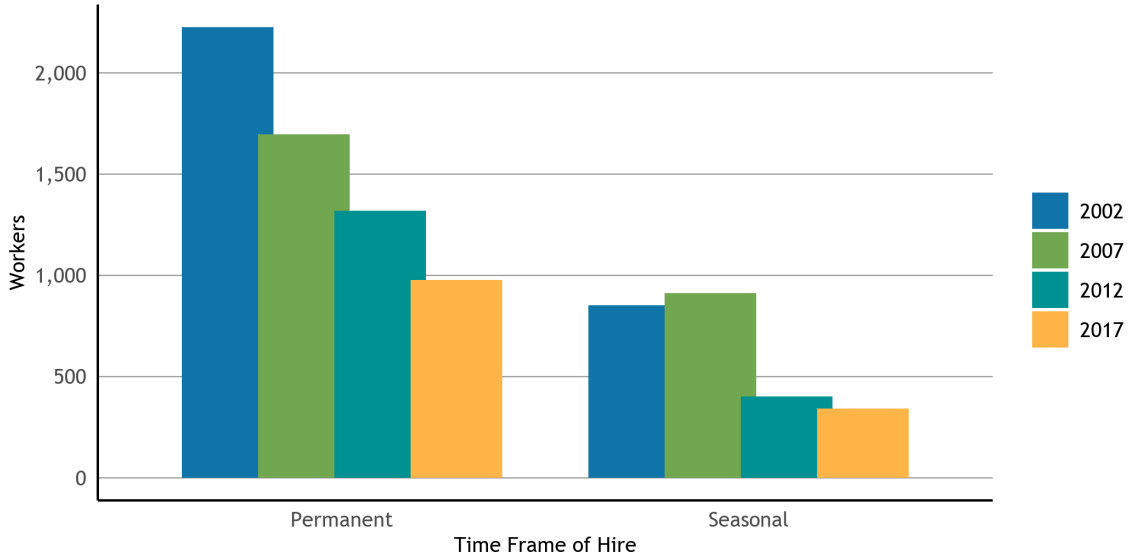
Universe: Total number of unduplicated primary and short-term enrollments within the academic year (July 1 to June 30), public schools.
Notes: The data used for this table was obtained at the school site level, matched to a file containing school locations, geocoded and assigned to jurisdiction, and finally summarized by geography.
Source: California Department of Education, California Longitudinal Pupil Achievement Data System (CALPADS), Cumulative Enrollment Data (Academic Years 2016-2017, 2017-2018, 2018-2019, 2019-2020). See Table FARM-01.

According to the U.S. Department of Agriculture Census of Farmworkers, the number of permanent farm workers in San Mateo County has decreased since 2002, totaling 978 in 2017, while the number of seasonal farm workers has also decreased, totaling 343 in 2017 (see Figure 47).

RESOURCES FOR MIGRANT AND/OR FARM WORKERS

As mentioned above, there are no known persons employed in the farming, fishing, and forestry occupations. As such, no special programs target this population in Belmont, but they can be generally assisted with Housing Choice Vouchers or other affordable housing resources.

Figure 47: Farm Operations and Farm Labor by County, San Mateo County



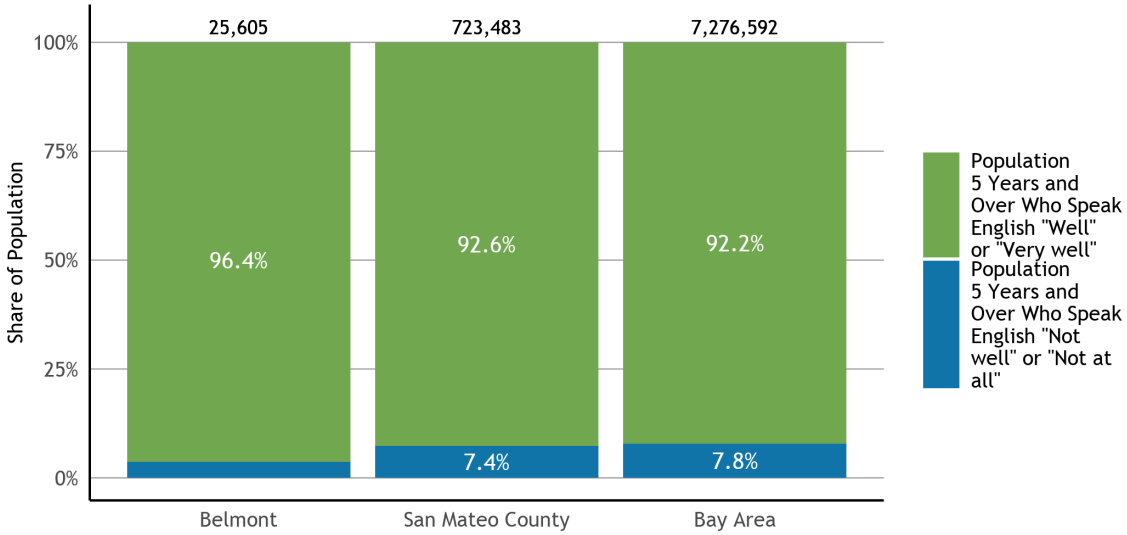
Universe: Hired farm workers (including direct hires and agricultural service workers who are often hired through labor contractors).
Notes: Farm workers are considered seasonal if they work on a farm less than 150 days in a year, while farm workers who work on a farm more than 150 days are considered to be permanent workers for that farm.
Source: U.S. Department of Agriculture, Census of Farmworkers (2002, 2007, 2012, 2017), Table 7: Hired Farm Labor.
For the data table behind this figure, please refer to the Data Packet Workbook, Table FARM-02.

6.7 NON-ENGLISH SPEAKERS

California has long been an immigration gateway to the U.S., which means many languages are spoken throughout the Bay Area. Since learning a new language is universally challenging, it is common for residents who have immigrated to the U.S. to have limited English proficiency. This limit can lead to additional disparities if there is a disruption in housing, such as an eviction, because residents might not be aware of their rights, or they might be wary to engage due to immigration status concerns.

In Belmont, 3.6% of residents five years and older identify as speaking English "not well" or "not at all," which is below the percentage in San Mateo County. Throughout the region, the proportion of residents five years and older with limited English proficiency is 8% (Figure 48).

Figure 48: Population with Limited English Proficiency



Universe: Population 5 years and over.
Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B16005.
For the data table behind this figure, please refer to the Data Packet Workbook, Table AFFH-03.

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Table A: Housing Element Sites Inventory, Table Starts in Cell A2

For San Mateo County jurisdictions, please format the APNs as follows: 999-999-999

Jurisdiction Name	Site Address/Intersection	5 Digit ZIP Code	Assessor Parcel Number	Consolidated Sites	General Plan Designation (Current)	Zoning Designation (Current)	Minimum Density Allowed (units/acre)	Maximum Density Allowed (units/acre)	Parcel Size (Acres)	Existing Use/Vacancy	Infrastructure	Publicly-Owned	Site Status	Identified in Last/Last Two Planning Cycle(s)	Lower Income Capacity	Moderate Income Capacity	Above Moderate Income Capacity	Total Capacity	Optional Information1	Optional Information2	Optional Information3
BELMONT	210 EL CAMINO REAL	94002	044-152-100	A	Corridor Mixed Use	CMU	0	45	0.50	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	16	6	15	37			
BELMONT	230 EL CAMINO REAL	94002	044-152-110	A	Corridor Mixed Use	CMU	0	45	0.09	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	3	1	3	7			
BELMONT	240 EL CAMINO REAL	94002	044-152-120	A	Corridor Mixed Use	CMU	0	45	0.10	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	3	1	4	8			
BELMONT	832 BELMONT AVENUE	94002	044-173-120	B	Corridor Mixed Use	CMU	0	45	0.15	Vacant	YES - Potential	NO - Privately-Owne	Available	Used in Two Consecutive Prior Housing Elements - Vacant	2	1	2	5			
BELMONT	832 BELMONT AVENUE	94002	044-173-190	B	Corridor Mixed Use	CMU	0	45	0.18	Vacant	YES - Potential	NO - Privately-Owne	Available	Used in Two Consecutive Prior Housing Elements - Vacant	3	1	2	6			
BELMONT	832 BELMONT AVENUE	94002	044-173-210	B	Corridor Mixed Use	CMU	0	45	0.09	Vacant	YES - Potential	NO - Privately-Owne	Available	Used in Two Consecutive Prior Housing Elements - Vacant	1	1	1	3			
BELMONT	832 BELMONT AVENUE	94002	044-173-220	B	Corridor Mixed Use	CMU	0	45	0.10	Vacant	YES - Potential	NO - Privately-Owne	Available	Used in Two Consecutive Prior Housing Elements - Vacant	2	0	2	4			
BELMONT	ANITA AVENUE	94002	044-173-010	B	Corridor Mixed Use	CMU	0	45	0.21	Vacant	YES - Potential	NO - Privately-Owne	Available	Not Used in Prior Housing Element	3	1	3	7			
BELMONT	510 EL CAMINO REAL	94002	044-201-180		Corridor Mixed Use	CMU	0	45	0.81	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	26	10	25	61			
BELMONT	516 EL CAMINO REAL	94002	044-201-040		Corridor Mixed Use	CMU	0	45	0.85	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	27	10	26	63			
BELMONT	530 EL CAMINO REAL	94002	044-201-080	E	Corridor Mixed Use	CMU	0	45	0.87	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	28	10	27	65			
BELMONT	530 EL CAMINO REAL	94002	044-201-070	E	Corridor Mixed Use	CMU	0	45	0.41	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	13	5	13	31			
BELMONT	500 EL CAMINO REAL	94002	044-201-280	F	Corridor Mixed Use	CMU	0	45	0.45	Hotel/motel	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	15	5	14	34			
BELMONT	564 EL CAMINO REAL	94002	044-201-270	F	Corridor Mixed Use	CMU	0	45	0.31	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	10	4	9	23			
BELMONT	690 EL CAMINO REAL	94002	044-222-210		Corridor Mixed Use	CMU	0	45	0.44	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	6	2	5	13			
BELMONT	780 EL CAMINO REAL	94002	044-222-180		Corridor Mixed Use	CMU	0	45	0.12	Vacant	YES - Potential	YES - City-Owned	Available	Used in Two Consecutive Prior Housing Elements - Vacant	0	3	0	3			
BELMONT	640 MASONIC WAY	94002	040-312-180		Village Station Core	VSC	0	0	0.97	Public facilities	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	31	12	30	73			
BELMONT	MASONIC WAY	94002	040-313-310	J	Village Station Core	VSC	0	0	0.33	Parking	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	11	4	10	25			
BELMONT	600 RALSTON AVENUE	94002	040-313-270	J	Village Core Mixed Use	VCMU	0	0	0.24	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	8	3	7	18			
BELMONT	698 RALSTON AVENUE	94002	040-313-140	K	Village Core Mixed Use	VCMU	0	0	0.39	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	13	5	12	30			
BELMONT	951 OLD COUNTY ROAD	94002	040-313-430	K	Village Core Mixed Use	VCMU	0	0	0.34	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	11	4	10	25			
BELMONT	575 RALSTON AVENUE	94002	040-334-300		Village Core Mixed Use	VCMU	0	0	0.36	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	5	2	4	11			
BELMONT	601 RALSTON AVENUE	94002	040-332-220		Village Core Mixed Use	VCMU	0	0	0.35	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	4	2	4	10			
BELMONT	1075 OLD COUNTY ROAD	94002	040-332-270		Village Core Mixed Use	VCMU	0	0	0.96	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	31	11	30	72			
BELMONT	1141 OLD COUNTY ROAD	94002	040-332-260	O	Village Core Mixed Use	VCMU	0	0	0.54	Industrial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	17	6	17	40			
BELMONT	1161 OLD COUNTY ROAD	94002	040-332-110	O	Village Core Mixed Use	VCMU	0	0	0.28	Industrial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	9	3	9	21			
BELMONT	1000 EL CAMINO REAL	94002	045-182-250	P	Village Core	VC	0	0	0.94	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	30	11	29	70			
BELMONT	RALSTON AVENUE AT EL CAMINO	94002	045-182-260	P	Village Core	VC	0	0	0.07	Public facilities	YES - Current	YES - City-Owned	Available	Used in Prior Housing Element - Non-Vacant	3	1	2	6			
BELMONT	883 RALSTON AVENUE	94002	045-182-270		Village Core	VC	0	0	0.61	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	20	7	19	46			
BELMONT	915 RALSTON AVENUE	94002	045-182-040	R	Village Core	VC	0	0	0.13	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	4	2	4	10			
BELMONT	925 RALSTON AVENUE	94002	045-182-030	R	Village Core	VC	0	0	0.13	Parking	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	4	2	4	10			
BELMONT	940 EMMETT STREET	94002	045-182-200	R	Village Core	VC	0	0	0.17	Parking	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	5	2	5	12			
BELMONT	940 EMMETT STREET	94002	045-182-210	R	Village Core	VC	0	0	0.31	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	10	3	10	23			
BELMONT	945 RALSTON AVENUE	94002	045-182-020	R	Village Core	VC	0	0	0.15	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	5	2	5	12			
BELMONT	1085 SIXTH AVENUE	94002	045-182-220	S	Village Core	VC	0	0	0.17	Parking	YES - Current	YES - City-Owned	Available	Used in Prior Housing Element - Non-Vacant	6	2	5	13			
BELMONT	995 RALSTON AVENUE	94002	045-182-010	S	Village Core	VC	0	0	0.36	Commercial	YES - Current	NO - Privately-Owne	Available	Used in Prior Housing Element - Non-Vacant	12	4	11	27			
BELMONT	1520 EL CAMINO REAL	94002	045-253-300	T	Village Core Mixed Use	VCMU	0	0	0.20	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	7	2	6	15			
BELMONT	1538 EL CAMINO REAL	94002	045-253-290	T	Corridor Mixed Use	CMU	0	45	0.47	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	15	6	14	35			
BELMONT	1501 EL CAMINO REAL	94002	045-252-080		Corridor Mixed Use	CMU	0	45	1.02	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	33	12	31	76			
BELMONT	1601 EL CAMINO REAL	94002	045-252-100		Corridor Mixed Use	CMU	0	45	1.68	Commercial	YES - Current	NO - Privately-Owne	Available	Not Used in Prior Housing Element	54	20	52	126			
BELMONT	1477 EL CAMINO REAL	94002	045-247-030		Corridor Mixed Use	CMU	0	45	0.15	Vacant	YES - Current	NO - Privately-Owne	Pending Project	Not Used in Prior Housing Element	0	0	5	5			
BELMONT	580 MASONIC WAY	94002	040-315-010		Village Station Core	VSC	0	0	1.24	Commercial	YES - Current	NO - Privately-Owne	Pending Project	Used in Prior Housing Element - Non-Vacant	11	11	117	139			
BELMONT	678 RALSTON	94002	040-313-280		Village Core Mixed Use	VCMU	0	0	0.36	Commercial	YES - Current	NO - Privately-Owne	Pending Project	Used in Prior Housing Element - Non-Vacant	64	0	1	65			
BELMONT																		0

Table C: Land Use, Table Starts in A2

Zoning Designation From Table A, Column G and Table B, Columns L and N (e.g., "R-1")	General Land Uses Allowed (e.g., "Low-density residential")
CMU	High-density mixed-use
VCMU	High-density residential and mixed-use
VC	High-intensity mixed-use
VSC	High-density residential and low mixed-use

APPENDIX C: AFFH

AFFH Attachment C.1.
City of Belmont Fair Housing Assessment

What is AFFH?

The State of California's 2018 Assembly Bill (AB 686) requires that all public agencies in the state affirmatively further fair housing (AFFH) beginning January 1, 2019. Public agencies receiving funding from the U.S. Department of Housing and Urban Development (HUD) are also required to demonstrate their commitment to AFFH. The federal obligation stems from the fair housing component of the federal Civil Rights Act mandating federal fund recipients to take "meaningful actions" to address segregation and related barriers to fair housing choice.

AB 686 requires all public agencies to "administer programs and activities relating to housing and community development in a manner that affirmatively furthers fair housing and take no action inconsistent with this obligation."[1]

AB 686 also makes changes to Housing Element Law to incorporate requirements to AFFH as part of the housing element and general plan to include an analysis of fair housing outreach and capacity, integration and segregation, access to opportunity, disparate housing needs, and current fair housing practices.

Affirmatively Furthering Fair Housing

"Affirmatively furthering fair housing" means taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Taken together, these actions should address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws. The duty to affirmatively further fair housing extends to all of a public agency's activities and programs relating to housing and community development. (Gov Code, § 8899.50, subd. (a)(1).)"

Source: California Department of Housing and Community Development Guidance, 2021, page 14.

[1] California Department of Housing and Community Development Guidance, 2021, page 9.

History of segregation in the region. The United States' oldest cities have a history of mandating segregated living patterns—and Northern California cities are no exception. ABAG, in its recent Fair Housing Equity Assessment, attributes segregation in the Bay Area to historically discriminatory practices—highlighting redlining and discriminatory mortgage approvals—as well as "structural inequities" in society, and "self-segregation" (i.e., preferences to live near similar people).

Researcher Richard Rothstein's 2017 book *The Color of Law: A Forgotten History of How Our Government Segregated America* chronicles how the public sector contributed to the segregation that exists today. Rothstein highlights several significant developments in the Bay Area region that played a large role in where the region's non-White residents settled.

This history of segregation in the region is important not only to understand how residential settlement patterns came about—but, more importantly, to explain differences in housing opportunity among residents today. In sum, not all residents had the ability to build housing wealth or achieve economic opportunity. This historically unequal playing field in part determines why residents have different housing needs today.

Pre-civil rights San Mateo County faced resistance to racial integration, yet it was reportedly less direct than in some Northern California communities, taking the form of "blockbusting" and "steering" or intervention by public officials. These local discriminatory practices were exacerbated by actions of the Federal Housing Administration which excluded low-income neighborhoods, where the majority of people of color lived, from its mortgage loan program.

According to the San Mateo County Historical Association. San Mateo County's early African Americans worked in a variety of industries, from logging, to agriculture, to restaurants and entertainment. Expansion of jobs, particularly related to shipbuilding during and after World War II attracted many new residents into the Peninsula, including the first sizable migration of African Americans. Enforcement of racial covenants after the war forced the migration of the county's African Americans into neighborhoods where they were allowed to occupy housing—housing segregated into less desirable areas, next to highways, and concentrated in public housing and urban renewal developments.

The segregating effect of blockbusting activities is well-documented in East Palo Alto. In 1954, after a White family in East Palo Alto sold their home to an African American family, the then-president of the California Real Estate Association set up an office in East Palo Alto to scare White families into selling their homes ("for fear of declining property values") to agents and speculators. These agents then sold these homes at over-inflated prices to African American buyers, some of whom had trouble making their payments. Within six years, East Palo Alto—initially established with "whites only" neighborhoods—became 82% African American. The FHA prevented re-integration by refusing to insure mortgages held by White buyers residing in East Palo Alto.

Throughout the county, neighborhood associations and city leaders attempted to thwart the integration of communities. Although some neighborhood residents supported integration, most did not, and it was not unusual for neighborhood associations to require the acceptance of all new buyers. Builders with intentions to develop for all types of buyers (regardless of race) found that their development sites were rezoned by planning councils, required very large minimum lot sizes, and\or were denied public infrastructure to support their developments or charged prohibitively high amounts for infrastructure.

In addition to historical discriminatory practices that embedded segregation into living patterns throughout the Bay Area, it's also necessary to recognize the historical impacts of colonization and genocide on Indigenous populations and how the effects of those atrocities are still being felt today. The original inhabitants of present-day San Mateo County are the Ramaytush Ohlone, who have "…lived on the San Francisco Peninsula for thousands of years and continue to live here as respectful stewards of the land."[2] However, "due to the devastating policies and practices of a succession of explorers, missionaries, settlers, and various levels of government over the centuries since European expansion, the Ramaytush Ohlone lost the vast majority of their population as well as their land."[3] The lasting influence of these policies and practices has contributed directly to the disparate housing and economic outcomes collectively experienced by Native populations today.[4]

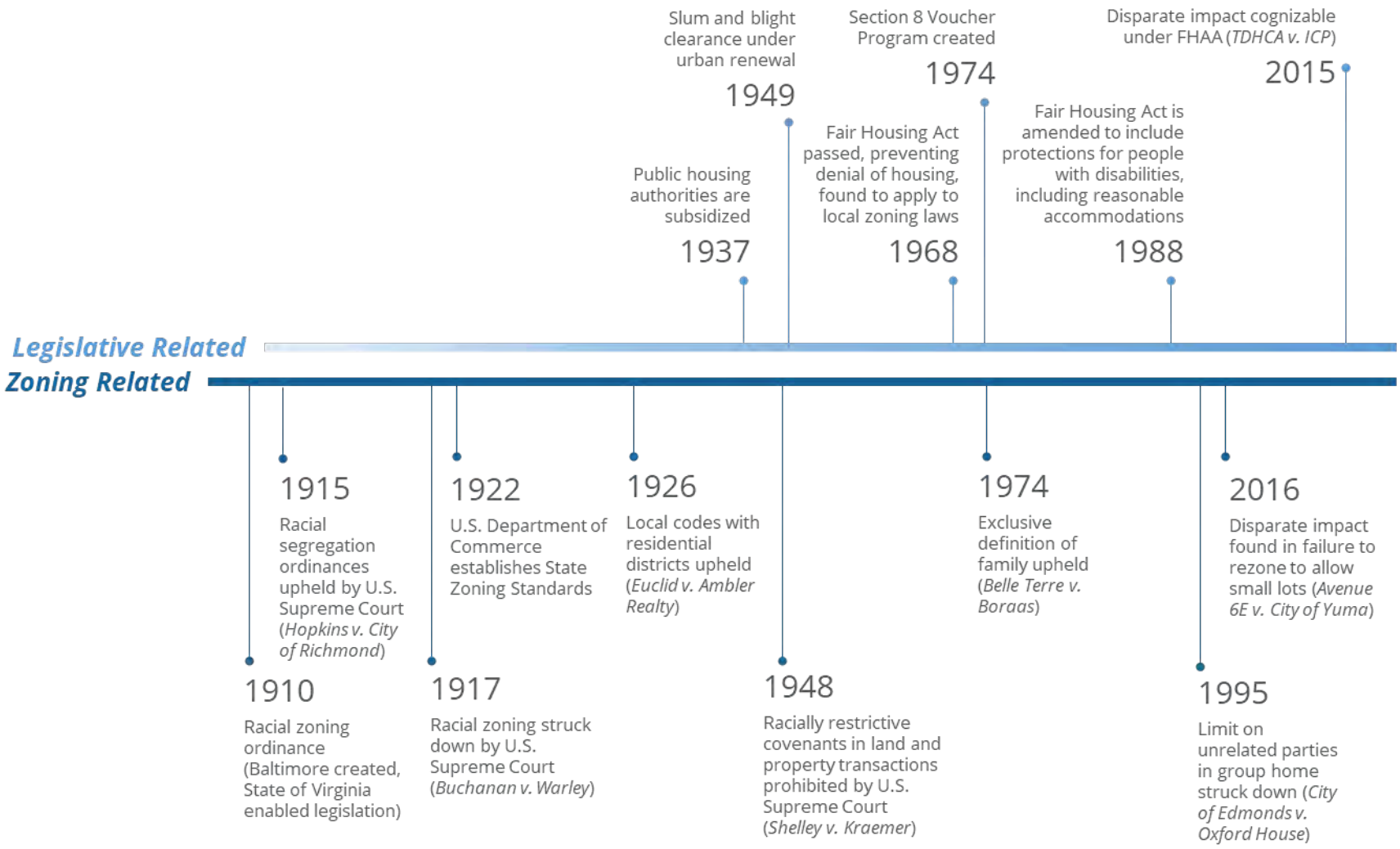
The timeline of major federal Acts and court decisions related to fair housing choice and zoning and land use appears on the following page.

As shown in the timeline, exclusive zoning practices were common in the early 1900s. Courts struck down only the most discriminatory and allowed those that would be considered today to have a "disparate impact" on classes protected by the Fair Housing Act. For example, the 1926 case *Village of Euclid versus Amber Realty Co. (272 U.S. 365)* supported the segregation of residential, business, and industrial uses, justifying separation by characterizing apartment buildings as "mere parasite(s)" with the potential to "utterly destroy" the character and desirability of neighborhoods. At that time, multi-family apartments were the only housing options for people of color, including immigrants.

The Federal Fair Housing Act was not enacted until nearly 60 years after the first racial zoning ordinances appeared in U.S. cities. This coincided with a shift away from federal control over low-income housing toward locally-tailored approaches (block grants) and market-oriented choice (Section 8 subsidies)—the latter of which is only effective when adequate affordable rental units are available.

[2] https://www.smcoe.org/for-communities/indigenous-people-of-san-mateo-county.html
[3] https://www.smcoe.org/for-communities/indigenous-people-of-san-mateo-county.html
[4] https://www.americanprogress.org/article/systemic-inequality-displacement-exclusion-segregation/

Major Public and Legal Actions that Influence Fair Access to Housing



Report Content and Organization

This Fair Housing Assessment follows the April 2021 State of California State Guidance for AFFH. The study was conducted as part of the 21 Elements process, which facilitates the completion of Housing Elements for all San Mateo County jurisdictions. The figures that are referenced throughout this section are contained in Attachment C.4 Belmont AFFH Segregation Report and Attachment C.6 Maps and Data Packet. This supplemental attachment includes data tables comparing the jurisdiction to the county and broader region, in addition to HCD maps created to support the AFFH.

Section I. Fair Housing Enforcement and Outreach Capacity reviews lawsuits/enforcement actions/complaints against the jurisdiction; compliance with state fair housing laws and regulations; and jurisdictional capacity to conduct fair housing outreach and education.

Section II. Integration and Segregation identifies areas of concentrated segregation, degrees of segregation, and the groups that experience the highest levels of segregation.

Section III. Access to Opportunity examines differences in access to education, transportation, economic development, and healthy environments.

Section IV. Disproportionate Housing Needs identifies which groups have disproportionate housing needs including displacement risk.

Section V. AFFH Sites Inventory Analysis. AB 686 required analysis of sites identified to meet RHNA obligations for their ability to affirmatively further fair housing.

Section VI. Contributing Factors and Fair Housing Action Plan. Goals and Actions designed to address fair housing issues and contributing factors.

AFFH Attachments:

- C.2. AFFH Community Engagement - Resident survey results—findings from a survey of Belmont residents on their experience finding and remaining in housing, with comparisons to the experience of county residents overall.
- C.3. Disparate Access to Education Opportunities—findings from a countywide analysis of access to education and educational outcomes by protected class.
- C.4. Belmont AFFH Segregation Report—Prepared by UC Merced Urban Policy Lab and ABAG/MTC Staff, describes racial and income segregation in Bay Area jurisdictions.
- C.5. State Fair Housing Laws and Regulations—a summary of key State laws and regulations related to mitigating housing discrimination and expanding housing choice.

- C.6. Belmont Maps and Data Packet—This supplemental attachment includes data tables comparing the jurisdiction to the county and broader region, in addition to HCD maps created to support the AFFH.

Primary Findings

- **Nine fair housing inquiries and two fair housing complaints were made by Belmont residents between 2017 and 2021.** A complaint filed in 2017 concerned refusal to rent based on national origin; it was settled through a conciliation agreement. A 2021 complaint based on disability for failure to provide reasonable accommodations was withdrawn by the complainant.
- Fifty-four (54%) percent of Belmont's population is non-Hispanic White; 28% is Asian; 12% is Hispanic/Latinx; and 4% is other races or mixed race. **Belmont has proportionately fewer residents of color than in the county and the Bay area overall**, although the city's Asian population is on par with the proportion in the county and Bay area. Belmont has grown more racially and ethnically diverse since 2000 and 2010, largely due to growth in Asian residents (mostly occurring between 2010 and 2020) and a slight increase in Hispanic/Latinx residents (mostly between 2000 and 2010).
- **Racial and ethnic minority populations in Belmont**—with the exception of Asians—**are more likely to be living in poverty and be housing cost burdened** compared to the non-Hispanic White population. They are also slightly **more likely to be denied a mortgage loan**. On the positive side, residents living in Belmont—regardless of race and ethnicity—**have strong access to highly resourced neighborhoods.**
- Although **Asian residents** are less likely than other residents to experience cost burden, they have **relatively high rates of overcrowding**, suggesting that some are doubling up to afford to live in Belmont.
    - One-third of non-Hispanic White households are cost burdened, with 15% severely cost burdened. Only 2.8% live in overcrowded conditions.
    - One-quarter of Asian households are cost burdened with only 9% severely burdened. Yet 7.8% live in overcrowded conditions.
    - Hispanic/Latinx households have much higher rates of cost burden—48% are burdened and 25% severely burdened—and one in ten lives in an overcrowded household.
    - **Nearly all of Belmont's households earning 30% of AMI and less are burdened**, with the vast majority severely burdened (Figure IV-10, Attachment C.6). The level of burden diminishes greatly once households earn 80% of AMI and more.
- According to TCAC's educational opportunity map, **all census tracts in Belmont have schools with the most positive educational outcomes.** Belmont offers a strong

educational environment citywide. Students with disabilities in the Belmont-Redwood Shores district do comparatively well.

- **Educational outcomes vary for some racial and ethnic groups**, and the school district could improve proficiency gaps and differences in suspension rates. Specifically,
  - 82% of students in Belmont's district meet or exceed English language arts and literacy standards; 79% exceed math standards; both are higher than the county overall. These outcomes are much lower for some students of color: 44% of Black or African American students and 64% of Hispanic students meet or exceed state English language arts standards, and 37% of Black or African American students and 52% of Hispanic students meet or exceed state math standards.
  - **Suspensions are disproportionately high for Hispanic students.** Hispanic students make up 34% of the high school district student body yet account for 66% of suspensions.
- **Belmont's largest challenge lies in housing affordability**. In two census tracts, between 40% and 60% of renter households face housing burden. Yet compared to surrounding cities, Belmont offers better rental affordability, according to the HCD Location Affordability Index (Figure IV-29, Attachment C.6). Just 18% of Belmont's owner-occupied units are priced below $1 million, compared to 44% for the county and 65% for the Bay area overall.
- **Belmont has not kept up with demand for new housing**. The number of homes in Belmont increased by .6% from 2010 to 2020, below the growth rate for San Mateo County and the region's housing stock. Between 2010 and 2020, Belmont built more single family than multifamily homes, and the city's share of housing stock comprised of single family detached homes is above that of other jurisdictions in the region. [5]
- Nine percent (9%) of Belmont's residents have a disability, which is on par with the county and the Bay area overall.
- **Belmont does not currently have a pattern of segregation or clustering based on race unlike nearby cities.** The Racial Dot Map (Figure 1, Attachment C.4) provides a visual demonstration of the spatial distribution of residents based on race in Belmont while Figure 5 (Attachment C.4) includes the surrounding area for context.
- **Geospatially, lower-income residents are distributed throughout the City, without strong patterns of clustering**. The Income Dot Map (Figure 8, Attachment C.4) shows that Belmont has a distribution of all income groups with a slight concentration of above-moderate income residents in the northwest portion of the City.

[5] Housing Needs Data Report completed by ABAG/MTC staff and Baird + Driskell Planning.

SECTION I. Fair Housing Enforcement and Outreach Capacity

This section discusses fair housing legal cases and inquiries, fair housing protections and enforcement, and outreach capacity.

Fair Housing Legal Cases and Inquiries. California fair housing law extends beyond the protections in the Federal Fair Housing Act (FHA). In addition to the FHA protected classes—race, color, ancestry/national origin, religion, disability, sex, and familial status—**California law offers protections for age, sexual orientation, gender identity or expression, genetic information, marital status, military or veteran status, and source of income** (including federal housing assistance vouchers).

The California Department of Fair Employment in Housing (DFEH) was established in 1980 and is now the **largest civil rights agency in the United States**. According to their website, the DFEH's mission is "to protect the people of California from unlawful discrimination in employment, housing and public accommodations (businesses) and from hate violence and human trafficking in accordance with the Fair Employment and Housing Act (FEHA), Unruh Civil Rights Act, Disabled Persons Act, and Ralph Civil Rights Act".[6]

DFEH receives, evaluates, and investigates fair housing complaints. DFEH plays a particularly significant role in investigating fair housing complaints against protected classes that are not included in federal legislation and therefore not investigated by HUD. DFEH's website provides detailed instructions for filing a complaint, the complaint process, appealing a decision, and other frequently asked questions.[7] Fair housing complaints can also be submitted to HUD for investigation.

Additionally, San Mateo County has a number of **local enforcement organizations** including Project Sentinel, the Legal Aid Society of San Mateo County, and Community Legal Services of East Palo Alto. These organizations receive funding from the County and participating jurisdictions to support fair housing enforcement and outreach and education in the County.

From 2017 to 2021, 57 fair housing complaints in San Mateo County were filed with the U.S. Department of Housing and Urban Development (HUD). Of these, two (3.5%) of complaints -- were in Belmont. Countywide, most complaints cited disability status as the bias (56%), followed by race (19%), and familial status (14%). In Belmont, the complaints alleged discrimination in the terms and conditions for renting and discriminatory refusal to rent.

[6] https://www.dfeh.ca.gov/aboutdfeh/
[7] https://www.dfeh.ca.gov/complaintprocess/

Countywide, no cause determination was found in 27 complaints followed by successful conciliation or settlement with 22 complaints. In Belmont, one of the complaints was withdrawn by the complainant and the other was successfully settled. Fair housing inquiries in 2020 were primarily submitted from the City of San Mateo, Redwood City, Daly City, and Menlo Park.

Fair housing complaints filed with HUD by San Mateo County residents have been on a declining trend since 2018, when 18 complaints were filed. In 2019, complaints dropped to 5, increased to 11 in 2020, and had reached 6 by mid-2021.

Nationally, the National Fair Housing Alliance (NFHA) reported a "negligible" decrease in the number of complaints filed between 2019 and 2020. The primary bases for complaints nationally were nearly identical to San Mateo County's: disability (55%) and race (17%). Familial status represented 8% of complaints nationally, whereas this basis comprised 14% of cases in the county.

NFHA identifies three significant trends in 2020 that are relevant for San Mateo County:

- First, fair lending cases referred to the Department of Justice from federal banking regulators have been declining, indicating that state and local government entities may want to play a larger role in examining fair lending barriers to homeownership.
- Second, NFHA identified a significant increase in the number of complaints of harassment—1,071 complaints in 2020 compared to 761 in 2019.

Finally, NFHA found that 73% of all fair housing complaints in 2020 were processed by private fair housing organizations, rather than state, local, and federal government agencies—reinforcing the need for local, active fair housing organizations and increased funding for such organizations.[8]Although discrimination complaints in San Mateo County have progressively declined, findings from the 21 Elements Resident Survey suggest that residents still experience housing discrimination but do not report it. For the county overall, 19% of respondents felt they were discriminated against when looking for housing—this is highest among African American residents (62%), single parent households (44%), and precariously housed residents (39%). Households with incomes above $100,000 are least likely to experience housing discrimination—for example, only 11% of households in this income group reported housing discrimination. Rates of discrimination for the county are lower than respondents living in Belmont where 21% thought they had experienced discrimination (this is elaborated upon below).

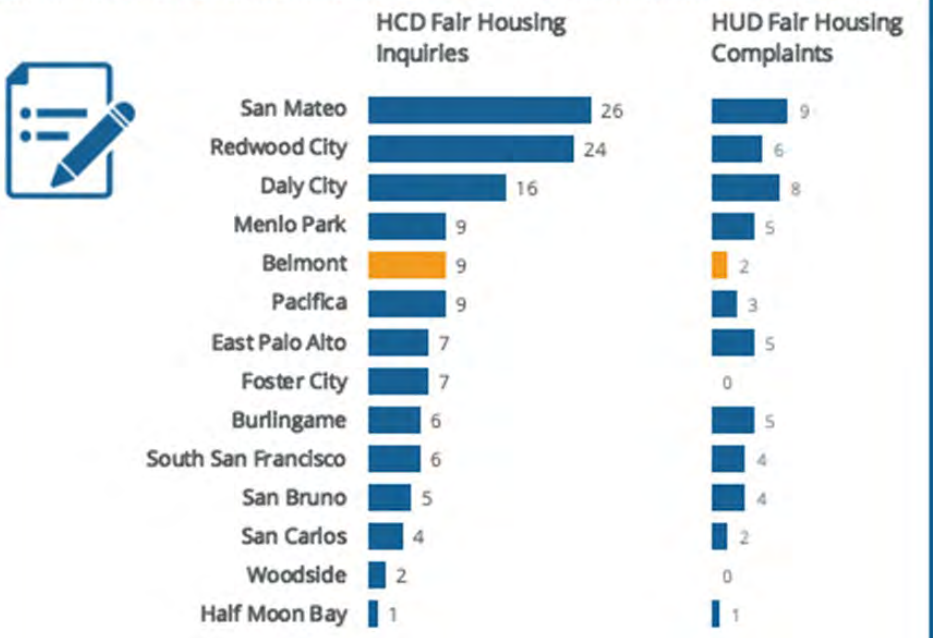
[8] https://nationalfairhousing.org/2021/07/29/annual-fair-housing-report-shows-increase-in-housing-harassment/

Fair Housing Complaints and Inquiries

HUD Fair Housing Complaints, by Basis, San Mateo County, 2017-2021

	Number	Percent
Disability	32	56%
Race	11	19%
Familial Status	8	14%
National Origin	3	5%
Religion	2	4%
Sex	1	2%
Total cases	57	100%

HCD Fair Housing Inquiries (2013- 2021) and HUD Fair Housing Complaints (2017- 2021)



Nearly half of residents in San Mateo County (45%) felt they were discriminated against in the last 2 to 5 years, 28% within the past year, 20% over 5 years ago, and 7% did not remember. Almost half (42%) did nothing about the incident because they were not sure what to do, 30% moved or found somewhere else to live, and 20% did nothing out of fear that they would be evicted or harassed. These results are similar to that reported by Belmont residents (described below).

Local Fair Housing Issues. As discussed above, some Belmont residents do feel they were discriminated against. Actions taken after the discrimination include: doing nothing for fear of harassment or eviction (50%) or did not report the event because they were unsure what to do (38%). For Belmont, it is important to take note of the large volume of respondents who did not report the incidence due to lack of information on reporting discrimination. These results suggest that there is a lack of fair housing information being

provided to city residents on housing rights and how/where to file a housing discrimination complaint.

Residents have also been denied housing while seriously looking for rentals or homes. Overall, 62% of respondents living in Belmont had seriously looked for housing to rent or buy in the past five years. Of those who had looked for housing to rent or buy, 52% were denied housing. The top reasons for denial are listed below distinguished by prospective renters and homebuyers.

For Belmont respondents looking for rental housing, top reasons for denial include:

- 33% reported that the landlord did not return their calls or emails asking about the unit;
- 27% had been told by a landlord that the unit was available but when they showed up in person the unit was no longer available; and
- 27% were denied because another renter/applicant was willing to pay more in rent.

Reasons for denial among those seeking to buy a home include:

- 35% responded "none of the above;"
- 21% had a real estate agent that told them they would need to show that they were prequalified with a bank; and
- 15% were only shown homes in neighborhoods where most people were of the same race/ethnicity.

For both renters and homebuyers, denial reasons include:

- 38% were denied housing because their income was too low; and
- 27% reported that they haven't established credit history or have no credit history.

When considering patterns of housing discrimination in the city, it is particularly important that 15% of Belmont respondents were only shown homes in neighborhoods where most people were of the same race/ethnicity. This practice is called steering—a form of housing discrimination—where housing providers influence a renter or buyer's choice of community based on protected characteristics under the Fair Housing Act and state fair housing law. Steering practices are illegal and violate both federal and state law. City officials must take note of these findings as steering presents legal challenges for the city—especially if Belmont is found to be incompliant with federal and state fair housing law. Steering practices in housing activities also hinders the city's fair housing progress and ability to provide city residents equal housing opportunity and housing choice.

Though less severe than steering practices, an additional fair housing obstacle for Belmont is local opposition to the city's plan to create more housing. This is a fair housing issue as opposition can hinder Belmont's ability to provide equal opportunity to access housing among protected classes. For the upcoming planning period (2023-2031), the city intends to surpass its RHNA allocation of 1,785 units by building 2,000 units at different affordability levels.

During the community outreach process for the Housing Element, residents in the Sterling Downs, Homeview, and El Camino neighborhoods expressed concern about the concentration of the housing development opportunity sites in their neighborhoods due to its potential impact on neighborhood character and traffic congestion. City officials specifically allocated projects in this area because of its designation as a local "Priority Development Area" with more transportation and public transit options for residents.[9] In response to these concerns, staff worked with the residents of the community on revisions to the housing development opportunity sites and ultimately received their support for the adopted January 2023 Housing Element.

Importantly, local opposition is not unique to Belmont—opposition to housing elements present complications for jurisdictions throughout San Mateo County and Contra Costa County (specifically Lafayette). Overall Belmont Residents understand and support the need for new housing, including affordable housing, but support proposing housing development in all geographical areas of the City.

Local Enforcement and Capacity. Because Belmont is a relatively small jurisdiction with limited staff and funding resources, it relies on the assistance of outside providers to assist with fair housing enforcement, including Project Sentinel. When the City receives a complaint regarding a fair housing concern, it will reach out to Project Sentinel, a regional fair housing service provider for resolution. The City also maintains information on its website directing people who believe they have been discriminated against to Project Sentinel (https://www.housing.org/).

Compliance with Federal and State Fair Housing Laws. Belmont is compliant with the federal and state fair housing laws that stimulate housing development, advance housing choice, and further fair housing goals. There is no pending litigation against the City for fair housing violations.

Federal law. Belmont is in compliance with the Fair Housing Act (FHA). The city continuously ensures fair and equal housing opportunities for protected classes. Belmont also protects characteristics not covered by the FHA including marital status and ancestry. In 2014, Belmont furthered its fair housing efforts by adopting Zoning Ordinance Section

[9] California News staff, 'New Housing Proposal Faces Backlash from East Belmont residents,' *California News*, Sep. 24, 2022, https://darik.news/california/new-housing-proposal-faces-backlash-from-east-belmont-residents-scott-scoop-news/734006.html.

27 to create simple procedures for persons with disabilities seeking equal access to housing under the Fair Housing Act.

Belmont is also compliant with the Americans with Disabilities Act (ADA). In accordance with Title II, the city designated an ADA Coordinator to oversee and coordinate city efforts to remain compliant with the ADA. The city also adopted a grievance procedure to provide prompt and equitable resolutions of non-compliance complaints.

State law. The City of Belmont is in compliance with the following state laws and has not been found of violating such laws.

- Housing Accountability Act (Gov. Code Section 65589.5), requiring the adoption of a Housing Element and requiring compliance with RHNA allocations;
- Not Net Loss Law (Gov. Code Section 65863, requiring that adequate sites be maintained to accommodate unmet RHNA allocations for all income levels;
- Limits on Growth Controls Law (Gov. Code Section 65589.5), prohibiting local agencies from denying housing development projects for very low-, low-, and moderate-income households or emergency shelters. The law provides the following exceptions:
    1) The city has a Housing Element approved by the state;
    2) The city has met or exceeded its RHNA allocation;
    3) The development would have an adverse impact on health or safety;
    4) The development is not compliant with state law; and
    5) The development is inconsistent with the jurisdiction's zoning ordinance or General Plan.
- Assembly Bill 1866, requiring cities to allow second units in all single-family residential zones and single-family dwelling units located in other residential zoning districts;
- Fair Employment and Housing Act, prohibiting discrimination in employment on the basis of numerous characteristics and discrimination in all housing activities (e.g., renting, leasing, terms and conditions) on the basis of disability status.

Housing Goals and Actions. Belmont's 2015-2023 Housing Element established goals and action items for housing development, assistance, and fair housing in the city. Many goal and action items proposed in the planning document have proven effective in addressing the unique needs of seniors, large families, disabled persons, single parents, and persons experiencing homelessness. Goals, policies, and actions are described in-depth below.

- Expand and protect housing opportunities for all economic segments and special needs groups in the community. Belmont has worked towards fulfilling this goal by:

- Using public financial resources to support the provision and production of housing for lower-income households and persons and families with special needs;
- Providing rental and homeownership assistance;
- Supporting the conservation of government subsidized and affordable housing; and
- Providing supportive services for special needs groups.

- Establish emergency shelters. Belmont created the S-2 Emergency Shelter Combining District to allow emergency shelters by right in specific zoning districts. The city completed all proposed actions for this goal in December 2015.
- Encourage housing developers to promote housing types for special needs populations. Actions the city has undertaken to achieve this are both ongoing and annual including working with special needs housing service providers to develop incentives for extremely low-income households and reaching out to supportive housing developers.
- Ensure fair and equal housing opportunity for all protected populations under the Fair Housing Act (FHA)—actions to support this goal are ongoing and include supporting fair housing services and ensuring residents are aware of their rights and responsibilities.
- Provide increased services and housing for disabled persons—Belmont completed its action items in 2014 by implementing a Reasonable Accommodation Ordinance and provided increased accessibility modifications.

Program and Service Review. The City of Belmont provides its residents various resources and programs related to affordable housing and fair housing. Programs and services currently provided by Belmont are listed below.

- Below Market Rate (BMR) Housing program—Belmont requires the construction of housing units that are affordable housing to low- and moderate-income households. Applications are considered on a "first come first serve" basis and BMR owners must occupy the home as their primary residence rather than renting the home.
- Emergency Shelter Program—the city meets with representatives from Shelter Network to determine opportunities for program support.
- Homesharing Services—Belmont partners with non-profits to facilitate homesharing to reduce housing costs, promote independence, and increase resident security. The city provides these services through the Home Investment Project for Housing (HIP), which receives annual financial assistance from the Belmont
- First-time Homeowners Workshops—in collaboration with the Housing Endowment and Regional Trust (HEART) organization, Belmont launched workshops for first-time homeowners in 2019.

- Special Needs and Extremely Low-income Housing—Belmont facilitates the creation of housing units for persons with developmental disabilities, homeless persons, and extremely low-income households. The city achieves this by providing financing for affordable housing developments that provide units for special needs populations and through leasing city-owned properties for group homes for special needs populations.
- Fair Housing Programs—the city provides annual financial support to the Peninsula Conflict-Resolution Center (PCRC) to establish city programs targeting conflict resolution, management, and resolution services for tenant-landlord disputes.
- Fair Housing Workshops—Belmont offers residents the opportunity to attend city workshops on fair housing. These workshops provide information on fair housing requirements, rights, and how fair housing supports and protects people of color, low-income families, renters, seniors, and persons with disabilities.

Belmont works with the following organizations to provide housing assistance to city residents:

- HIP Housing
- Housing Endowment and Regional Trust (HEART), providing homebuyer assistance
- San Mateo County Housing Search platform
- Renew Financial, providing residents energy efficient financing
- Shelter Network
- The Center for Independence of the Disabled (CID)
- Let's Talk Housing
- Kainos
- San Mateo County Homeless Outreach Team
- Second Unit Resources Center

Local Housing Policies. As described above, Belmont has made significant progress in implementing housing policies that promote housing production, funding for housing affordability, fair housing, and neighborhood stabilization.

For special needs populations—specifically disabled persons—the city adopted a Reasonable Accommodation Ordinance to allow for deviations from zoning regulations. The city also streamlines the processing of applications for Accessory Dwelling Units (ADUs). Additional housing tools are included below.

Housing Tools Leveraged in Belmont

Form based codes. Zoning that focuses on how a structure conforms to surrounding structures. Allows more flexibility in structure type and use.

Mixed use zoning. Zoning that allows commercial, retail, community and residential uses to occupy the same site. Can facilitate affordable housing by leveraging uses and encouraging onsite services.

Inclusionary housing. Requires that residential developments of 25 units or more provide 15% of units at affordable rents to low-income households.

In-lieu fees for inclusionary housing. Allows developers to pay a fee in-lieu of constructing affordable units required under the inclusionary housing ordinance.

Density bonuses. Allows residential development with 5 or more dwelling units providing low, very low, senior, or moderate-income housing additional density. Conforms to State Density Bonus law.

Commercial linkage fees. An impact fee for new commercial and residential developments that typically levies a per square foot fee that goes toward funding to develop or preserve affordable housing.

Results from the 2015-2023 Housing Element. Since the previous planning period, Belmont has achieved and fulfilled numerous goals and policy actions outlined in the city's 2015-2023 Housing Element. This section analyzes Belmont's progress in affordable housing development, new programs and ordinances implemented, and fair housing policies adopted. It also provides which actions included in the Housing Element were not achieved and the challenges that remain.

For the 2015-2023 cycle, Belmont surpassed its Regional Housing Needs Allocation (RHNA) obligations. This was largely due to the city's issuance of building permits. Though all affordability levels have not been met, since 2015, the city permitted 715 housing units. This is a significant achievement for the city—in eight years, Belmont had only built 31 units. Of these units, 510 are above market rate,75 are moderate, 84 are low-income units, 35 are very low-income units, and 11 were extremely low-income units. Since 2022, development projects that would add 499 units are currently in the review process or have been approved.

As proposed in the Housing Element, the city adopted an inclusionary housing ordinance in January 2017 and an inclusionary rental ordinance in 2018. Examples of projects the City

approved during the prior housing element cycle and that completed construction in 2024 include:

- 1325 Old County Road—250 unit project with 38 low-income units (largely the result of the city's recently adopted inclusionary zoning requirement);
- 815 Old Country Road—a 177 unit development with 27 low-income inclusionary housing units.

In addition, Belmont committed funding for the following 100% affordable housing projects:

- 1300 El Camino built by Mid Pen Housing (66 affordable units);
- Hill Street and El Camino across from the city's train station (37 affordable units);
- 803 Belmont Avenue (125 units).

Belmont also changed its zoning terms from dwelling units per acre to floor area ratio (FAR)—this modification has increased project densities and created more affordable units. To increase Accessory Dwelling Unit (ADU) production, the City adopted an ADU ordinance and removed its mandatory parking replacement policy. Since taking these actions, the city has added 16 new ADUs per year on average. For housing development, the City has since adopted new funding sources including housing impact fees, commercial linkage fees, and inclusionary housing in -lieu funds.

To further fair housing and address local fair housing issues, Belmont works closely with the Peninsula Conflict Resolution Center (PCRC) to improve its fair housing enforcement capacity and with Project Sentinel to promote services to city residents and publicize fair housing information at the city's permit center.

While Belmont has seen numerous improvements since the previous planning period, some action items were not delivered. The city has attributed this to limited staff capacity and a lack of staffing resources. Policies and programs not implemented since the 2015-2023 Housing Element include:

- Establish an Existing Conditions Survey for single-family properties;
- Implement a two-year pilot Residential Records Request and Inspection Program;
- Implement a legalization/amnesty program for ADUs—this was not completed despite receiving $160,000 in SB 2 Planning Grant Program funds; and
- Develop and implement a housing rehabilitation outreach program.

According to the California Department of Housing and Community Development AFFH Data Viewer (HCD data viewer), Belmont does not have any public housing buildings (Figure I-6, Attachment C.6). HCD's map of voucher holder locations shows Belmont as having three census tracts where less than 5% of units have voucher holders and two census tracts with no data (Figure I-7, Attachment C.6). This is a similar pattern in neighboring jurisdictions and in much of central San Mateo County. Voucher concentrations occur in and around Daly City, South San Francisco, and East Palo Alto.

Findings from the 21 Elements Resident Survey show 16% of survey respondents—who live in Belmont—as voucher holders. Of those who have a voucher, 64% of Belmont residents who responded to the survey indicated that it is somewhat difficult to find a landlord that accepts vouchers—this is significantly higher than those who reported that it is not difficult to find landlords who accept vouchers (14%) and those who believe it is very difficult (21%). Respondents indicated why they found it difficult to find a landlord accepting vouchers, these results are presented below.

- 64% indicated that they did not have enough time to find housing before the voucher expired;
- 45% responded that the voucher did not cover the rent for places they wanted to live;
- 36% said that landlords have policies of not renting to voucher holders;
- 27% reported not being able to find information on landlords who accept vouchers; and
- 9% reported facing other challenges in finding landlords accepting vouchers.

SECTION II. Integration and Segregation

This section discusses integration and segregation of the population by protected classes including race and ethnicity, disability status, familial status, and income status. The section concludes with an analysis of racially and ethnically concentrated areas of poverty and affluence.

Integration and Segregation

"Integration generally means a condition in which there is not a high concentration of persons of a particular race, color, religion, sex, familial status, national origin, or having a disability or a particular type of disability when compared to a broader geographic area.

Segregation generally means a condition in which there is a high concentration of persons of a particular race, color, religion, sex, familial status, national origin, or having a disability or a type of disability in a particular geographic area when compared to a broader geographic area."

Source: California Department of Housing and Community Development Guidance, 2021, page 31.

Race and Ethnicity. Compared to San Mateo County, Belmont has a larger proportion of residents who identify as White, non-Hispanic and a smaller proportion of Hispanic residents. As shown in Figure II-1, Attachment C.6, 54% of Belmont residents are White, non-Hispanic versus 39% of the county and the Bay area overall. Twelve percent (12%) of Belmont residents are Hispanic, compared to 24% in the county and the Bay area overall [10] Belmont has become increasingly racially and ethnically diverse since 2000, largely due to growth in the Asian population (93% increase) and Hispanic population (57% increase) and a decline in the White, non-Hispanic population (17% decline).

Older residents are less diverse with 71% of the population older than 65 years identifying as White, compared to 58% of the population for children less than 18 years old.

By race and ethnic group in Belmont, poverty is highest for American Indian Alaskan Natives (41% live below the poverty line) and Black or African Americans (17%). These residents make up a very small proportion of the city (American Indian Alaskan Native residents totaled 61 in 2019 according to 5-year ACS data; Black or African Americans

[10] In Belmont, the share of the population that identifies as American Indian or Alaska Native is less than 1% (61 residents); Black/African American is 1% (275 residents); and Other Races is 4% (1,192 residents).

totaled 275), and, as such, reflect a small number of people living in poverty (approximately 25 American Indian Alaskan Natives and 47 Black or African Americans).

When examined by income range, the data show a mixed picture with American Indian Alaskan Natives also showing a large proportion of high-income households—exhibiting a split income distribution with no middle-income households.[11] Households with the most even income distribution include Black or African American and Hispanic or Latinx.

Geospatially, Belmont is split between census tracts with a sizeable gap of White majority residents, as shown in the White Majority Census Tracts map in Figure II-7, Attachment C.6. The census tracts identified as "Predominant[ly]" White majority are located in the far northwest and far southeast parts of the city, with the latter directly adjacent to White majority tracts that comprise most of San Carlos. Compared to northern jurisdictions in the county, Belmont has more White majority tracts; compared to southern jurisdictions of San Carlos, Woodside, and Menlo Park, Belmont has far fewer White majority tracts. White majority census tracts in Belmont are likely the result of historical and existing land use policies and practices. Land use regulations often influence the type of housing that is built in specific areas/neighborhoods of the city as well as demographic shifts. High costs of living and property values in Belmont are also contributing factors to segregation patterns as income groups varies by race and ethnicity. The city has no Asian majority tracts, no Hispanic majority tracts, and only one segregated neighborhood, as defined by the state Census tract with less than an even balance of racial groups; the far northwestern city Census tract is mostly comprised of Asian and White residents (Figure II-10, Attachment C.6).[12]

Belmont's diversity index is low to moderate. **The census tract with the highest diversity abuts Highway 101.** Data do not show this tract as having concentrations of vouchers or public housing, yet this tract does contain several apartment complexes.

Dissimilarity and Isolation Indices. The Dissimilarity Index, or DI, is a common tool that measures segregation in a community. The DI is an index that measures the degree to which two distinct groups are evenly distributed across a geographic area. The DI represents the percentage of a group's population that would have to move for each area in the county to have the same percentage of that group as the county overall.

DI values range from 0 to 100—where 0 is perfect integration and 100 is complete segregation. Dissimilarity index values between 0 and 39 generally indicate low segregation, values between 40 and 54 generally indicate moderate segregation, and values between 55 and 100 generally indicate a high level of segregation.

[11] A large margin of error due to the limited sampling of AIAN residents by the Census is also a factor.
[12] Redlining maps, otherwise known as Home Owners' Loan Corporation (HOLC) maps, are not available for San Mateo County.

In the Bay Area region, non-Hispanic White residents are more segregated than all other racial and ethnic groups, with the highest levels of segregation among Black and White residents. Segregation among Black and White residents in Belmont is similar to that of the Bay Area region, though rates of isolation among White residents have progressively decreased between 2000 and 2020. According to 2015 data, Belmont has a dissimilarity index of 0.165 among Black and White residents—this means that 16.5% of Black or White residents would need to move to a different neighborhood to create perfect integration among Black and White residents in Belmont.

The isolation index is interpreted as the probability that a randomly drawn minority resident shares an area with a member of the same minority. It ranges from 0 to 100 and higher values of isolation tend to indicate higher levels of segregation.

Isolation indexes among income groups in Belmont are similar to those among racial and ethnic groups. In Belmont, above moderate-income groups are the most isolated group with above moderate-income residents living in neighborhoods where 52.7% of residents are considered above moderate-income.

Segregation for income groups in Belmont is rather similar to segregation throughout the Bay Area region—though rates in Belmont are slightly lower. This is largely due to Belmont's relatively low population of low-income residents. For example, in 2015 low-income groups comprised 21.99% of Belmont's overall population—this compares to 28.7% in the Bay Area region.

Disability Status. The **share of the population living with at least one disability is 9% in Belmont** compared to 8% in San Mateo County. There are two census tracts in the city that have a 10% to 20% share of the population living with a disability; both are located in the central part of Belmont (Figure II-14, Attachment C.6). Geographic concentrations of people living with a disability may indicate a need for **increased access to services, amenities, and transportation that support this population**.

For example, according to the Resident Survey, Belmont residents with a disability are more likely to experience ambulatory difficulties (3.6%), followed by an independent living difficulty (3.2%) and cognitive difficulties (3.2%). Disabled persons in Belmont are least likely to experience vision difficulties (1.2%)—these data are presented in Figure III-18, Attachment C.6. Similar to geographic concentrations, disability type is important to identifying needs. For example, persons with an ambulatory difficulty may require additional funding for transportation and programs to improve disabled persons' ability to access public transit.

Familial Status. A majority of households in Belmont are made up of married-couples, and the city has a higher proportion of married-couple households (62%) than the county (55%) or Bay area overall (51%). Belmont has a similar share of single-person households as the county and Bay area but a smaller share of single parent households—10% in

Belmont versus 15% in the county and Bay area—as well as "other" household types, such as roommates (Figure II-17, Attachment C.6).

Familial status can indicate specific housing needs and preferences. A larger number of nonfamily or single person households indicates a higher share of seniors living alone, young adults living alone or with roommates, and unmarried partners. Higher shares of nonfamily households indicate an increased need for one and two bedroom units. Belmont is slowly aging (Figure II-15, Attachment C.6), yet the city does not have a disproportionately higher share of single-person households. This could change in the future—leading to **increased demand for in-home care and supportive services—if Belmont's older adults remain in their homes as they age.**

Belmont's owner-occupied homes are mostly 3 to 4 bedroom units, while rental units are mostly 1 to 2 bedroom (Figure II-20, Attachment C.6). This distribution aligns well with the distribution of household types. Compared to the county, Belmont has a smaller proportion of large (5 persons+) households (Figure II-16, Attachment C.6), which is partially due to the city's limited number rental units with 5 or more bedrooms and, to a lesser extent, 3 to 4 bedrooms.

In its analysis of housing needs for Belmont, the Association of Bay Area Governments (ABAG) reports that between 2010 and 2020, the number of single-family units in Belmont increased more than multi-family units: 33 new single-family detached homes were built compared to 18 attached homes, and 18 multi-family units. Belmont's share of single-family homes is about average for jurisdictions in the county, although there is a large variance in shares. For example, single-family homes comprise 58% of Belmont's housing stock compared to 44% of the City of San Mateo's, 56% of San Bruno's, 68% of San Carlos', and 98% of Atherton's.

Single parent households often have unique needs and need targeted programs and policies to keep and maintain their housing. In Belmont, single parent households—both single male householders and single female householders—comprise a small portion of households overall. Female-headed family households only comprise 7% of households in the city while male-headed family households comprise 3%. These rates are similar to that of San Mateo County and the Bay area, though Belmont has a lower rate among both household types. There are no census tracts with a concentration of single females with children in the city, this is likely due to the low number of households headed by single females (Figure II-22, Attachment C.6).

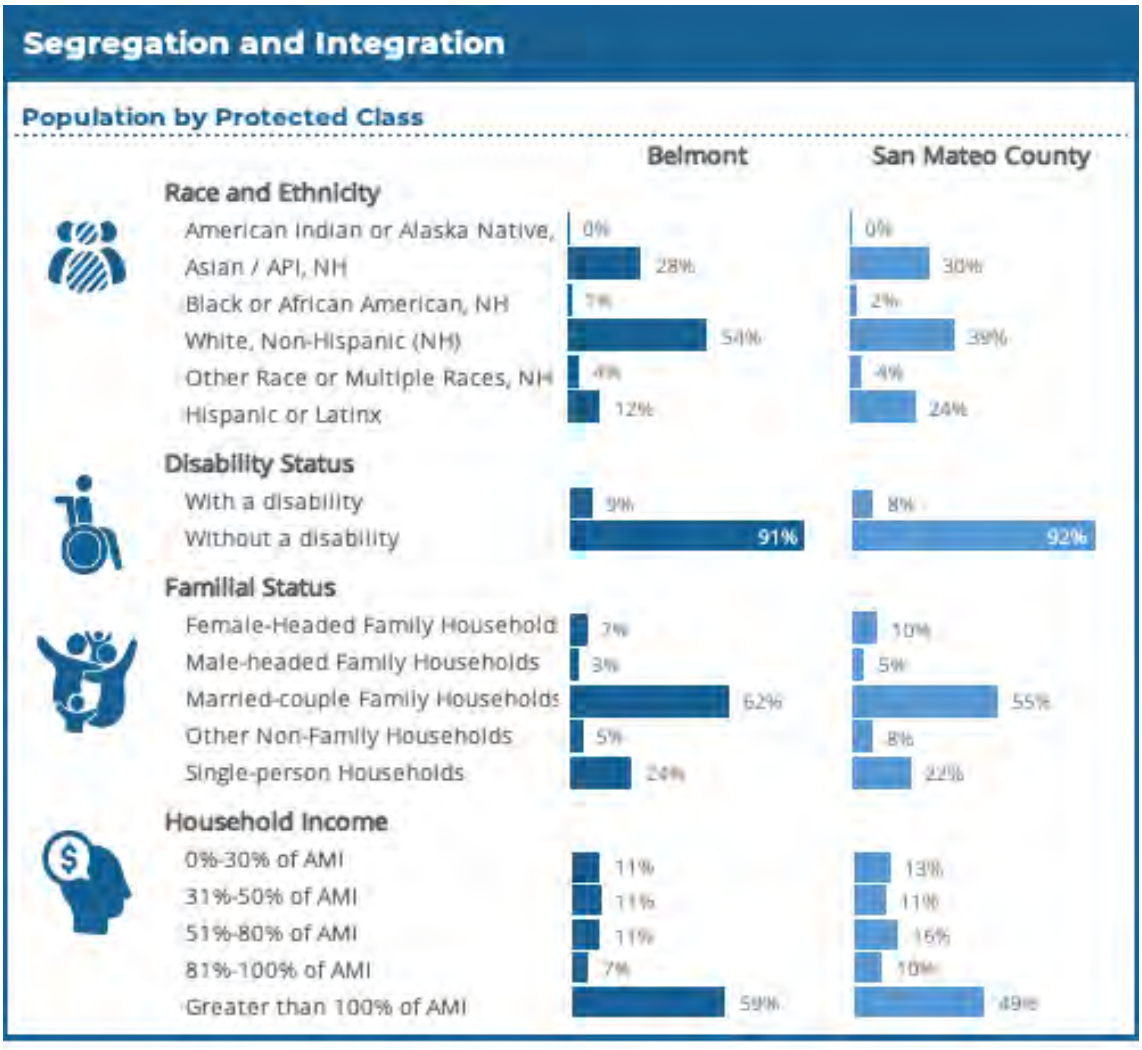
Female headed family households are more likely than male headed family households to be renters. As shown in Figure II-19, Attachment C.6, there are 394 renter-occupied female headed family households compared to 146 of male family households. However, more female headed family households own their home. In Belmont, there are 290 units owned by single female households compared to 171 of male headed family households.

Household Income. Compared to San Mateo County, Belmont has:

- **A much higher proportion of high-income households**: 59% of households in Belmont earn 100% of the AMI and more, versus 49% in the county;
- **A similar share of very low-income households** earning between 31% and 50% AMI and less (11% in Belmont, versus 11% in the county); and
- **A slightly lower share of extremely low-income households** earning less than 30% of AMI (11% in Belmont versus 13% in the county);
- **A much smaller share of middle-income households** earning between 50% and 100% AMI (18% in Belmont, versus 26% in the county).

The city also has fewer 0-30% AMI households than the Bay area overall as a proportion of total households, fewer middle-income households, and more high-income households.

Belmont's neighborhoods are all moderately high to very high-income, with no significantly concentrated low-income households (Figures II-26 and 27, Attachment C.6) or poverty



concentrations (Figure II-28, Attachment C.6). Compared to other jurisdictions, Belmont exhibits more variance in income distributions than others in the county when examined spatially by census block group (Figure II-27, Attachment C.6).

Racially or ethnically concentrated areas of poverty and affluence.

Racially Concentrated Area of Poverty or an Ethnically Concentrated Area of Poverty (R/ECAP) and Racially Concentrated Areas of Affluence (RCAAs) represent opposing ends of the segregation spectrum from racially or ethnically segregated areas with high poverty rates to affluent predominantly White neighborhoods. Historically, HUD has paid particular attention to R/ECAPs as a focus of policy and obligations to AFFH. Recent research out of the University of Minnesota Humphrey School of Public Affairs argues for the inclusion of RCAAs to acknowledge current and past policies that created and perpetuate these areas of high opportunity and exclusion.[13]

R/ECAPs

HCD and HUD's definition of a Racially/Ethnically Concentrated Area of Poverty is:

- A census tract that has a non-White population of 50% or more (majority-minority) or, for non-urban areas, 20%, AND a poverty rate of 40% or more; OR
- A census tract that has a non-white population of 50% or more (majority-minority) AND the poverty rate is three times the average tract poverty rate for the County, whichever is lower.

Source: California Department of Housing and Community Development Guidance, 2021.

It is important to note that R/ECAPs and RCAAs are not areas of focus because of racial and ethnic concentrations alone. This study recognizes that racial and ethnic clusters can be a part of fair housing choice if they occur in a non-discriminatory market. Rather, R/ECAPs are meant to identify areas where residents may have historically faced discrimination and continue to be challenged by limited economic opportunity, and conversely, RCAAs are meant to identify areas of particular advantage and exclusion.

For this study, the poverty threshold used was three times the average tract poverty rate for the County—or 19.1%. In addition to R/ECAPs that meet the HUD threshold, this study includes edge or emerging R/ECAPs which hit two thirds of the HUD defined threshold for poverty—emerging R/ECAPs in San Mateo County have two times the average tract poverty rate for the county (12.8%).

[13] Goetz, E. G., Damiano, A., & Williams, R. A. (2019). Racially Concentrated Areas of Affluence: A Preliminary Investigation. Cityscape: A Journal of Policy Development and Research, 21(1), 99–124

In 2010 there were three Census Tracts that qualify as R/ECAPs (19.4% poverty rate) in the county and 11 that qualify as edge R/ECAPs (13% poverty rate). None of the 2010 R/ECAPs or edge R/ECAPs were located in Belmont.

In 2019 there were two Census Tracts that qualify as R/ECAPs (19.1% poverty rate) in the county and 14 that qualify as edge R/ECAPs (12.8% poverty rate). None of the 2019 R/ECAPs or edge R/ECAPs were located in Belmont.

RCAAs.

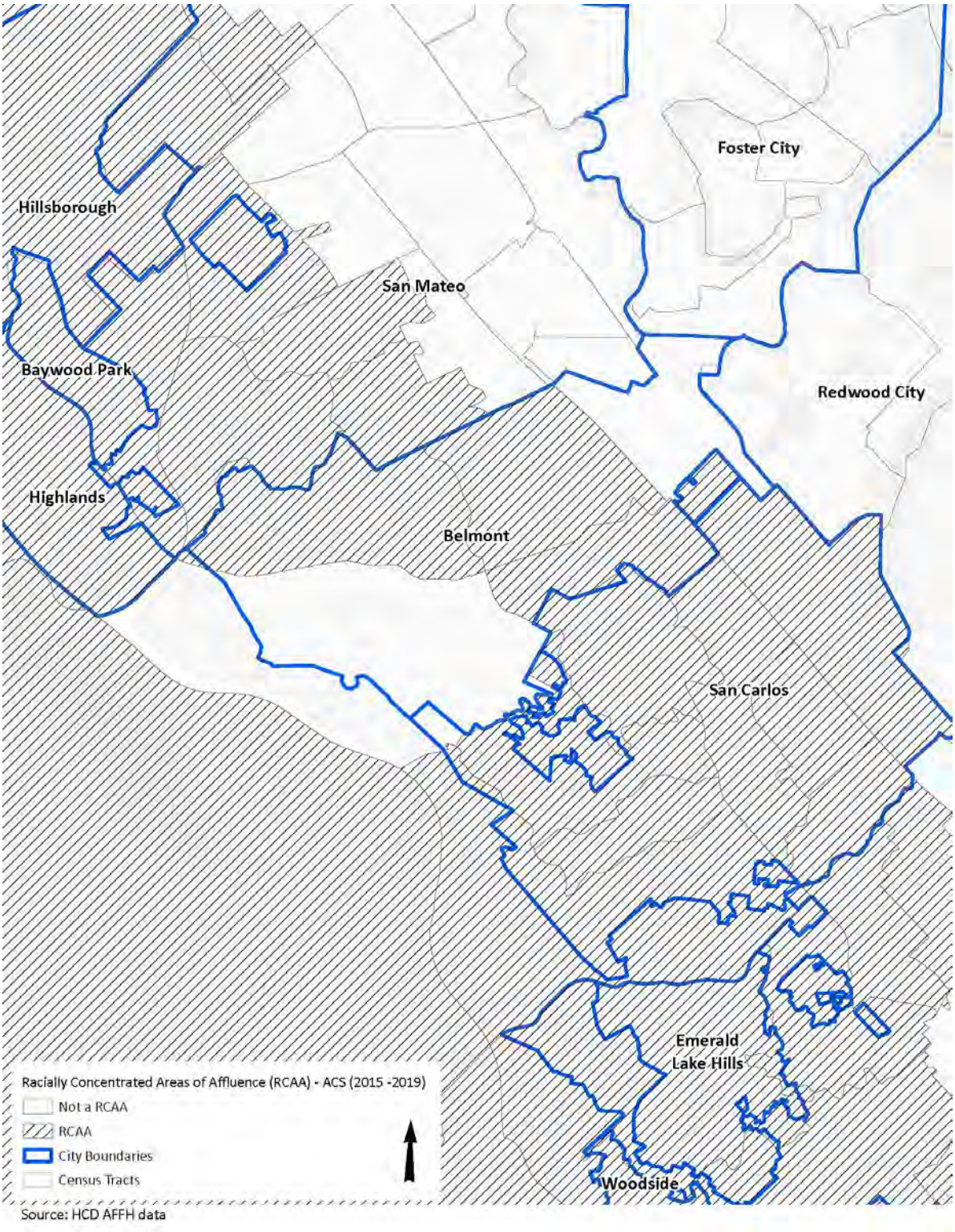
HCD's definition of a Racially Concentrated Area of Affluence is:

- A census tract that has a percentage of total white population that is 1.25 times higher than the average percentage of total white population in the given COG region, and a median income that was two times higher than the COG AMI.

As shown above, the majority of Belmont is considered an RCAA. Interestingly, census tracts where cost burdened renters live (discussed in following sections) are not a RCAA. Census tract 6086—which is not a RCAA—is surrounded by jurisdictions without RCAAs in their adjacent census tracts. Alternatively, census tract 6089 is surrounded by RCAAs. This suggests that Belmont residents in this tract are likely from lower-income and non-White households.

It is important to note that census tracts that are not RCAAs are located on the outer edges of the city. This geographic pattern in Belmont could suggest that lower-income and non-White households are being excluded. Contributing factors may include lack of civic participation in outlying areas. When dedicating funding and resources, geographic areas (and patterns) that are not a RCAA should be considered.

Figure C-1. Racially Concentrated Areas of Affluence (RCAAs), Belmont, 2015-2019



SECTION III. Access to Opportunity

This section discusses disparities in access to opportunity among protected classes including access to quality education, employment, transportation, and environment.

Access to Opportunity

"Access to opportunity is a concept to approximate place-based characteristics linked to critical life outcomes. Access to opportunity oftentimes means both improving the quality of life for residents of low-income communities, as well as supporting mobility and access to 'high resource' neighborhoods. This encompasses education, employment, economic development, safe and decent housing, low rates of violent crime, transportation, and other opportunities, including recreation, food and healthy environment (air, water, safe neighborhood, safety from environmental hazards, social services, and cultural institutions)."

Source: California Department of Housing and Community Development Guidance, 2021, page 34.

The California Tax Credit Allocation Committee (TCAC), in collaboration with HCD, developed a series of opportunity maps that help to identify areas of the community with good or poor access to opportunity for residents. The opportunity maps highlight areas of highest resource, high resource, moderate resource, moderate resource (rapidly changing), low resource and high segregation and poverty. TCAC provides opportunity maps for access to opportunity in quality education, employment, transportation, and environment. The TCAC opportunity maps are useful in comparing how well the sites identified for affordable housing and mixed-income development compare with opportunity access in a jurisdiction overall and against other neighborhoods. The overall goal of that analysis is to create a better balance in the siting of affordable housing among opportunity areas.

Education. TCAC's education score is based on math proficiency, reading proficiency, high school graduation rates, and the student poverty rate. According to TCAC's educational opportunity map, **all Census Tracts in Belmont have schools with the most positive educational outcomes.** Belmont offers a strong educational environment citywide.

The City of Belmont is served by the Sequoia Union High School District and the Belmont-Redwood Shores Elementary School District. Sequoia Union is fed by eight elementary school districts in the county.

Enrollment. Overall enrollment in the high school district increased 18% between the 2010-2011 and 2020-2021 school years. Enrollment fluctuated significantly among

Elementary School Districts, however, with the Belmont-Redwood Shore district far outpacing any other district for enrollment increases.

Between the 2010-2011 and 2019-2020 school years, **elementary school enrollment in the Belmont-Redwood Shores district increased by 35%,** or more than 1,000 students. Enrollment dropped slightly between the 2020 and 2021 school years (down 162 students), for an overall enrollment change of 30%.

Student diversity. The Belmont-Redwood Shores elementary student body has grown more racially and ethnically diverse since 2011, mostly due to an increase in Asian students (24% in 2010-2011 versus 32% in 2020-2021) and multi-race students (4% to 14%). The proportion of White students has declined (55% to 34%), while the proportion of Hispanic students has increased slightly (15% versus 12%).

Compared to the county overall, the Belmont-Redwood Shores Elementary School District has:

- A much larger share of Asian students (32% versus 17%),
- A lower share of Filipino students (3% versus 8%),
- A much lower share of Hispanic students (12% versus 38%),
- A slightly larger share of White students (34% versus 26%), and
- A much larger share of mixed-race students (14% versus 8%).

Enrollment of special student groups in Belmont-Redwood Shores has been relatively stable over time: 7% of students qualify for free and reduced lunch (FRL) and 10% are English language learners (versus 6% and 8%, respectively, in 2011). Even during the early part of the pandemic, when the county experienced a loss of English Language Learners (decline of 5%), the Belmont-Redwood Shores school district was able to retain these students.

Many schools have sought to increase their diversity of teaching and administrative staff to improve inclusivity for students of color. The gap in student and staff/teacher Hispanic representation is higher in the Sequoia Union High School District than in other districts in the county.

Extenuating circumstances. The Belmont-Redwood Shores district reports no students who are in foster care, are experiencing homelessness, or are members of migrant families as of the 2020-2021 school year. **Chronic absenteeism is low for students in the Belmont-Redwood Shores district overall, yet varies by student group**, with Hispanic and Pacific Islander students having relatively high rates (12% and 17%, respectively), and students with disabilities at 10%.

Test proficiency. Students in the Belmont-Redwood Shores district score well on state tests: 82% meet or exceed English language arts and literacy standards; 79% exceed

math standards. This compares to 62% (English) and 52% (math) for the county overall. However, this varies considerably by race and ethnicity, with 44% of Black or African American students and 64% of Hispanic students meeting or exceeding state English language arts standards and 37% of Black or African American students and 52% of Hispanic students meeting or exceeding state math standards.

Students with disabilities in the Belmont-Redwood Shores district do well compared to other districts: 43% of students with disabilities are proficient in math (only Hillsborough Elementary is higher at 48%), and 45% are proficient in English (Woodside is higher at 56%; Hillsborough at 47%).

College readiness. Many high schoolers in the county met admission standards for a University of California (UC) or California State University (CSU) school. Of the high school districts in San Mateo County, Sequoia Union had the highest rate of graduates who met such admission standards at 69% followed by San Mateo Union High with 68%. **Pacific Islander, Hispanic, and Black students in the San Mateo Union district were less likely to meet the admission standards** with rates of 29%, 46%, and 46% respectively.

Drop-out rates and suspensions. Although San Mateo Union High School has relatively low drop-out rates—4% of students—compared to other districts in the county, **drop-out rates among Pacific Islander (20%), Hispanic (16%), and Black (12%) students are significantly higher**.

Suspensions are disproportionately high for Hispanic students. Hispanic students make up 34% of the high school district student body, yet account for 66% of suspensions.

Employment. The professional and managerial services industry provides the largest number of jobs in Belmont and has increased the number of jobs faster than any other industry except for the information industry (Figure III-3, Attachment C.6). The health and educational services industry is the second largest provider of jobs in the city, with all other industries providing a much smaller share.

Belmont has a much lower job to household ratio when compared to the county, at 0.62 which is a decline from 0.75 in 2002. This compares to 1.59 for the county and 1.47 for the Bay area. The city is a net provider of workers to the region, mostly of high-wage workers, based on the jobs to workers ratio by wage (Figure III-5, Attachment C.6). The city also has a slightly lower unemployment rate than the county and Bay area.

TCAC's economic opportunity score is comprised of poverty, adult educational attainment, employment, job proximity, and median home value. Except for the census tract abutting Highway 101 and the south central tract that borders San Carlos, Belmont's neighborhoods are classified as having the most positive economic outcomes. These two outlier tracts have a higher incidence of lower-income households.

HUD's job proximity, which measures how close residents in a census tract can access jobs in the regional employment market (with larger employment centers weighted more heavily) shows that Belmont's proximity to jobs is about average—better than cities located further south but not as strong as cities to the north, who are closer to the City of San Francisco. According to the AARP Public Policy Institute, approximately 30,055 jobs in the city can be accessed by public transit while 108,262 jobs can only be accessed by car. Employment accessibility can provide barriers to economic success, especially if public transportation costs exceed what residents can afford. In 2022, the AARP Public Policy Institute estimated that household transportation costs were $15,354 per year. Cost and severely cost burdened households will likely struggle to afford public transportation if yearly public transit expenses increase.

Economic outcomes are also reliant on broadband and internet access. In 2022, 99.8% of Belmont residents had access to high-speed internet—this likely contributes to positive scores in the city. However, Belmont does not have policies in place to remove barriers for residents without broadband access; however, County CDBG funding could be used for this purpose.[14]

As will be discussed below, persons with disabilities do not appear to face unique barriers in accessing employment and employment opportunities. According to ABAG data, employment and unemployment rates among disabled persons and persons without a disability are relatively similar.

Transportation. SamTrans provides bus services in San Mateo County including Redi-Wheels paratransit service. The San Mateo County Transit District acts as the administrative body for transit and transportation programs in the county including SamTrans and the Caltrain commuter rail.

In 2018, the Metropolitan Transportation Commission (MTC), which covers the entire Bay Area, adopted a coordinated public transit and human services transportation plan. While developing the coordinated plan, the MTC conducted extensive community outreach about transportation within the area. That plan—which was developed by assessing the effectiveness of how well seniors, persons with disabilities, veterans, and people with low incomes are served—was reviewed to determine gaps in services in Belmont and the county overall[15].

Although Belmont was not mentioned specifically in the plan, its residents with public transportation needs have not grown significantly. Even if public transportation needs have not grown, Belmont residents still face difficulty in accessing public transit options. According to findings from the 21 Elements Resident Survey, 19% of Belmont respondents find it difficult to access public transit safely and easily (e.g., bus or light rail). This is 25%

[14] https://livabilityindex.aarp.org/search/Belmont,%20California,%20United%20States.
[15] https://mtc.ca.gov/sites/default/files/MTC_Coordinated_Plan.pdf

above that of the region. Accessing public transit is also difficult for residents in Brisbane (29%), Hillsborough (25%), Pacifica (21%), and Half Moon Bay (18%). Relatedly, 14% of Belmont respondents indicated that city buses/rails do not go where residents need to go or operate during the times they need. Thirty-one percent (31%) of Belmont residents also reported living in neighborhoods without adequate walking areas—this rate is 25% above that of the county overall.

Belmont has taken steps to remove barriers for disabled persons in accessing public transportation. For instance, 89% of public transit stations comply with regulations established by the Americans with Disabilities Act (ADA). San Mateo County and Belmont also have Transit Oriented Development (TOD) programs to improve walkability surrounding transit stations and access to transit stops.

In the county overall, the primary gaps in transportation access include:

- The "spatial gaps" in public transportation continue to be a challenge. Lack of connectivity can make it very difficult for populations reliant on public transit to access the region.
- Transit and paratransit systems lack service in the evenings, late at night, and on weekends—which can limit users' access to jobs, education, and entertainment.
- The areas in the region that are aging the fastest are suburban and rural in nature—and can be difficult to serve by fixed-route transit.
- Fees to access transit and paratransit are too high for many low- and fixed-income households.
- Funding needs are growing faster than revenues.

A partnership between the World Institute on Disability and the MTC created the research and community engagement project TRACS (Transportation Resilience, Accessibility & Climate Sustainability). The project's overall goal is to, "stimulate connection and communication between the community of seniors and people with disabilities together with the transportation system– the agencies in the region local to the San Francisco bay, served by MTC."[16] TRACS highlights that improving accessibility requires engagement for the community because there are no "watch-dog" systems in place to hold agencies accountable.

As part of the TRACS outreach process, respondents were asked to share their compliments or good experiences with MTC transit. One respondent who had used multiple services said, **"it is my sense that SamTrans is the best Bay Area transit provider in terms of overall disability accommodation."**

[16] https://wid.org/transportation-accessibility/

The San Mateo County Transit District updated their Mobility Plan for Older Adults and People with Disabilities in 2018. According to the district, the **county's senior population is expected to grow more than 70% over the next 20 years and the district is experiencing unprecedented increases in paratransit ridership**. The plan is targeted at developing effective mobility programs for residents with disabilities and older adults including viable alternatives to paratransit, partnerships, and leveraging funding sources.[17]

MTC also launched Clipper START—an 18 month pilot project— in 2020 which provides fare discounts on single transit rides for riders whose household income is no more than double the federal poverty level.[18]

Environment. TCAC's opportunity areas environmental scores are based on the CalEnviroScreen 4.0 indicators which include pollution metrics such as ozone, PM2.5, diesel PM, drinking water, pesticides, toxic release, traffic, cleanup sites, groundwater threats, hazardous waste, impaired water bodies, and solid waste sites.

Belmont **scores moderately-high on environmental outcomes**. The one census tract that abuts Highway 101 has the lowest environmental score in the city; this is also the tract with the most diversity of housing types. The reason for this score is primarily the result of exposure to traffic and the resulting pollution from vehicle traffic. It is important to note that no housing opportunity sites are located in the area next to Highway 101in this tract to ensure no additional concentration of housing units next to the freeway.

All of Belmont's neighborhoods have the strongest measures in the **California Healthy Places Index (HPI)** (Figure III-11, Attachment C.6) developed by the Public Health Alliance of Southern California (PHASC). The HPI includes 25 community characteristics in eight categories including economic, social, education, transportation, neighborhood, housing, clean environment, and healthcare.[19] This index suggests that all parts of Belmont provide residents access to healthy environments as measured by the index.

Despite having a comparatively high HPI, Belmont residents do face environmental hazards. The AARP Public Policy Institute provides livability indexes[20] for all cities and counties based on categories such as housing, neighborhood characteristics (e.g., access to grocery stores), transportation, environment, health, engagement, and opportunity. According to the AARP Public Policy Institute, Belmont has an environmental index of 46 (out of 100). This index is based on the city's drinking water and air quality and near-roadway pollution. In 2022, 0.04% of Belmont residents are exposed to drinking water violations and there are 7.3 unhealthy air quality days per year—this represents an increase from 0% of people exposed to poor drinking water in 2015 and 1 unhealthy air

[17] https://www.samtrans.com/Planning/Planning_and_Research/Mobility_Plan_for_Older_Adults_and_People_with_Disabilities.html
[18] https://mtc.ca.gov/planning/transportation/access-equity-mobility/clipperr-startsm
[19] https://healthyplacesindex.org/about/
[20] Livability indexes provided by the AARP Public Policy Institute are based on data from the US Census Bureau, ACS data, and related city and county policies.

quality day per year in 2015. The environmental index provided by AARP also shows that 28% of residents were exposed to near-roadway pollution in 2022.

Environmental constraints. The City of Belmont released a report on the city's Housing Constraints.[21] The report includes environmental constraints in the city and how these constraints impact residential development and development costs. According to the report, Belmont experiences environmental issues ranging from suitable land for development, the provision of adequate infrastructure, and energy costs.

As stated in the Housing Constraints report, Belmont encompasses approximately 2,955 acres and the majority of the city's parcels are developed. Undeveloped parcels are in the Western Hills area with small amounts in the San Juan area and areas east of Highway 101. However, Belmont identified numerous environmental constraints on development in these areas including steep slopes, landslide hazards, fire hazards, and flood hazards. Other constraints outlined in the report include seismic hazards, topography/slope, sea level rise, and water/sewer capacity.

Disparities in Access to Opportunity. Because Belmont is classified as a high resource area throughout and lacks racial and ethnic concentrations, the distribution of residents among high resource areas matches the city's racial and ethnic distribution (Figure III-12, Attachment C.6).

TCAC's composite opportunity score for Belmont shows all but one census tract as "highest resource." The census tract bordering Highway 101 is classified as "high resource."

The Social Vulnerability Index (SVI) provided by the Centers for Disease Control (CDC)—ranks census tracts based on their ability to respond to a disaster—includes four themes of socioeconomic status, household composition, race or ethnicity, and housing and transportation. Belmont is rated as having low to moderately-low vulnerability to disasters (Figure III-15, Attachment C.6).

Belmont does not have any disadvantaged communities as defined under SB 535, "disadvantaged communities are defined as the top 25% scoring areas from CalEnviroScreen along with other areas with high amounts of pollution and low populations."[22]

[21] https://www.belmont.gov/home/showpublisheddocument/21605/637921852304683878.
[22] https://oehha.ca.gov/calenviroscreen/sb535

Disability

"Disability types include hearing difficulty, vision difficulty, cognitive difficulty, ambulatory difficulty, self-care difficulty, and independent living difficulty."

Source: California Department of Housing and Community Development Guidance, 2021, page 36.

Disparities Specific to the Population Living with a Disability. Nine percent (9%) of the population in Belmont is living with at least one disability, compared to 8% in the county. The most common disabilities in the city are ambulatory (3.6%), independent living (3.2%), and cognitive (3.2%).

For the population 65 and over the share of the population with an ambulatory or independent living difficulty increases significantly—to 14.4% of the senior population. Should Belmont's seniors choose to age in place, demand for in-home care, paratransit, and accessibility improvements will increase.

Persons with disabilities have unique needs and often face greater barriers in finding housing that meets their needs, accessing employment opportunities, and accessing public transportation. This section provides an in-depth analysis of these needs and Belmont's progress in meeting them.

Disabled persons living in Belmont are more likely to have an ambulatory difficulty (3.6%), followed by an independent living difficulty (3.2%) and cognitive difficulties (3.2%). Only 1.2% of disabled persons in the city have a vision difficulty. Although persons with disabilities often face greater barriers in accessing jobs and employment opportunities, employment rates among Belmont's population of disabled persons is similar to that of non-disabled residents. As shown in Figure III-20, Attachment C.6, 95% of disabled residents are employed, only 5% are unemployed. For residents without a disability, 97% are employed and 3% unemployed. Employment rates for disabled persons in Belmont suggest that persons with disabilities do not—on average—experience disparities in accessing employment opportunities.

Belmont has made various efforts to improve disabled persons' ability to access housing, employment, and supportive services. Belmont supports and provides housing for persons with disabilities (including developmental disabilities). The city currently owns two low- and very low-income group homes for adults with developmental disabilities. Belmont also works closely with the Center for Independence of Individuals with Disabilities (CID) to provide disabled residents with services including housing accessibility modifications, independent living skills training, and peer counseling. In the city's Notice of ADA Compliance,[23] Belmont committed the city to improving communication to ensure that all

[23] https://www.belmont.gov/home/showdocument?id=16121.

disabled persons can participate in all city programs, services, and activities. More specifically, Belmont will—upon request—provide aids and services for effective communications including sign language interpreters and documents in Braille (or alternative formats) to provide accessible information and communication to people with speech, hearing, vision, or cognitive impairments. Expanding on this, Belmont modified its city codes to allow individuals with service animals in city offices and facilities—even if pets are prohibited. The city also designated an ADA Coordinator to maintain, track, and address discrimination cases and accessibility barriers.

In 2018, the city developed a Transition Plan—based on the city's 2017 self-evaluation report—to determine which facilities and neighborhood infrastructure must be changed to remain compliant with the Americans with Disabilities Act (ADA).[24] To develop the plan, Belmont evaluated existing policies and practices, identified obstacles that limit accessibility, set numerous priorities for barrier elimination, and launched community events at senior centers to gather input from the city's population of disabled persons. Below is a list of proposed measures, practices, and policies for Belmont to implement to address accessibility problems and incidents of discrimination on the basis of disability status.

- Implement a formal policy to address federal and state legal requirements—this policy would institutionalize organizational procedures to address accessibility features if and when they fail (e.g., accessible elevators);
- Establish an annual General Fund dedicated to mitigating accessibility barriers;
- Find funding sources including funds associated with the city's Capital Improvement project funds and existing city projects; and
- Provide accessible features including—but not limited to—accessible routes, ramps, and elevators.

According to community input, accessibility concerns are largely based on daily travel routes and sidewalks. One participant, for instance, shared that city streets only have shoulders—this has forced disabled persons to share the street with vehicles. The city also lacks curb ramps allowing for transitions between streets to areas with limited segments of sidewalks. Other accessibility concerns include tripping hazards due to sidewalk and intersection barriers.

Findings from the 21 Elements Resident Survey support feedback from residents. Belmont residents—regardless of disability status—identified neighborhood infrastructure as the greatest housing and neighborhood challenges they encounter. In fact, residents in Belmont experience problems such as bad sidewalks and no lighting more acutely than the county overall. Thirty-one percent (31%) of Belmont respondents identified these problems

[24] https://www.belmont.gov/home/showpublisheddocument/19520/637240186694170000.

as the greatest challenge they face—this is similar to feedback from residents in East Palo Alto (40%), Daly City (25%), and Hillsborough (23%).

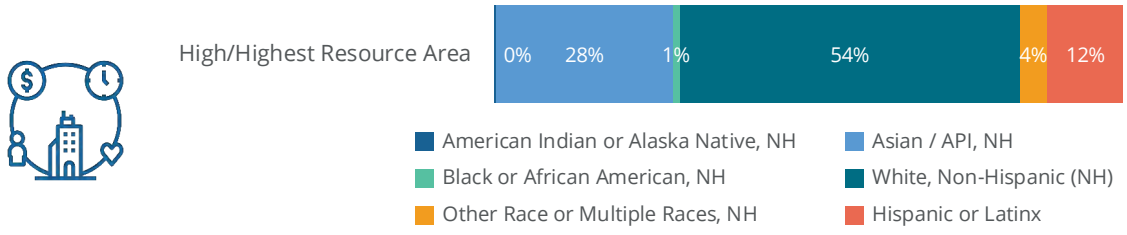
Actions the city has taken to improve accessibility features and further accommodate their population of disabled persons have been largely successful—especially in terms of providing housing that meets residents' accessibility needs. Findings from the 21 Elements Resident Survey demonstrate Belmont's progress in providing housing opportunity and supportive services. For example, the resident survey asked respondents—with a disability—to share their perspective on their housing situations (e.g., accessibility improvements). Eighty-nine percent (89%) of disabled persons in Belmont reported living in housing that met their needs. Of those who do not live in such housing, 62% of respondents reported needing grab bars in their bathroom and/or a bench in their shower and 67% need supportive services to help them take care of themselves or their home. These results are substantially more positive than feedback collected from the county overall—74% of all respondents in San Mateo County indicated that their housing situation does meet their accessibility needs. Accessibility features and services that Belmont residents need are similar to that of the county overall.

Access to Opportunity

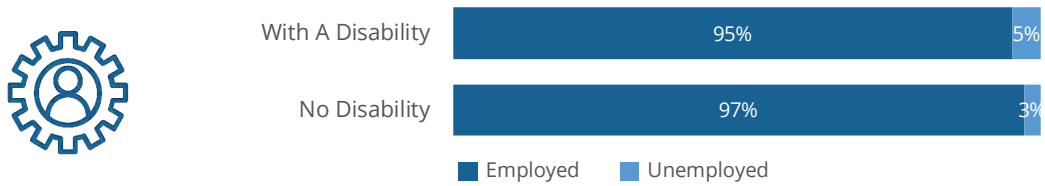
Regional Access

	Belmont	San Mateo County
Jobs to Household Ratio	0.62	1.59
Unemployment Rate	5%	6%
LEP Population	4%	7%

Share of Population by Race in Resource Areas



Employment by Disability Status



SECTION IV. Disproportionate Housing Needs

This section discusses disparate housing needs for protected classes including cost burden and severe cost burden, overcrowding, substandard housing conditions, homelessness, displacement, and other considerations.

Disproportionate Housing Needs

"Disproportionate housing needs generally refers to a condition in which there are significant disparities in the proportion of members of a protected class experiencing a category of housing need when compared to the proportion of members of any other relevant groups, or the total population experiencing that category of housing need in the applicable geographic area. For purposes of this definition, categories of housing need are based on such factors as cost burden and severe cost burden, overcrowding, homelessness, and substandard housing conditions."

Source: California Department of Housing and Community Development Guidance, 2021, page 39.

Housing Needs. According to ABAG, the population of Belmont increased by 6.7% from 2000 to 2020, which is below the growth rate of the Bay area. However, the city's population growth has generally been in line with the county.

ABAG also reports that the number of homes in Belmont increased, 0.6% from 2010 to 2020, below the growth rate for San Mateo County and the broader region.

A total of 240 building permits were issued in Belmont between 2015 and 2020. Of those:

- 138, or 57.5% were for above moderate-income units,
- 36, or 15% were for moderate-income units,
- 44, of 18.3% for low-income units, and
- 22, or 9%, for very low-income units.
- Altogether, more than one-fourth of the permits were for low and very low-income units.

The majority of the housing inventory in Belmont was built between 1940 and 1960 (5,131 units), followed by 1960 to 1979 (3,358 units). **The number of units built after 2010 (470) is three times the number built between 2000 and 2009 (just 149)—a positive trend for addressing housing gaps.** The age of Belmont's housing stock is especially important for city officials to consider when establishing programs for housing rehabilitation. The

needs analysis estimates that there are approximately 1,311 total units needing rehabilitation, from minor repairs to substantial rehabilitation.

Belmont has a much larger share of owner-occupied units priced between $1 million and $2 million than the county—65% of units in the city fall within this price range compared to 37% in the county. Just 18% of Belmont's owner-occupied units are priced below $1 million, compared to 44% for the county and 65% for the Bay area overall.

According to the Zillow home value index, home prices have experienced remarkable growth in the city and county since 2011, with Belmont's prices accelerating faster than the county or Bay area overall (Figure IV-5, Attachment C.6).

Rents in Belmont have increased at the same pace as in the county and remain about 30% higher than rents in the Bay area overall. Belmont's rental distribution is more closely aligned with the county's overall but much less affordable than the Bay area overall (Figure IV-6, Attachment C.6). In Belmont, 65% of rental units are priced at $2,000 or more, compared to 59% in the county, and 42% for the Bay area overall.

Condition of Housing Stock. Despite Belmont having a relatively younger housing stock, residents seem to face housing condition challenges at higher rates than the county overall. In the 21 Elements Resident Survey, 15% of respondents from Belmont indicated that their home or apartment is in bad condition while 10% reported having bed bugs, insects, or a rodent infestation—both of which are 25% above the regional average. Additionally, 22% of respondents reported that their home or apartment is not big enough for their family. These findings supplement housing data and provide greater direction for the city when identifying rehabilitation programs and policies.

Cost Burden and Overpayment. Belmont households face lower rates of cost burden—spending more than 30% of gross income on housing costs—than in the county and Bay area overall[25]. Seventeen percent (17%) of Belmont households are cost burdened (versus 20% in the county) and 13% are severely cost burdened (versus 17% in the county), spending more than 50% of their gross income on housing costs. Cost burdened households have less money to spend on other essentials like groceries, transportation, education, healthcare, and childcare. Extremely cost burdened households are considered at risk for homelessness.

Cost burden is much higher for renters: in Belmont, 47% of renters are cost burdened compared with 21% of owners. **Nearly all of Belmont's households earning 30% of AMI and less are burdened**, with the vast majority severely burdened (Figure IV-10, Attachment C.6). The level of burden diminishes greatly once households earn 80% of AMI and more.

[25] Cost burden and severe cost burden are HUD and industry standard metrics.

Cost burden varies across residents of different races and ethnicities. Black or African American households, mixed race households, and Hispanic households are most likely to face severe cost burden, with rates ranging from 25% to 30%. Asian households are the least likely to be severely burdened, at 9%. Overpayment also varies by household size. Belmont's large family households— households with five or more persons—are less likely to be cost burdened than other households. In fact, 79% of large households are not cost burdened compared to 66% of other households. Relatedly, only 21% of large family households are cost burdened while 34% of other households overpay for their housing.

Figures IV-13 and IV-14, Attachment C.6 show the geographic distribution of overpayment rates among homeowners and renters in Belmont. Although there are no highly concentrated areas of overpayment in the city, the largest portion of renters overpaying for their housing are concentrated in census tracts 6086 and 6089. In census tracts 6088 and 6090, 20% to 40% of renters are cost burdened. No census tract in Belmont has less than 20% of renters experiencing cost burden. Excluding census tract 6089 where less than 20% of homeowners overpay for their housing, all census tracts in Belmont show 20% to 40% of cost burdened owners. It is important to note that areas where renters are more likely to be cost burdened (census tract 6089) is the one location where the least number of homeowners overpay. As shown in Figure IV-29, Attachment C.6, census tract 6088 is one of the more expensive areas in the city—this census tract has the smallest proportion of overpaying homeowners.

Overcrowding. The vast majority of households (95%) in Belmont are not overcrowded—indicated by more than one occupant per room. See Figure IV-19 in Attachment C.6. Renter households make up the vast majority of the city's households living in overcrowded conditions. Asians and persons of Hispanic descent have much higher rates of overcrowding than others: 7.8% of Asian residents live in overcrowded conditions and 10% of Hispanic residents live in overcrowded conditions. These compare with 2.8% of non-Hispanic White residents.

By race and ethnicity, the city's Hispanic and mixed-race households are the most likely to be living in overcrowded conditions. Belmont has no geographic concentrations of overcrowded households, as shown in the map below. Belmont is similar to Foster City, Hillsborough, and Burlingame for overcrowding. Nearby City of San Mateo and San Carlos each have one tract with moderate overcrowding (8.3% to 12%).

Substandard Housing. Renter households are also more likely to have substandard kitchen and plumbing facilities compared to owner households. Of the city's renters, 6.6% are lacking kitchen facilities, while less than 1% are lacking plumbing. For owners, less than 1% are lacking either kitchen or plumbing facilities. Rates of substandard housing in Belmont are relatively low, however, city residents do face housing condition challenges outside of the four substandard housing conditions identified by HUD. The condition of the city's housing stock is explained in greater detail above.

As noted in the Housing Needs Appendix, a summary of the most common code enforcement activity provided by the Code Enforcement Officer includes residential yard and tree maintenance, illegal dumping, construction without permits, abandoned/inoperable vehicles, smoking in multi-family residential units (prohibited in Belmont), trash and debris in public view, rodent infestation and dilapidated property fences. None of these frequent violation types provides insight into the estimated number of housing units in need of rehabilitation. Additionally, the code enforcement officer has confirmed that estimating rehabilitation needs based on age of housing stock is a reasonable measure. There do not appear to be any visual housing stock trends (i.e. boarded up windows/doors, roof or other structural damage, significant external damage) in Belmont that would guide housing rehabilitation needs/services.

Homelessness. In 2019, 1,512 people were experiencing homelessness in the county, 40% of people were in emergency or transitional shelter while the remaining 60% were unsheltered. The majority of unsheltered people experiencing homelessness were in households without children. The majority of people in transitional housing were in households with children. **People who identified as American Indian or Alaskan Native (6% homeless but represent less than 1% of the general population), Black (13%, 2%), White (67%, 51%), and Hispanic (38%, 28%) are overrepresented in the homeless population** compared to their share of the general population. People struggling with chronic substance abuse (112 people), severe mental illness (305), and domestic violence (127) represent a substantial share of the homeless population in 2019.

The City has no local data on homelessness to the extent needed for this analysis because it was not collected during the last homeless count. That said, the City is an active participant in the 21 Elements group as well as the Countywide CoC. In addition, the Housing Element Implementation Plan contains actions to ensure that transition housing, supportive housing, and shelters are permitted in every zoning district where housing is allowed.

Displacement and Retaining Assisted Units. Belmont has 106 low-income affordable units at risk of converting to market rate units. The risk of these units converting to market rate is low, however, according to the California Housing Partnership. Low risk is defined as units that are at risk of converting in a longer timeframe (10+ years) and which are currently owned by a large and/or stable nonprofit, mission-driven developer.

According to the Urban Displacement Project, three census tract in the city—two abutting Highway 101 and one abutting Highway 280—are at risk of "becoming exclusive." This is based on a large rise in the home value and rent change in the census tracts between 2012 and 2018. These tracts also have high shares of renter households. As shown in Figure IV-28, Attachment C.6, there are two census tracts in Belmont that are considered at risk of displacement—census tract 6089 and part of census tract 6086.

Findings from the 21 Elements Resident Survey support census tract data from the Urban Development Project. Survey results indicate that Belmont faces greater risks of displacement than the overall region. Overall, 21% of respondents reported that they had been displaced from their housing in the past five years. Comparatively, 29% of Belmont respondents reported being displaced. Top reasons for displacement in Belmont include apartment rules (30%), rent increased more than they could pay (25%), and landlord refused to renew their lease (25%). Residents displaced from rent increases will likely continue if home values and rent changes follow patterns between 2012 and 2018.

Of all households in Belmont that reported being displaced in the resident survey, 45% of children had to change schools. This is a lower rate than the county overall where 60% of children in displaced households had to change schools. Despite having a lower rate, displacement is a major challenge for children and heavily influences education outcomes. According to the survey, displaced children in Belmont experienced negative outcomes from changing schools. Top school change outcomes reported by Belmont respondents include: they are in a worse school (44%), the school is more challenging (33%), and they feel less safe at their new school (33%).

Displacement can occur due to natural disasters (e.g., flooding, wildfires) as well. According to the 2012 Flood Insurance Rate Map (FIRM)—adopted by the Federal Emergency Management Agency (FEMA)—flooding hazards generally follow Belmont Creek. To reduce flooding hazards in areas surrounding Belmont Creek, the city had adopted a stormwater management program and additional regulations related to floodplain management. These regulations were adopted and integrated in the city's Municipal Code (Sections 7-201 through 7-222).

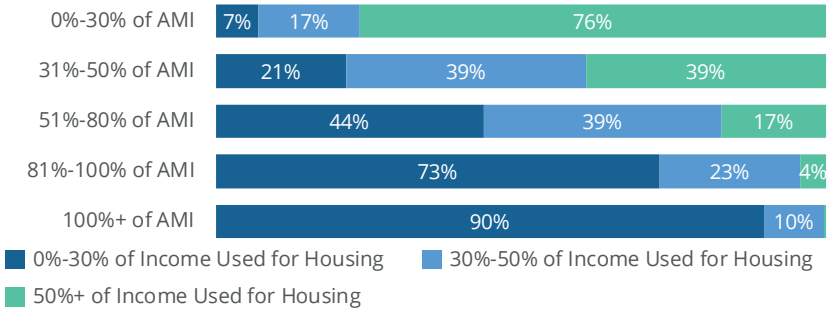
To assist displaced residents, the city is considering an anti-displacement policy and housing preference policy. The housing preference policy will prioritize residents applying for housing that have been displaced from a unit in the past three years. Belmont is also working towards establishing foreclosure avoidance programs, an eviction prevention ordinance, and increased funding for fair housing legal services. There is a need for additional preservation and anti-displacement efforts. These efforts should focus on units located near Highway 101 to facilitate access to services, transit, employment, and quality education in the city and surrounding areas.

Access to mortgage loans. Disparities by race and ethnicity are also prevalent for home mortgage applications, particularly in denial rates. **Hispanic mortgage loan applicants (29% denial rate), American Indian or Alaska Native households (33% denial rate), and Black or African American households (27% rate) had the highest denial rates for mortgage loan** applications in 2018 and 2019. These compare to 14% for Asian applicants and 20% for White applicants.

Disproportionate Housing Needs

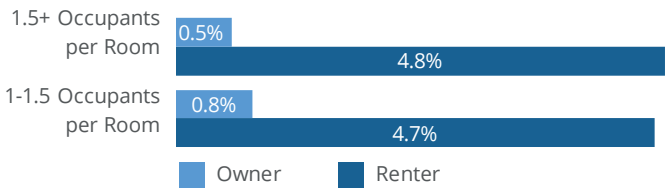
Cost Burden. Belmont, 2019





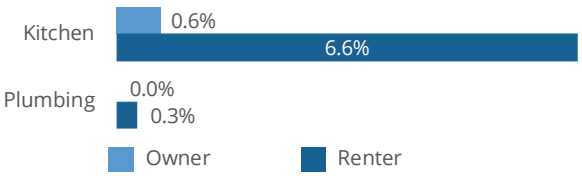
Overcrowding, Belmont, 2019





Substandard Housing, Belmont, 2019





Homelessness, San Mateo County, 2019



Race and Ethnicity	Share of Homeless Population	Share of Overall Population
American Indian or Alaska Native	6%	0%
Asian / API	6%	30%
Black or African American	13%	2%
White	67%	51%
Other Race or Multiple Races	8%	17%

Displacement, Belmont, 2019



Assisted Units at High or Very High Risk of Displacement	Belmont	San Mateo County
Number of Units	0	417
% of Assisted Units	**0%**	**8%**

SECTION V. Site Inventory Analysis

AB 686 requires an analysis of sites identified to meet RHNA obligations for their ability to affirmatively further fair housing.

Census Tract Sites Analysis

The City's proposed RHNA sites can accommodate approximately 1,176 new units and 1,023 pending and pipeline units. Table C-1 shows the distribution of those units across Census Tracts, in addition to the proportion of the population that identifies as Hispanic, the non-White share of the population, the share of low and moderate-income households, the number of R/ECAPS and RCAAs, TCAC's opportunity score for all Census Tracts in the city. Figure 2 shows the distribution of the City's proposed sites geographically.

Census Tract 6086

Characteristics. Census Tract 6086 is located east of CA-82 adjacent to Redwood City and Foster City to the east. The area is predominantly commercial uses along CA-82 and Highway 101. There are several lower density single-family neighborhoods and large apartment communities within the Tract. St. Mark Catholic Church, Nesbit Elementary School, various hotels, and a Caltrain Station are also located within this Census Tract. According to TCAC's opportunity area map, the Census Tract is a high resource area. There is a moderate share of low or moderate-income households (37% of households in the Tract). The majority of the population in this Tract are non-White (62%) and one in five (20%) identify as Hispanic. The Tract is not an R/ECAP or RCAA and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations.

Assessment. The addition of 958 site inventory units including 344 for low and moderate-income (LMI) households may contribute to existing concentrations of non-White and LMI households in Belmont. However, Belmont as a whole is less diverse than San Mateo County overall. The demographics of this Census Tract are similar to the larger County. Neighborhoods in this area are established and provide opportunities for mixed-income households—characterized by stable moderate/mixed-income by the Urban Displacement typologies. The introduction of affordable units for low-income households could help prevent the Tract from gentrification and displacement. **The addition of 44% of the City's proposed units within this Census Tract may modestly raise the overall proportion of low and moderate-income households within this Tract. However, these sites also provide access to the high resource areas and transportation as well as help to prevent displacement of renters from the Downtown area.**

Considerations. 958 site inventory units are proposed in Census Tract 6086, including 345 units for LMI households and 613 units for above moderate-income households, 633 of which are pipeline units.

Census Tract 6087

Characteristics. Census Tract 6087 is located between the City's border to the north, CA-82 to the east, Ralston Avenue to the south, and Alameda de las Pulgas to the west. The area is predominantly low density single-family with commercial uses along CA-82 to the east. Barrett Community Center, Notre Dame High School, Notre Dame Elementary School, Notre Dame de Namur University, and several community parks are also located within this Census Tract. Generally, the Census Tract is ranked as a highest resource area according to the TCAC's opportunity areas and contains a moderate share of low- or moderate-income households (31% of households in the Tract). The majority of the population in this Tract are non-White (53%) and 12% identify as Hispanic. Finally, the Tract is not an R/ECAP and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations.. This Census Tract is an RCAA.

Assessment. The addition of 785 site inventory units, including 518 for LMI households, will help stabilize this area and provide continued opportunities for LMI households to live in this highest resource Census Tract. Neighborhoods in this area are at risk of becoming exclusive, as characterized by the Urban Displacement definitions. The introduction of affordable units for low-income households in this at-risk area could help prevent the Tract from gentrification and displacement. The addition of 36% of the City's total proposed units within this Census Tract may modestly raise the overall proportion of low and moderate-income households within this Tract. However, this Census Tract is an RCAA and highest resource area that is at-risk of becoming exclusive. Integrating additional housing units in this area is imperative to stabilize the neighborhood and prevent it from becoming exclusive.

Considerations. 785 site inventory units are proposed in Census Tract 6087, including 518 for LMI households and 267 units for above moderate-income households, 186 of which are pipeline units.

Census Tract 6088

Characteristics. Census Tract 6088 is located between the City's border to the north, Alameda de las Pulgas to the east, Ralston Avenue to the south, and the City's border to the west. The area is entirely very low density single-family, open space, and neighborhood uses. Cipriani Elementary School, dog park, San Juan Canyon Open Space, and Fellowship Bible Church are also located within this Census Tract. Generally, the Census Tract is ranked as a highest resource area according to the TCAC's opportunity areas and contains the lowest share of LMI households (14% of households in the Tract) compared to other Tracts in the City. Less than half of the population in this Tract is non-White (44%) and 8% identify as Hispanic. Finally, the Tract is not an R/ECAP and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations. This Census Tract is an RCAA.

Assessment. Only 14 site inventory units including 11 for LMI households are proposed in this Census Tract. Neighborhoods in this area are established and unaffordable to low-income households—characterized by stable advanced exclusive by the Urban Displacement definitions. **The introduction of affordable units for low-income households in this exclusive Census Tract will further integrate the City of Belmont**. However, the addition of >1% of the City's total proposed units within this Census Tract is not likely to change existing demographics of the Tract substantially. These sites will provide access to the highest resource areas and would further integrate this RCAA.

Considerations. 14 site inventory units are proposed in Census Tract 6088, including 11 units for LMI households and 3 units for above moderate-income households, all of which are pipeline units.

Census Tract 6089

Characteristics. Census Tract 6089 is located between Ralston Avenue to the north, Alameda de las Pulgas to the east, and the City's border to the south and west. The western portion of this Census Tract is low density residential and open space. Conversely, the eastern portion of the Tract is primarily apartment complexes. San Mateo County Human Services, Fox Elementary, Ralston Middle School, Carlmont High School, and Belmont Public Library are also located within this Census Tract. Generally, the Census Tract is a highest resource area according to the TCAC's opportunity areas and contains the highest share of LMI households (39% of households in the Tract) compared to other Tracts in the City. More than half of the population in this Tract is non-White (52%) and 9% identify as Hispanic. Finally, the Tract is not an R/ECAP or RCAA and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations.

Assessment. There are no site inventory units proposed in this Census Tract. Neighborhoods in this area are established and provide opportunities for mixed-income households—characterized by stable moderate/mixed-income by the Urban Displacement definitions**.**

Considerations. There are no site inventory units in Census Tract 6089.

Census Tract 6090

Characteristics. Census Tract 6090 is located between Ralston Avenue to the north, CA-82 to the east, the City's border to the south, and Alameda de las Pulgas to the west. The area is predominantly low-density single-family with commercial uses along CA-82 to the east and apartments along Alameda de las Pulgas to the west. Charles Armstrong School, Twin Pines Park, Silverado Belmont Hills Memory Care, and McDougal Park are also located within this Census Tract. Generally, the Census Tract is a highest resource area according to the TCAC's opportunity areas and contains a moderate share of low- or moderate-income households (29% of households in the Tract). The majority of the population in this Tract are non-White (51%) and 15% identify as Hispanic. Finally, the Tract is not an R/ECAP

and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations. This Census Tract is an RCAA.

Assessment. The addition of 339 site inventory units including 216 for LMI households would help maintain the Tract as mixed-income and further integrate the City of Belmont. Neighborhoods in this area are established and provide opportunities for mixed-income households—characterized by stable moderate/mixed-income by the Urban Displacement definitions. **The introduction of affordable units for low-income households could help prevent the Tract from gentrification and displacement**. The addition of 19% of the City's proposed units within this Census Tract will help maintain the current income distribution of the Census Tract and continue to provide opportunities for mixed-income households to live in this RCAA and highest resource area.

Considerations. 339 site inventory units are proposed in Census Tract 6090, including 216 for LMI households and 123 units for above moderate-income households, 87 of which are pipeline units.

Census Tract 6091

Characteristics. Census Tract 6091 is only partially located in the City of Belmont, and the majority of the Tract is in San Carlos covering the downtown area. The area is almost entirely commercial uses between Highway 101 and CA-82. There are a handful of RHNA sites in this Tract near the single-family residential neighborhood between Ralston Avenue and O'Neil Avenue in Belmont. Generally, the Census Tract is a high resource area according to the TCAC's opportunity areas and contains a moderate share of low- or moderate-income households (34% of households in the Tract). The majority of the population in this Tract are non-White (54%) and one out of three identify as Hispanic. Finally, the Tract is not an R/ECAP and is rated lower displacement risk under the Urban Displacement, Estimated Displacement Risk designations. This Census Tract is an RCAA.

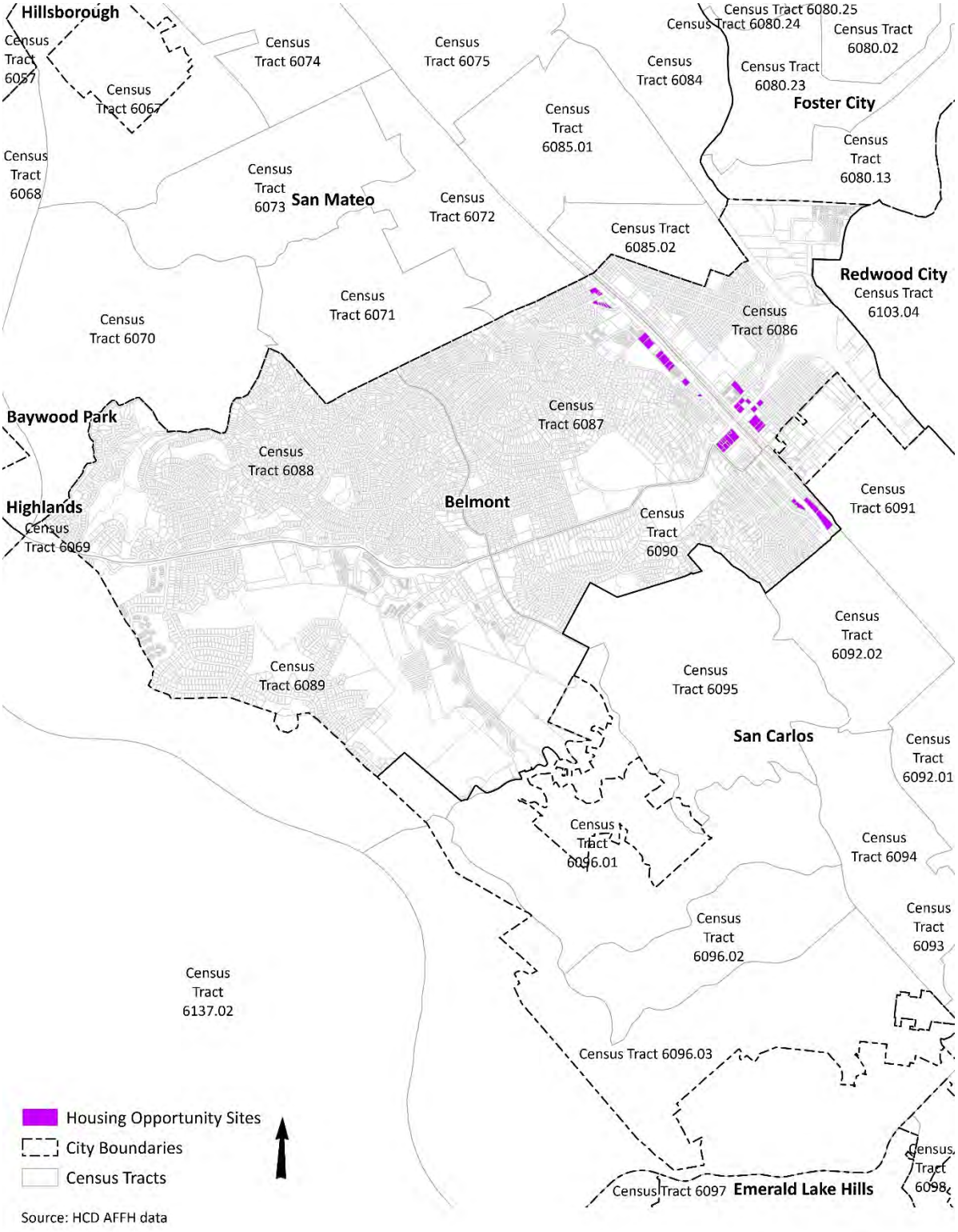
Assessment. The addition of 103 site inventory units, including 16 for LMI households, would help maintain the Tract as mixed-income and further integrate the City of Belmont. Neighborhoods in this area are established and provide opportunities for mixed-income households—characterized by stable moderate/mixed-income by the Urban Displacement definitions. **The introduction of affordable units for low-income households could help prevent the Tract from gentrification and displacement.**

Considerations. 103 site inventory units are proposed in Census Tract 6091, including 16 units for LMI households and 87 units for above moderate-income households, all of which are pipeline units.

TABLE C-1. BELMONT PROPOSED RHNA SITES BY CENSUS TRACT SUMMARY

Census Tract	AFFH Data							Sites Inventory Units				
	Pct. Hispanic	Pct. Non-White	Pct. Low/Mod Income	R/ECAP	RCAA	TCAC Opportunity Areas	Urban Displacement	Very Low	Low	Moderate	Above Moderate	Total
Census Tract 6086	20%	62%	37%	0	0	High Resource	Lower Displacement Risk	152	128	65	613	958
Census Tract 6087	12%	53%	31%	0	1	Highest Resource	Lower Displacement Risk	249	168	101	267	785
Census Tract 6088	8%	44%	14%	0	1	Highest Resource	Lower Displacement Risk	0	0	11	3	14
Census Tract 6089	9%	52%	39%	0	0	Highest Resource	Lower Displacement Risk	0	0	0	0	0
Census Tract 6090	15%	51%	29%	0	1	Highest Resource	Lower Displacement Risk	115	60	41	123	339
Census Tract 6091	31%	54%	34%	0	1	High Resource	Lower Displacement Risk	0	16	0	87	103

Figure C-2. Belmont Census Tract Map



Supportive Citywide Spatial Analysis

The following series of maps provide the location of proposed Belmont RHNA sites overlaid on demographic and fair housing data provided in HCD's AFFH data viewer.

Hispanic Population

Figure C-3 shows proposed RHNA sites overlaid with the percentage of the population that identifies as Hispanic for Census Block Groups in the City. Two block groups have higher than 20% of the population identified as Hispanic. There are only a small handful of proposed RHNA sites within the block group just north of Ralston Avenue within Census Tract 6087. Overall, the City of Belmont (12%) has a substantially smaller Hispanic population compared to San Mateo County as a whole (24%).

Non-White Population

Figure C-4 shows proposed RHNA sites overlaid with the share of the population that identifies as non-White by Census Tract in the City of Belmont. All Census Tracts within the City have between 44% and 62% of the population non-White. Census Tract 6086 located east of CA-82 has the highest share of non-White residents (62% of the population). Forty-seven percent (47%) of site inventory units are proposed in this Census Tract. This proportion of non-White residents is similar to San Mateo County as a whole (61%). The second highest share of non-White residents by Census Tract is in Tract 6091 (54%) which is the location of 5% of proposed site inventory units. Overall, Belmont has a lower share of non-White population when compared to San Mateo County with 56% of the population being non-Hispanic White in Belmont compared to 61% in the county.

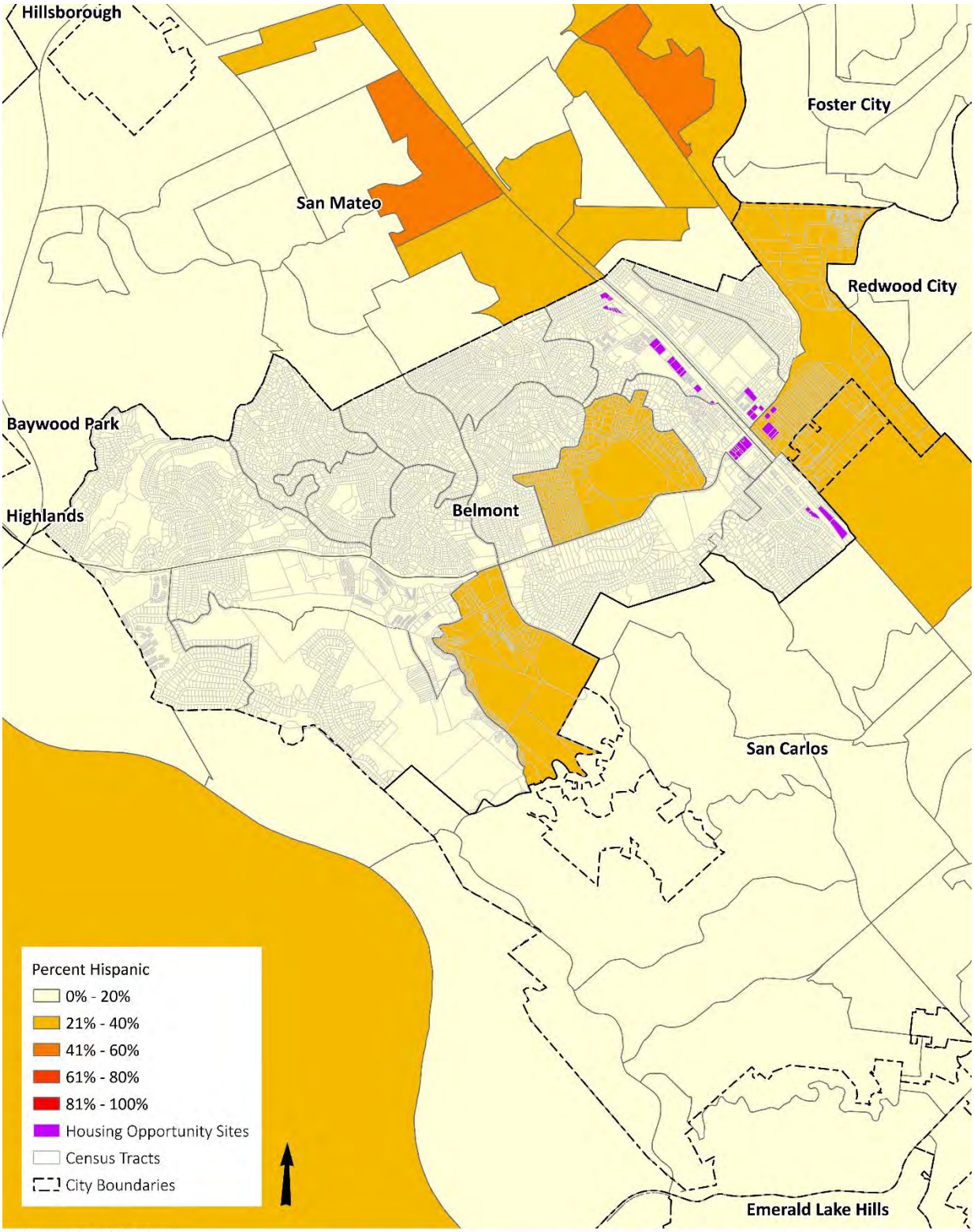
Low- and Moderate-Income

Figure C-5 shows proposed RHNA sites overlaid with the share of households that are low- and moderate-income in the City of Belmont by Census Tract. Census Tract 6089 has the highest proportion of LMI households (39%) but has no proposed LMI site inventory units. Census Tract 6086 has the second highest proportion of LMI households compared to other Census Tracts in the City with 37% LMI households. This proportion of LMI households is similar to the income distribution of San Mateo County as a while (40% LMI households).

Census Tract 6086 is the location of 44% of the proposed site inventory units and is predominantly commercial uses along CA-82 and Highway 101. There are several lower density single-family neighborhoods and large apartment communities within the Tract. St. Mark Catholic Church, Nesbit Elementary School, various hotels, and a Caltrain Station are also located within this Census Tract.

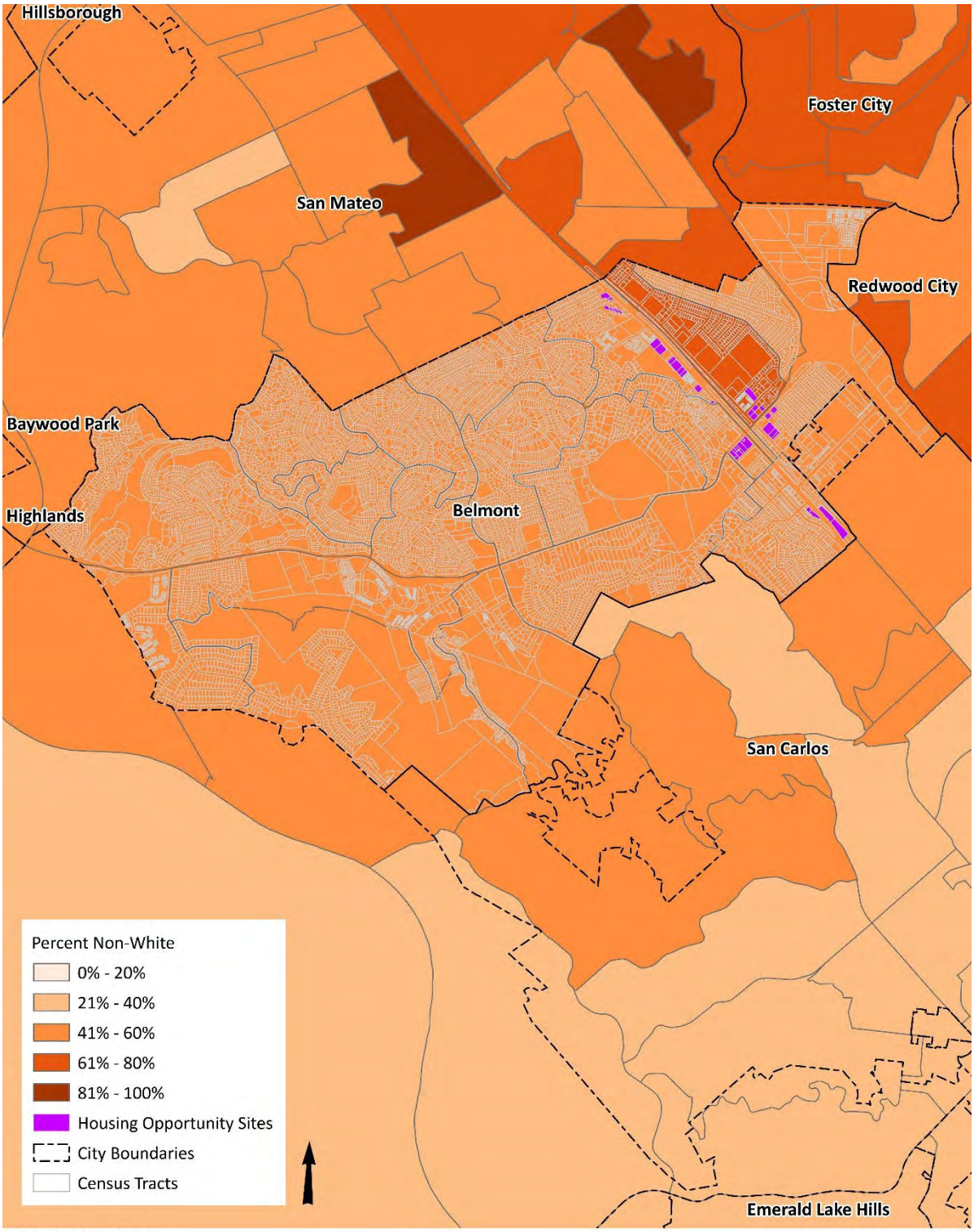
The lowest proportion of LMI households is within Census Tract 6088 (14%) which is the location of >1% of proposed site inventory units scattered throughout the residential neighborhoods.

Figure C-3. Belmont Proposed RHNA Sites, Percent Hispanic, 2019



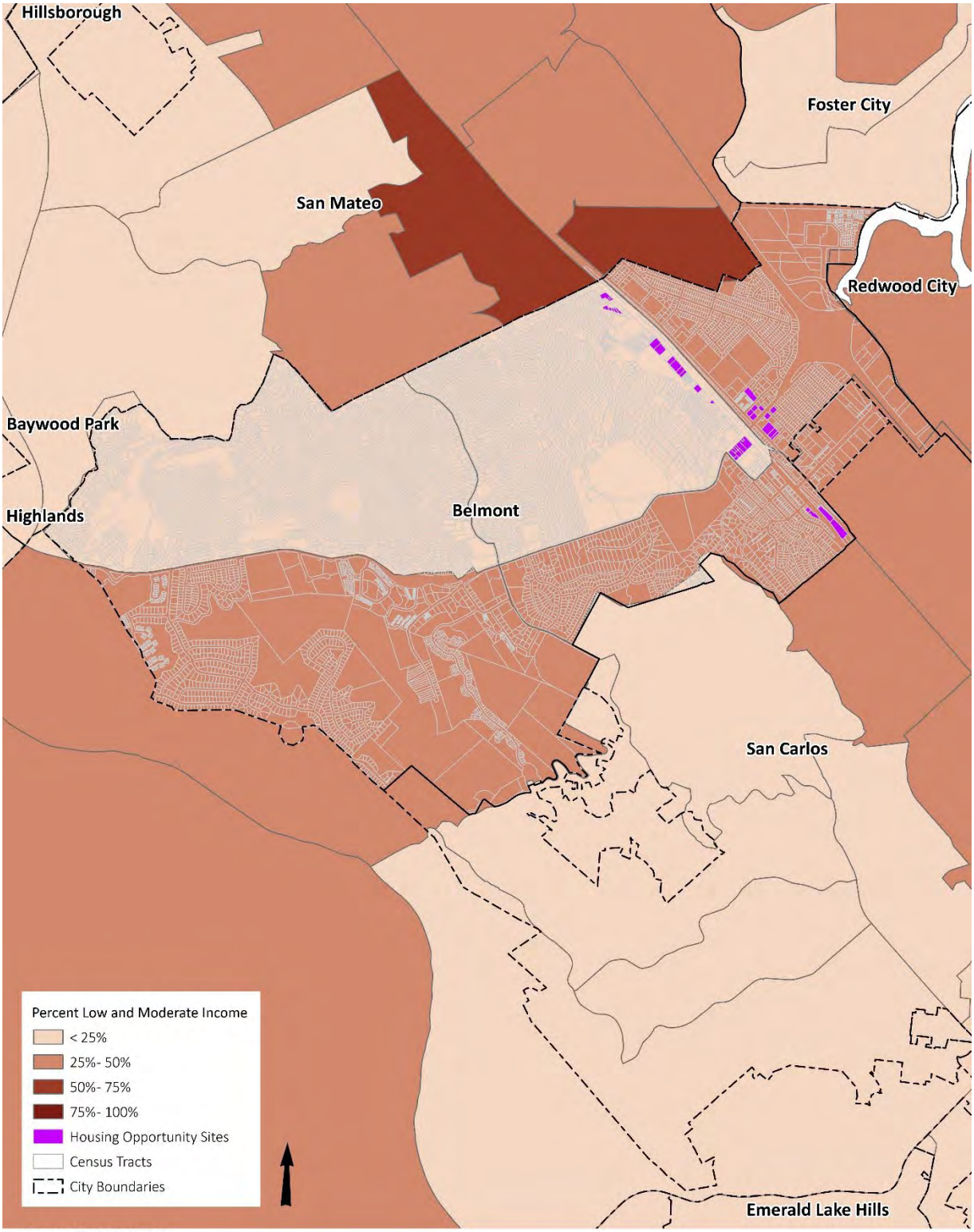
Source: HCD AFFH data

Figure C-4. Belmont Proposed RHNA Sites, Percent Non-White, 2019



Source: HCD AFFH data

Figure C-5. Belmont Proposed RHNA Sites, Percent Low- and Moderate-Income, 2019



Source: HCD AFFH data

Racially or Ethnically Concentrated Areas of Poverty (R/ECAP)

As shown in Figure C-6, there are no R/ECAPs in the City of Belmont.

Racially Concentrated Areas of Affluence (RCAA)

Figure C-7 shows RCAAs in Belmont. As shown in the figure, the majority of the City is an RCAA except for Census Tracts 6086 and 6089. **Nearly half (44%) of proposed site inventory units are located within RCAAs and further integrate the City of Belmont racially and economically.**

TCAC Areas of Opportunity

Figure C-8 shows the opportunity area designation for each Census Tract in the City based on TCAC's resource areas. The majority of the City of Belmont is a highest resource area except for Census Tracts 6086 and 6091. **All RHNA sites are located in areas that are designated as high or highest resource. Therefore, the proposed site locations will provide access to opportunity to LMI households living in the region.**

Urban Displacement

Figure C-9 shows the Urban Displacement typology assigned to each Census Tract in the City of Belmont. Most Census Tracts are considered stable moderate/mixed-income. These Census Tracts (6086, 6089, 6090, and 6091) contain 64% of proposed site inventory units. These areas are already mixed-income areas. **Therefore, the introduction of additional mixed-income units will help maintain the area's existing income diversity.**

Census Tract 6087 is classified as at-risk of becoming exclusive. Thirty-six percent (36%) of proposed site inventory units are located in this Census Tract and should help stabilize the area and prevent displacement. Finally, >1% of units in Tract 6088 which is classified as stable/advanced exclusive meaning that low- and moderate-income households have minimal access to live in these neighborhoods. The introduction of 14 units in these neighborhoods will further integrate the City.

Figure C-6. Belmont Proposed RHNA Sites, R/ECAPs, 2023

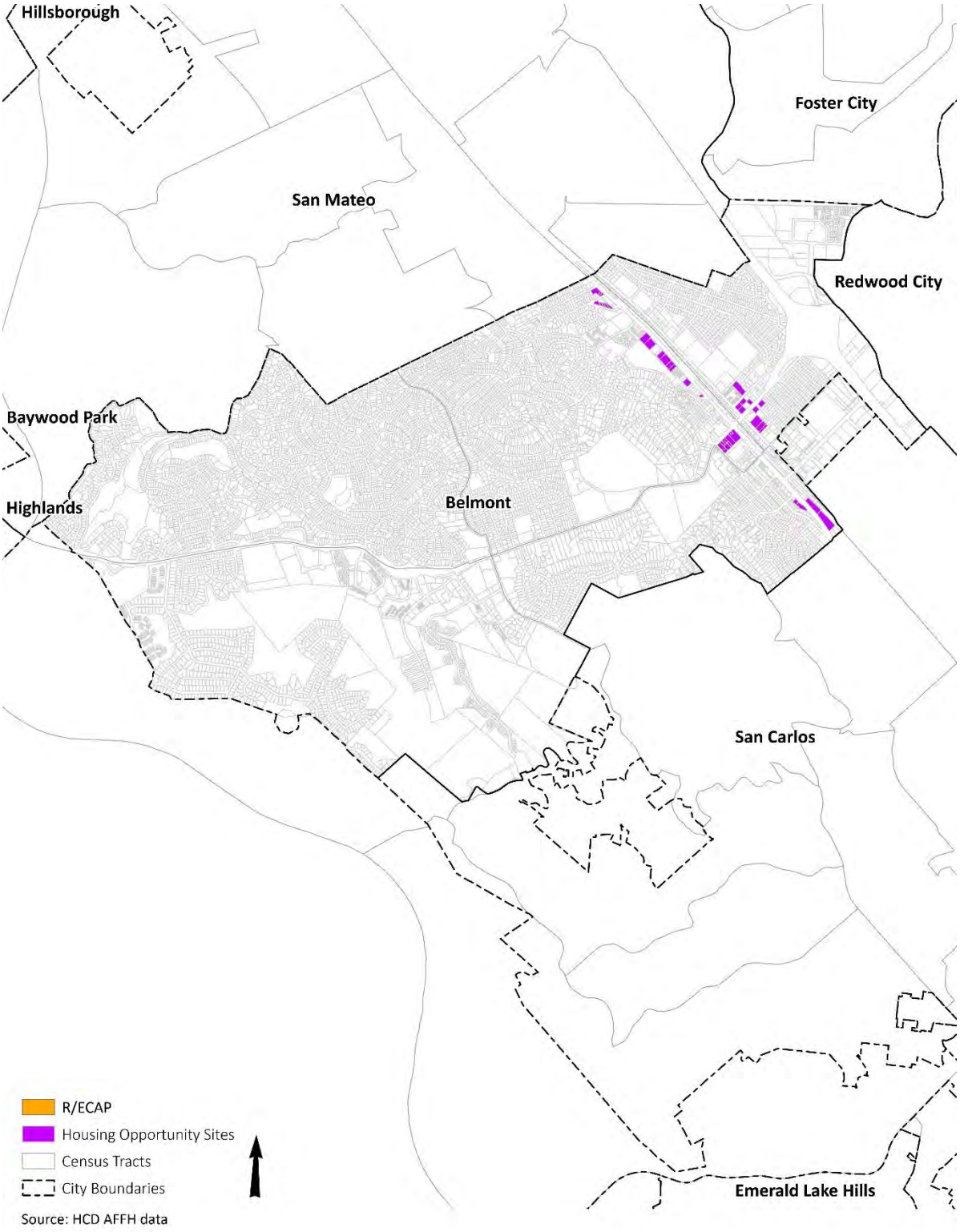
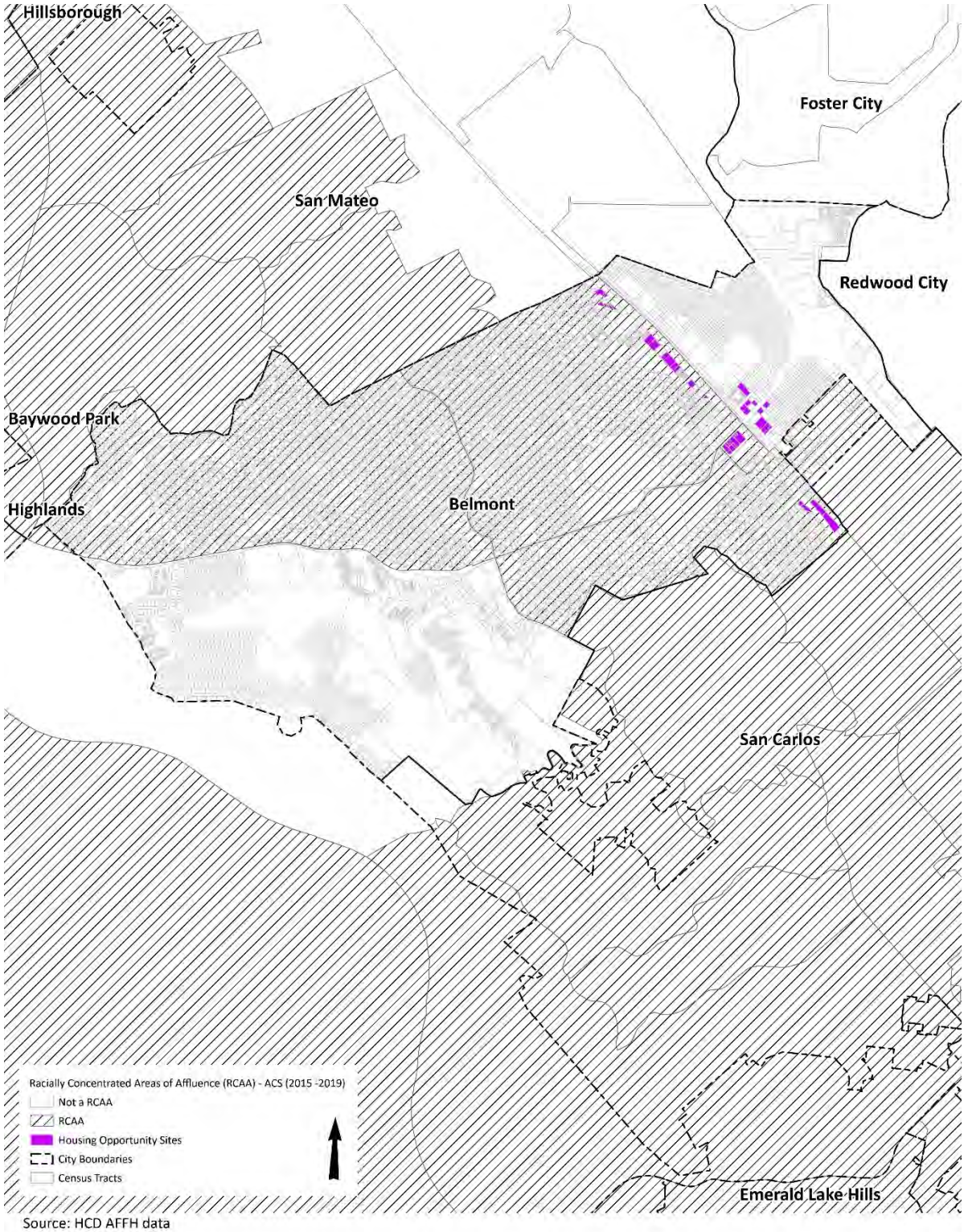
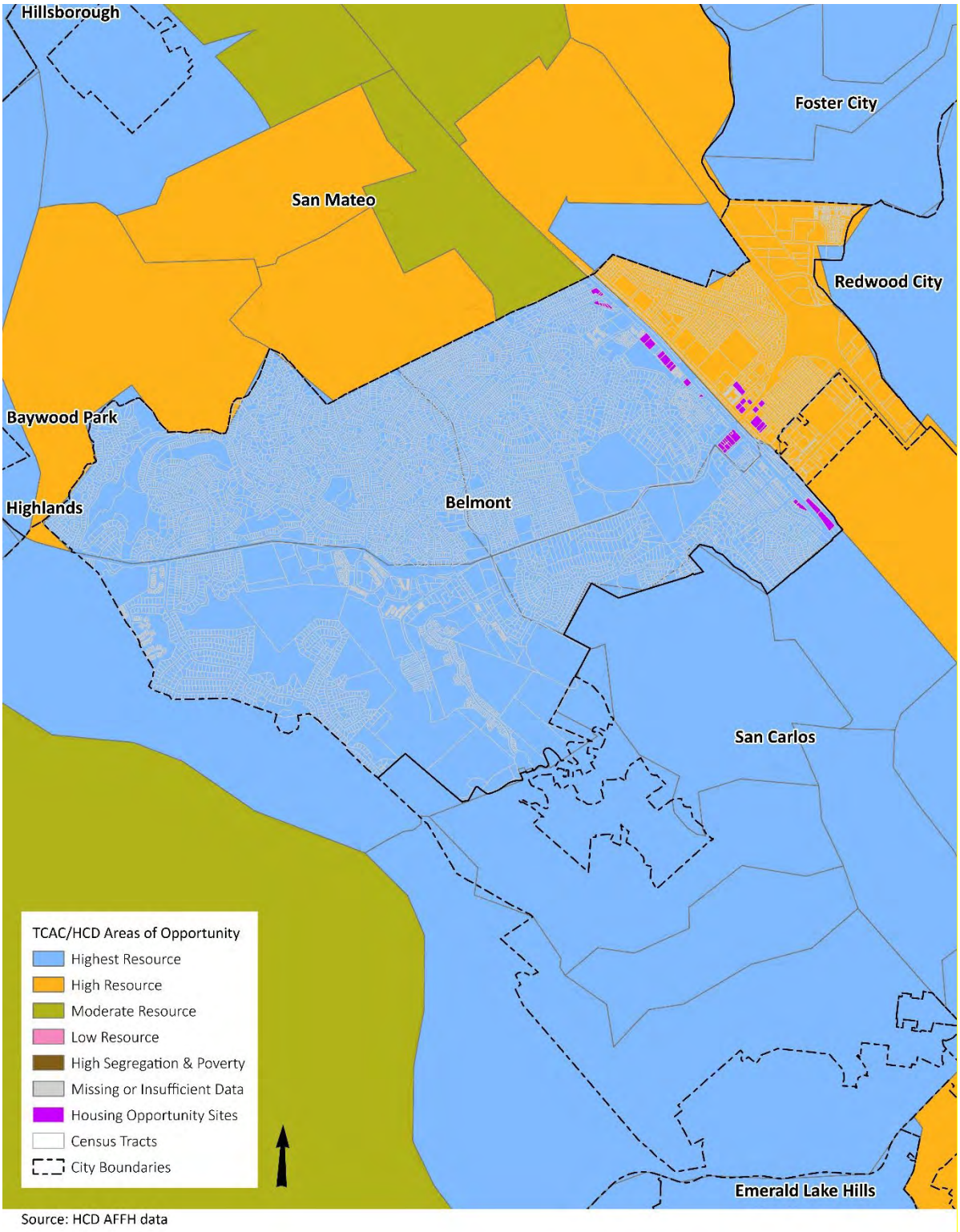


Figure C-7. Belmont Proposed RHNA Sites, RCAAs, 2019



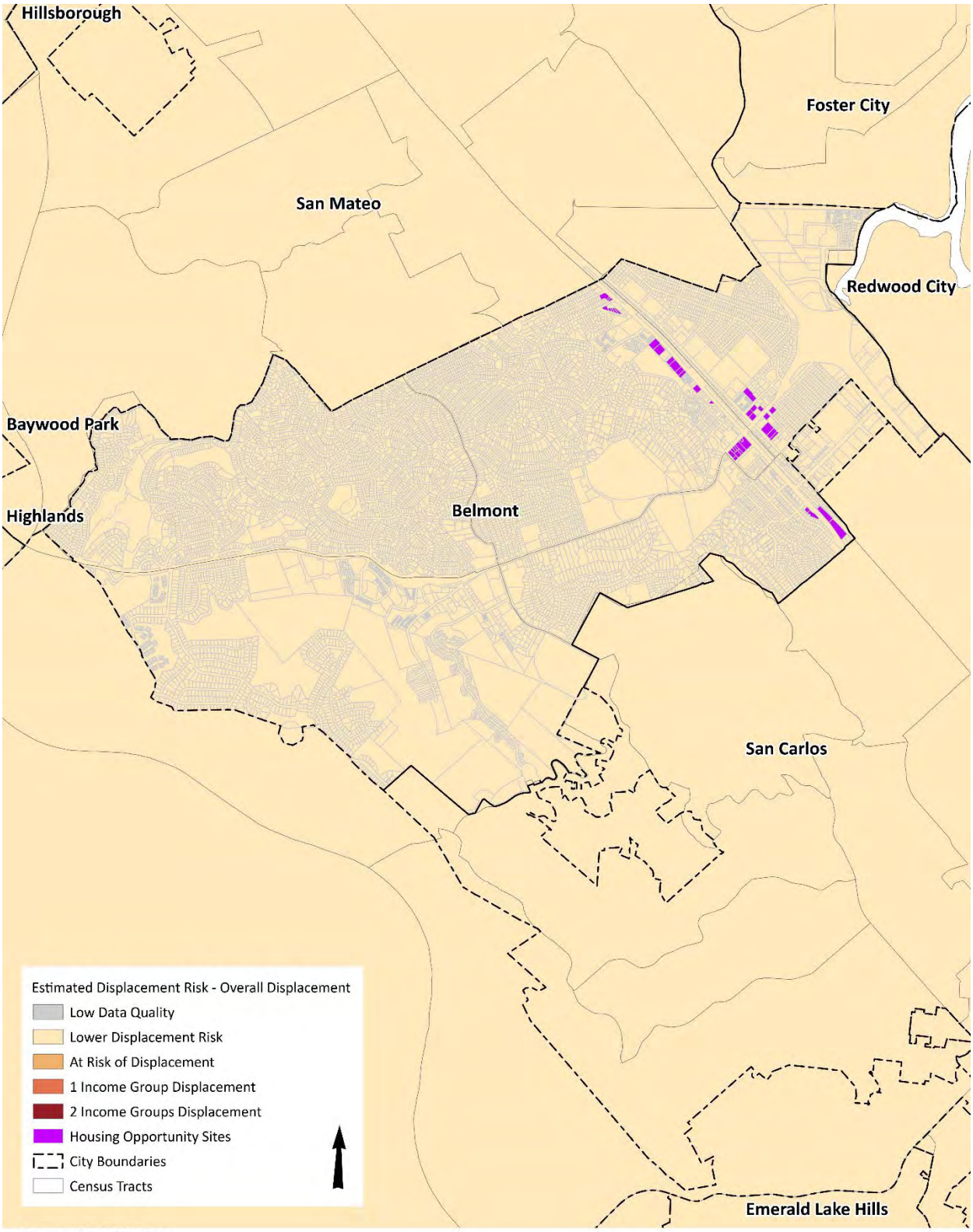
Source: HCD AFFH data

Figure C-8. Belmont Proposed RHNA Sites, TCAC Areas of Opportunity, 2023



Source: HCD AFFH data

Figure C-9. Belmont Proposed RHNA Sites, Urban Displacement, 2023



Source: HCD AFFH data

Segregation and Integration

Belmont has proportionately fewer residents of color than the county and the Bay Area overall, although the City's Asian population is on par with the proportion in the County and Bay Area. Fifty-four (54%) percent of Belmont residents are White, non-Hispanic versus 39% of the County and the Bay Area overall. Twelve percent (12%) of Belmont residents are Hispanic, compared to 24% in the County and the Bay Area overall.

The City's proposed distribution of site inventory units does not generally concentrate LMI units in areas with high non-White or Hispanic populations. However, the 345 LMI units proposed in Tract 6086 may contribute to concentrating non-White and LMI households in the downtown area east of CA-82 if non-White or Hispanic residents disproportionately occupy the new units. This area differs from more typically concentrated areas in that it does not have high rates of poverty and is not an R/ECAP. In fact, HCD indicators show this area as a high resource area and close to public transportation. **Additionally, providing units in this Census Tract for low- and moderate-income households would help stabilize households in the area and prevent further displacement of renter households.**

The share of non-White households in this Census Tract is on par with the Countywide distribution—62% and 61% respectively. Similarly, the proportion of LMI households in this Tract is 37% compared to 40% in San Mateo County. **Furthermore, the mapping completed by the state to support this study suggests that these moderately-concentrated neighborhoods offer similar access to jobs, good schools, and positive environmental outcomes as other parts of Belmont.**

A supplemental analysis of existing LMI households by Tract and proposed site inventory unit allocations shows that Tracts 6086 and 6091 would experience a slight decrease in LMI households as a proportion of total households by addition of the units; this is because the addition of the affordable units is balanced by the addition of market rate units. Conversely, Tracts 6087 and 6090 would experience an increase in the proportion of LMI households of six and seven percentage points, respectively. This increase in LMI households brings Tracts 6087 and 6090 to 37% and 36% LMI households, respectively. This proportion of LMI households is less than the countywide share of 40% in San Mateo County.

Racially and Ethnically Concentrated Areas of Poverty and Affluence

None of the proposed units are within an R/ECAP. Racially Concentrated Areas of Affluence (RCAAs) are defined by HUD as communities with a large proportion of affluent and non-Hispanic White residents. The majority of Belmont is within an RCAA. Forty-four percent (44%) of site inventory units are within an RCAA, which provide access to opportunity for residents of affordable housing and reduce existing segregation patterns. **These sites**

provide increased housing opportunities for all incomes and would not exacerbate concentrations of race and affluence.

Disparities in Access to Opportunity

The majority of the City of Belmont is a highest resource area except for Census Tracts 6086 and 6091. More than half (52%) of proposed site inventory units are in highest resources areas and 48% are in high resource areas**. Because Belmont is classified as a high resource area throughout and lacks major racial and ethnic concentrations, the distribution of residents among high resource areas matches the city's racial and ethnic distribution.** Additionally, all site inventory units will provide access to high resource areas for LMI households living in the region.

Disproportionate Housing Needs

Racial and ethnic minority populations in Belmont—with the exception of Asians—are more likely to be living in poverty and be housing cost burdened compared to the non-Hispanic White population. They are also slightly more likely to be denied a mortgage loan. Hispanic households have much higher rates of cost burden—48% are burdened and 25% severely burdened—and one in ten lives in an overcrowded household. **The locations of the proposed RHNA sites do not directly exacerbate the segregation of any of these racial or ethnic groups because the city has a lower proportion of non-White households compared to San Mateo County as a whole.**

SECTION VI. Contributing Factors and Fair Housing Action Plan

Note that the Fair Housing Action Plan is also included in *Chapter 3: Affirmatively Furthering Fair Housing Summary*, to ensure implementation and ongoing monitoring.

TABLE 3-1: FAIR HOUSING ACTION PLAN

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
Lack of fair housing complaints filed.	Lack of access to information about fair housing rights. Limited knowledge of fair housing by residents.	High	▪ H5.1: Update Website to Improve Access to Fair Housing Information and Housing Services.	▪ Complete best practices review by Q1 2025. ▪ Complete website update by Q2 2025, update quarterly thereafter.
Very high rates of cost burden for <50% AMI households and Black and Hispanic households; high rates of overcrowding among Asian households.	Lack of affordable housing citywide; low housing production.	High	▪ H5.2: Coordinate with other jurisdictions and agencies in the County to advance AFFH goals	▪ Attend regular meetings with 21 Elements, 21 Directors and Housing Managers group. ▪ Collaborate with peer jurisdictions to implement Housing Element Programs that would benefit from efficiencies of scale.
			▪ H5.3: Modify the Inclusionary Housing Program.	▪ Complete feasibility analysis by Q4 2025; Implement redesigned program by Q1 2026.
			▪ H5.4: Work with Housing Developers to Affirmatively Market Housing to Households with Disproportionate Housing Needs.	▪ Establish list of service providers by Q4 2024 and update annually thereafter. ▪ Ongoing as projects are processed, review developer marketing plans to ensure affirmative marketing is included.
			▪ H5.6: Expand Tenant Protections	▪ In Q4 2025, draft extended tenant protections provisions and research policy provisions for substantial remodel exemptions and right of return policies. ▪ Bring recommended language to City Council in Q1 2026. Conduct proactive outreach to tenants and tenant groups bi-annually.
			▪ H5.7: Continue Financial Support of Existing Home Sharing Program.	▪ City will grant funding as part of annual budget process. ▪ Meet with HIP Housing within one year of Housing Element Certification and annually thereafter.

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
			▪ H5.8: Facilitate Development of Housing on Institutional Properties.	▪ Reach out to each religious institution site owner or operator within one year following Housing Element certification and annually thereafter. ▪ Provide mailed notifications to religious institutions within six months of the adoption of any new State legislation that reduces barriers to development of religious institution sites. ▪ Reach out to each private school site owner or operator within one year following Housing Element certification and annually thereafter.
			▪ H5.9: Amend Zoning Code to Facilitate Production of ADUs and SB9 units.	▪ Complete zoning ordinance amendments and establish policies and procedures to facilitate these types of projects within one year following Housing Element Certification.
			▪ H5.10: Provide Financial Support for ADUs that Serve Lower-Income Households.	▪ Participate in Countywide process in 2024. ▪ Establish a grant or loan program by Q4 2025.
			▪ H5.11: Conduct Outreach to Encourage ADU and SB9 Unit Production.	▪ Conduct analysis and outreach related to units on sloped sites in Q2 2025. ▪ Join ADU Resource Center and launch online plans gallery in Q3 2024. ▪ Create new outreach materials in Q1 2025. ▪ Conduct outreach to all ADU/JADU/SB9 owners within 9 months of Housing Element Certification and annually thereafter.
			▪ H5.12: Create an AFFH Monitoring Program.	▪ Create a list and map of existing ADUs, JADUs and SB9 units within six months of Housing Element adoption. ▪ Participate in regional process to establish an ADU monitoring program on timing they set forward. ▪ If ADU production does not meet target, consider additional efforts such as reducing process and permitting fees to incentivize production in 2027.

Fair Housing Issue	Contributing Factors	Priority Level	Meaningful Program Actions (from *Chapter 7, Goals, Policies, and Programs*)	Targets and Timeline
Persons with disabilities and persons of color are most likely to file fair housing complaints with HUD.	Lack of accessible affordable units; housing discrimination.	Medium	▪ H5.5: Provide Fair Housing Training for Landlords and Tenants.	▪ Ongoing annual check in with Project Sentinel. ▪ Provide training in 2025 and every two years thereafter.

Source: City of Belmont, 2024.

AFFH Attachment C.2.
Community Engagement Resident Survey

This section reports the findings from the resident survey conducted of San Mateo County residents to support the AFFH analysis of Housing Elements. It explores residents' housing, affordability, and neighborhood challenges and experiences with displacement and housing discrimination. The survey also asks about residents' access to economic opportunity, captured through residents' reported challenges with transportation, employment, and K-12 education. The survey was offered in both English and Spanish.

The resident survey was available online, in both Spanish and English, in a format accessible to screen readers, and promoted through jurisdictional communications and social media and through partner networks. A total of 2,382 residents participated.

The survey instrument included questions about residents' current housing situation, housing, neighborhood and affordability challenges, healthy neighborhood indicators, access to opportunity, and experience with displacement and housing discrimination.

Explanation of terms. Throughout this section, several terms are used that require explanation.

- "Precariously housed" includes residents who are currently homeless or living in transitional or temporary/emergency housing, as well as residents who live with friends or family but are not themselves on the lease or property title. These residents may (or may not) make financial contributions to pay housing costs or contribute to the household in exchange for housing (e.g., childcare, healthcare services).
- "Disability" indicates that the respondent or a member of the respondent's household has a disability of some type—physical, mental, intellectual, developmental.
- "Single parent" are respondents living with their children only or with their children and other adults but not a spouse/partner.
- "Tenure" in the housing industry means rentership or ownership.
- "Large households" are considered those with five or more persons residing in a respective household.
- "Seriously Looked for Housing" includes touring or searching for homes or apartments, putting in applications or pursuing mortgage financing.

Sampling note. The survey respondents do not represent a random sample of the county or jurisdictions' population. A true random sample is a sample in which each individual in the population has an equal chance of being selected for the survey. The self-selected nature of the survey prevents the collection of a true random sample. Important insights and themes can still be gained from the survey results, however, with an understanding of the differences among resident groups and between jurisdictions and the county overall. Overall, the data provide a rich source of information about the county's households and their experience with housing choice and access to opportunity in the communities where they live.

Jurisdiction-level data are reported for cities with 50 responses or more. Response by jurisdiction and demographics are shown in the figure below. Overall, the survey received a very strong response from typically underrepresented residents including: people of color, renters, precariously housed residents, very low income households, households with children, large households, single parents, and residents with disabilities.

Figure 1.
Resident Survey Sample Sizes by Jurisdictions and Selected Characteristics

	County	Belmont	Brisbane	Burlingame	Daly City	East Palo Alto	Foster City	Half Moon Bay	Hillsborough	Milbrae	Pacifica	Redwood City	San Bruno	San Mateo	South San Francisco
Total Responses	**2,382**	**89**	**82**	**173**	**130**	**53**	**148**	**63**	**59**	**55**	**84**	**163**	**99**	**175**	**832**
Race/Ethnicity															
African American	134	5	7	4	9	8	10	6	4	4	5	14	4	17	15
Hispanic	397	7	9	14	26	27	13	8	1	8	12	59	13	31	149
Asian	500	18	9	26	43	6	32	6	8	13	14	11	19	23	249
Other Race	149	7	10	6	8	3	14	3	3	3	3	9	7	13	47
Non-Hispanic White	757	41	35	89	27	4	44	27	27	15	35	54	36	58	195
Tenure															
Homeowner	1,088	39	51	96	39	9	89	26	46	18	42	37	48	58	409
Renter	1,029	40	30	65	67	36	43	28	7	33	38	105	41	88	324
Precariously Housed	309	10	8	12	26	12	17	14	5	7	13	23	16	29	87
Income															
Less than $25,000	282	14	11	12	21	15	12	11	5	6	7	40	11	29	61
$25,000-$49,999	265	13	9	10	22	9	8	6	3	6	7	28	5	20	97
$50,000-$99,999	517	10	14	38	43	10	26	11	3	10	17	37	22	40	206
Above $100,000	721	38	24	69	16	8	64	12	30	14	32	31	40	40	251
Household Characteristics															
Children under 18	840	38	24	53	50	26	44	17	18	20	29	61	37	64	287
Large households	284	5	7	11	20	18	8	3	5	7	8	20	13	15	133
Single Parent	240	14	8	15	19	11	12	9	3	7	7	30	9	21	49
Disability	711	28	25	41	38	22	40	22	13	17	29	62	34	65	210
Older Adults (age 65+)	736	25	27	66	37	11	54	25	25	18	33	44	32	37	248

Note: Numbers do not aggregate either due to multiple responses or that respondents chose not to provide a response to all demographic and socioeconomic questions.

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Primary Findings

The survey data present a unique picture of the housing choices, challenges, needs, and access to economic opportunity of San Mateo County residents.

Top level findings from residents' perspectives and experiences:

- The **limited supply of housing** that accommodates voucher holders presents several challenges. Specifically,
    - Eight out of 10 voucher holders represented by the survey find a landlord that accepts a housing voucher to be "difficult" or "very difficult."
    - According to the survey data, vouchers not being enough to cover the places residents want to live is a top impediment for residents who want to move in San Mateo County, as well as for African American, Asian, and Hispanic residents, households with children under 18, single parents, older adults, households with a member experiencing a disability, and several jurisdictions.
- **Low income is a barrier** to accessing housing. The impacts are highest for precariously housed respondents. large households, Hispanic households, and residents in Daly City and Redwood City.
- **Nearly 4 in 10 respondents who looked for housing experienced denial of housing.** African American/Black respondents, single parent households, precariously housed respondents, and households with income below $50,000 reported the highest denial rates.
- **1 in 5 residents have been displaced** from their home in the past five years. One of the main reasons cited for displacement was *the rent increased more than I could pay*. African American households, single parents, households that make less than $25,000, and precariously housed respondents reported the highest rates of displacement.
- For households with children that were displaced in the past five years, **60% of children in those households have changed schools.** The most common outcomes identified by households with children who have changed schools include *school is more challenging, they feel less safe at the new school,* and *they are in a worse school.*
- **Nearly 1 in 5 residents reported they have experienced discrimination** in the past five years. African American, single parent, and precariously housed respondents reported the highest rates of discrimination. The most common actions

in response to discrimination cited by survey respondents were *Nothing/I wasn't sure what to do* and *Moved/found another place to live*.

- Of respondents reporting a disability, **about 25% report that their current housing situation does not meet their accessibility needs**. The three top greatest housing needs identified by respondents included installation of grab bars in bathroom or bench in shower, supportive services to help maintain housing, and ramps.

- On average, respondents are **fairly satisfied with their transportation situation**. Groups with the highest proportion of respondents somewhat or not at all satisfied with their transportation options included African American, single parents, precariously housed, and Brisbane respondents.

There are some housing, affordability, and neighborhood challenges unique to specific resident groups. These include:

- **Would like to move but can't afford it**—Most likely to be a challenge for Daly City, East Palo Alto, and Redwood City respondents, as well as Hispanic, renter, precariously housed, households making less than $50,000, and large household respondents.

- **My house or apartment isn't big enough for my family**—Most likely to be a challenge for East Palo Alto respondents, as well as Hispanic households, large and single parent households, and households with children under 18.

- **I'm often late on my rent payments**—Most likely to be a challenge for East Palo Alto and renter respondents, as well as households that make less than $25,000.

- **I can't keep up with my utility payments**—Most likely to be a challenge for East Palo Alto, Daly City, and San Mateo respondents, as well as African American and Hispanic respondents, single parent households, households with children under 18, and households that make less than $50,000.

- **Bus/rail does not go where I need to go or does not operate during the times I need**— Most likely to be a challenge for African American, precariously housed, single parent households, Brisbane and Pacifica respondents.

- **Schools in my neighborhood are poor quality**—Most likely to be a challenge for East Palo Alto, Redwood City, San Bruno and South San Francisco respondents, as well as Hispanic respondents and households with children under 18.

Resident Survey Findings

Of survey respondents who reported their race or ethnicity, nearly 40% of survey respondents identified as non-Hispanic White, followed by Asian (26%), Hispanic (20%), African American (7%), and Other Minority (8%) residents (Figure 2). Overall, 45% of the survey respondents were homeowners, followed by 42% of renter respondents. Thirteen percent of respondents reported they are precariously housed (Figure 3). Four in ten respondents reported having household income greater than $100,000. Nearly 30% of respondents reported a household income between $50,000-99,999, followed by 15% of respondents who made between $25,000-49,999 and 16% of respondents making less than $25,000 (Figure 4).

The survey analysis also included selected demographic characteristics of respondents, including those with children under the age of 18 residing in their household, adults over the age of 65, respondents whose household includes a member experiencing a disability, those who live in large households, and single parents. Thirty five percent of respondents indicated they had children in their household, while 31% indicated they were older adults. Thirty percent of respondents indicated they or a member of their household experienced a disability, 12% of respondents reported having large households, and 10% were single parents (Figure 5).

Figure 2. Survey Respondents by Race/Ethnicity

Note:

n=1,937; 535 respondents did not indicate their race or ethnicity.

Source:

Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

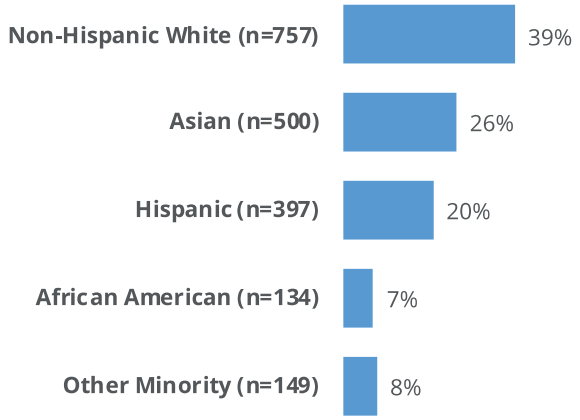


Figure 3. Survey Respondents by Tenure

Note:

n=2,426.

Source:

Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

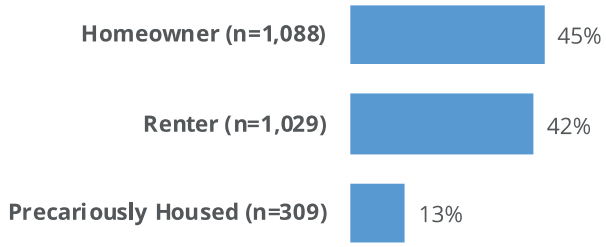


Figure 4. Survey Respondents by Income

Note:

n=1,785.

Source:

Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

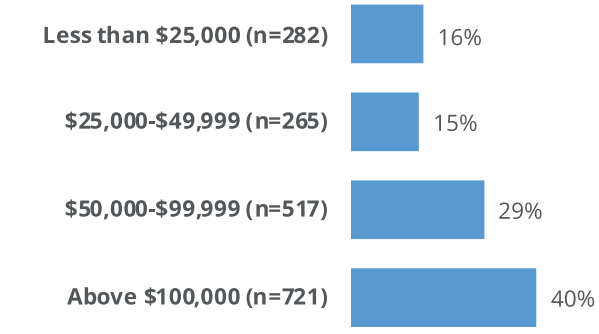
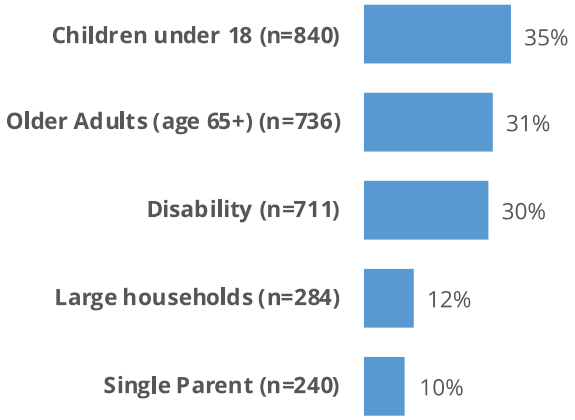


Figure 5. Survey Respondents by Selected Household Characteristics

Note:
Denominator is total responses to the survey (n=2,382)
Source:
Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.



Housing, Neighborhood and Affordability Challenges

Housing challenges: overall. Survey respondents were asked to select the housing challenges they currently experience from a list of 34 different housing, neighborhood, and affordability challenges. Figures 6a through 8c present the top 10 housing and neighborhood challenges and top 5 affordability challenges experienced by jurisdiction, race/ethnicity, tenure, income, and selected household characteristics.

These responses allow a way to compare the jurisdictions to the county for housing challenges for which other types of data do not exist. In this analysis, "above the county"—**shaded in light red or pink**—is defined as the proportion of responses that is 25% higher than the overall county proportion. "Below the county"—**shown in light blue**—occurs when the proportion of responses is 25% lower than the overall county proportion.

As shown in Figure 6a, residents in Redwood City and East Palo Alto experience several housing challenges at a higher rate than the county overall. Conversely, Foster City and Hillsborough residents experience nearly all identified housing challenges at a lower rate than the county.

Notable trends in housing, neighborhood, and affordability challenges by geographic area include:

- Residents in Daly City, East Palo Alto, and Redwood City are less likely to move due to the lack of available affordable housing options.
- East Palo Alto, Redwood City, and San Mateo residents report living in housing that is too small for their families.
- Millbrae, Belmont, and Redwood City residents report being more reticent to request a repair to their unit in fear that their landlord will raise their rent or evict them.
- Nearly 1 in 5 Pacifica survey respondents report that their home or apartment is in bad condition.

- Brisbane and East Palo Alto residents are more likely to experience a landlord refusing to make repairs to their unit.
- Residents in Daly City and Millbrae are more likely to report that they don't feel safe in their neighborhood or building.
- Half Moon Bay and East Palo Alto respondents expressed the greatest need for assistance in taking care of themselves or their home.

When compared to the county overall, **the most common areas where respondents' needs were higher than the county overall** were:

- Overall, half of the jurisdictions' respondents reported *I need help taking care of myself/my home and can't find or afford to hire someone* at a higher rate than the county.
- Over 40% of jurisdictions' respondents reported a higher rate than the county for the following housing challenge: *My home/apartment is in bad condition.*
- Nearly 40% of jurisdictions' respondents reported a higher rate than the county for the following housing challenges: *My landlord refuses to make repairs despite my requests* and *I don't feel safe in my neighborhood/building.*

Figure 6a.
Top 10 Housing Challenges Experienced by Jurisdiction

25% Above County average

25% Below County average

Housing or Neighborhood Condition	County	Belmont	Brisbane	Burlingame	Daly City	East Palo Alto	Foster City	Half Moon Bay	Hillsborough	Milbrae	Pacifica	Redwood City	San Bruno	San Mateo	South San Francisco
Valid cases	2,159	82	73	158	118	49	135	59	50	53	79	151	93	163	738
I would like to move but I can't afford anything that is available/income too low	31%	27%	12%	20%	51%	41%	16%	25%	4%	32%	28%	43%	30%	38%	35%
My house or apartment isn't big enough for my family	20%	22%	11%	14%	24%	35%	10%	12%	4%	21%	11%	26%	20%	26%	21%
I worry that if I request a repair it will result in a rent increase or eviction	14%	21%	10%	13%	17%	14%	9%	10%	2%	23%	15%	20%	11%	15%	13%
My home/apartment is in bad condition	11%	15%	14%	9%	15%	12%	3%	7%	0%	11%	18%	14%	5%	15%	10%
My landlord refuses to make repairs despite my requests	6%	6%	14%	3%	5%	12%	4%	5%	2%	2%	9%	9%	5%	10%	5%
I live too far from family/ friends/my community	6%	6%	5%	4%	8%	4%	5%	8%	6%	6%	3%	8%	4%	7%	5%
I don't feel safe in my building/ neighborhood	6%	7%	5%	5%	13%	8%	0%	7%	6%	11%	10%	8%	3%	6%	3%
I need help taking care of myself/my home and can't find or afford to hire someone	5%	2%	7%	7%	7%	10%	2%	14%	2%	8%	9%	3%	4%	8%	4%
I have bed bugs/insects or rodent infestation	5%	10%	5%	4%	3%	16%	2%	3%	4%	6%	9%	11%	6%	4%	3%
The HOA in my neighborhood won't let me make changes to my house or property	4%	2%	5%	1%	3%	8%	11%	3%	2%	4%	5%	3%	3%	4%	2%
None of the above	42%	37%	48%	50%	20%	33%	55%	44%	76%	36%	47%	28%	45%	35%	46%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

The following two figures segment the answers by:

- Housing affordability challenges only; and
- Neighborhood challenges only.

Housing affordability challenges. As shown in Figure 6b, residents in San Mateo, Daly City, East Palo Alto, and Pacifica experience affordability challenges at a higher rate than the county overall. Conversely, Belmont, Hillsborough, Burlingame, and South San Francisco residents experience affordability challenges at a lower rate than the county.

The most significant geographic variations occur in:

- San Mateo city residents experience all five affordability challenges at a greater rate than the county overall. In addition to being less likely to pay utility bills or rent on time, San Mateo residents are more than twice as likely than the average county respondent to have bad credit or a history of eviction/foreclosure that impacts their ability to rent.
- East Palo Alto, San Mateo, and Daly City residents are most likely to experience difficulty paying utility bills.
- Residents in East Palo Alto and Redwood City are most likely to be late on their rent payments.
- Millbrae residents experience the greatest difficultly paying their property taxes among jurisdictions in San Mateo County.
- Respondents from Brisbane, Half Moon Bay, and Pacifica are also more likely to have trouble keeping up with property taxes.
- Daly City, City of San Mateo, and Redwood City respondents are more likely to have bad credit or an eviction history impacting their ability to rent.

Overall, over a third of jurisdictions' respondents experienced the following affordability challenges at a higher rate than the county: *I can't keep up with my property taxes* and *I have bad credit/history of evictions/foreclosure and cannot find a place to rent*.

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Figure 6b.
Top 5 Affordability Challenges Experienced by Jurisdiction

25% Above County average

25% Below County average

Affordability Challenges	County	Belmont	Brisbane	Burlingame	Daly City	East Palo Alto	Foster City	Half Moon Bay	Hillsborough	Milbrae	Pacifica	Redwood City	San Bruno	San Mateo	South San Francisco
Valid cases	2,130	83	73	157	115	51	134	58	50	50	77	147	93	160	728
I can't keep up with my utilities	10%	6%	5%	6%	15%	16%	5%	12%	4%	12%	8%	12%	9%	15%	9%
I'm often late on my rent payments	8%	6%	5%	6%	10%	20%	3%	7%	2%	8%	4%	12%	4%	11%	7%
I can't keep up with my property taxes	6%	2%	10%	4%	3%	2%	8%	10%	0%	16%	10%	3%	5%	9%	5%
I have bad credit/history of evictions/foreclosure and cannot find a place to rent	4%	1%	4%	2%	13%	6%	0%	0%	2%	0%	5%	8%	4%	10%	2%
I have Section 8 and I am worried my landlord will raise my rent higher than my voucher payment	4%	2%	7%	3%	3%	2%	7%	3%	4%	4%	5%	3%	3%	6%	2%
None of the above	73%	73%	68%	80%	65%	59%	78%	66%	88%	64%	71%	70%	77%	63%	80%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Neighborhood challenges. As shown in Figure 6c, residents in East Palo Alto, Brisbane, Daly City, and Pacifica experience neighborhood challenges at a higher rate than the county. Burlingame and Foster City both experience neighborhood challenges at a lower rate than the county.

Hillsborough and Belmont residents report divergent experiences related to neighborhood challenges — respondents identified more challenges around neighborhood infrastructure and access to transit but fewer challenges around school quality and job opportunities.

There are a handful of jurisdictions who experience specific neighborhood challenges at a disproportionate rate compared to the county.

- For instance, East Palo Alto and Belmont residents experience neighborhood infrastructure issues (e.g., bad sidewalks, no lighting) more acutely than county residents overall.
- Brisbane residents experience transportation challenges in their neighborhoods.
- East Palo Alto, Redwood City, San Bruno, and South San Francisco experience challenges with school quality in their neighborhoods.
- Residents in Brisbane, Hillsborough, Pacifica, Belmont, and Half Moon Bay report the highest rates of difficulty accessing public transit.
- Daly City, Millbrae, San Mateo, and East Palo Alto residents were more likely to identify the lack of job opportunities available in their neighborhoods.

Over a third of jurisdictions' respondents experienced the following neighborhood challenges at a higher rate than the county: *I can't get to public transit/bus/light rail easily or safely.*

Figure 6c.
Top 5 Neighborhood Challenges Experienced by Jurisdiction

25% Above County average

25% Below County average

Neighborhood Challenges	County	Belmont	Brisbane	Burlingame	Daly City	East Palo Alto	Foster City	Half Moon Bay	Hillsborough	Milbrae	Pacifica	Redwood City	San Bruno	San Mateo	South San Francisco
Valid cases	2,079	80	72	153	116	48	130	56	53	46	75	145	91	151	712
My neighborhood does not have good sidewalks, walking areas, and/or lighting	17%	31%	18%	13%	25%	40%	4%	18%	23%	20%	15%	21%	14%	12%	16%
Schools in my neighborhood are poor quality	15%	6%	18%	3%	17%	25%	4%	14%	2%	7%	13%	20%	20%	15%	20%
Bus/rail does not go where I need to go or does not operate during the times I need	15%	14%	24%	8%	14%	15%	21%	18%	9%	15%	24%	17%	14%	17%	10%
I can't get to public transit/bus/light rail easily or safely	14%	19%	29%	7%	9%	10%	14%	18%	25%	17%	21%	12%	13%	15%	10%
There are not enough job opportunities in the area	12%	9%	8%	7%	20%	17%	8%	14%	0%	20%	13%	11%	11%	18%	12%
None of the above	50%	41%	28%	69%	45%	33%	62%	46%	57%	50%	52%	41%	52%	52%	55%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Differences in needs by race and ethnicity and housing tenure. As shown in Figure 7a, and compared to the county overall:

- African American, Hispanic, and Other Race respondents, as well as Renters and those who are precariously housed experience several housing challenges at a higher rate than the county overall.
- Conversely, non-Hispanic White residents and homeowners are less likely to experience housing challenges.

Specifically,

- Black or African American residents are more than three times as likely to have a landlord not make a repair to their unit after a request compared to county residents overall. Renters, Hispanic, Other Race, and Precariously housed residents are also more likely to experience this challenge.
- African American, Asian, Hispanic, Renter, and Precariously Housed households are more likely to experience bed bugs or rodent infestation in their homes.
- African American, Other Race, Renter, and Precariously Housed households are also more likely to live further away from family, friends, and their community.
- African Americans are three times more likely than the average county respondent to be told by their HOA they cannot make changes to their house or property. Asian households are twice as likely to experience this challenge.
- Renter, Hispanic, and Other Race respondents are more likely to worry that if they request a repair it will result in a rent increase or eviction and to report that their homes are in bad condition.

Figure 7a.
Top 10 Housing Challenges Experienced by Race/Ethnicity and Tenure

25% Above County average

25% Below County average

Housing or Neighborhood Condition	County	African American	Asian	Hispanic	Other Race	Non-Hispanic White	Homeowner	Renter	Precariously Housed
Valid cases	2,159	132	489	392	144	734	986	974	301
I would like to move but I can't afford anything that is available/income too low	31%	30%	32%	50%	31%	20%	7%	48%	56%
My house or apartment isn't big enough for my family	20%	16%	21%	35%	22%	11%	12%	29%	18%
I worry that if I request a repair it will result in a rent increase or eviction	14%	17%	13%	23%	19%	11%	2%	28%	13%
My home/apartment is in bad condition	11%	12%	9%	16%	17%	10%	6%	17%	10%
My landlord refuses to make repairs despite my requests	6%	20%	7%	10%	10%	5%	2%	13%	10%
I live too far from family/ friends/my community	6%	15%	6%	6%	13%	6%	5%	8%	9%
I don't feel safe in my building/ neighborhood	6%	13%	6%	6%	9%	5%	4%	8%	7%
I need help taking care of myself/my home and can't find or afford to hire someone	5%	14%	7%	5%	6%	5%	5%	6%	11%
I have bed bugs/insects or rodent infestation	5%	14%	8%	7%	5%	4%	4%	9%	9%
The HOA in my neighborhood won't let me make changes to my house or property	4%	14%	8%	4%	3%	3%	5%	3%	7%
None of the above	42%	18%	37%	24%	38%	58%	68%	21%	13%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

The above trends are similar for the **most acute housing affordability challenges**. As shown in Figure 7b, African American and Hispanic households, as well as renters and those precariously housed, experience affordability challenges at a higher rate than the county overall. Non-Hispanic White residents and homeowners experience these same challenges at a lower rate than the county.

- African American residents experience all five affordability challenges at a greater rate than the county overall.
- In addition to being more likely to not pay utility bills or rent on time, African American residents are more than four times as likely than the average county respondent to have a Section 8 voucher and worry that their landlord will raise their rent more than the voucher payment.
- Along with African American residents, Hispanic households, renters, and precariously housed households are most likely to experience difficulty paying utility bills, as well as have bad credit or eviction/foreclosure history impacting their ability to find a place to rent.
- These groups, with the exception of those precariously housed, are also more likely to be late on their rent payments.

Figure 7b.
Top 5 Affordability Challenges Experienced by Race/Ethnicity and Tenure

25% Above County average

25% Below County average

Affordability Challenges	County	African American	Asian	Hispanic	Other Race	Non-Hispanic White	Homeowner	Renter	Precariously Housed
Valid cases	2,130	132	487	391	146	739	983	953	293
I can't keep up with my utilities	10%	22%	11%	17%	14%	5%	5%	15%	15%
I'm often late on my rent payments	8%	13%	6%	12%	12%	4%	1%	15%	8%
I can't keep up with my property taxes	6%	16%	8%	4%	5%	7%	9%	5%	14%
I have bad credit/history of evictions/foreclosure and cannot find a place to rent	4%	5%	3%	8%	4%	2%	1%	6%	11%
I have Section 8 and I am worried my landlord will raise my rent higher than my voucher payment	4%	18%	5%	6%	7%	2%	2%	7%	8%
None of the above	73%	32%	70%	63%	64%	83%	84%	61%	54%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

As shown in Figure 7c, African American and precariously housed residents experience neighborhood challenges at a higher rate than the county. These two groups experience neighborhood issues related to transportation more acutely than county residents overall. In addition to Other Race respondents, they are also more likely to identify the lack of job opportunities in their respective neighborhoods.

Additionally, Hispanic residents are more likely to live in neighborhoods with poor performing schools than the average county respondent. Homeowners are also more likely to report that they cannot access public transit easily or safely.

Figure 7c.
Top 5 Neighborhood Challenges Experienced by Race/Ethnicity and Tenure

25% Above County average

25% Below County average

Neighborhood Challenges	County	African American	Asian	Hispanic	Other Race	Non-Hispanic White	Homeowner	Renter	Precariously Housed
Valid cases	2,079	133	486	389	146	737	975	918	284
My neighborhood does not have good sidewalks, walking areas, and/or lighting	17%	14%	17%	19%	16%	18%	18%	15%	18%
Schools in my neighborhood are poor quality	15%	13%	18%	20%	17%	13%	18%	13%	13%
Bus/rail does not go where I need to go or does not operate during the times I need	15%	33%	16%	13%	17%	17%	17%	14%	24%
I can't get to public transit/bus/light rail easily or safely	14%	24%	15%	11%	16%	16%	18%	11%	19%
There are not enough job opportunities in the area	12%	22%	14%	12%	19%	9%	9%	15%	20%
None of the above	50%	23%	46%	48%	45%	53%	49%	51%	36%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Differences in needs by household status. As shown in Figure 8a, single parents, households making less than $50,000, households with children under 18 and households with a member experiencing a disability are more likely to experience housing challenges. Conversely, households making more than $100,000 experience nearly all specified housing challenges at a lower rate than the county.

Single parents experience all ten housing challenges at a greater rate than the county overall.

Households making less than $25,000 also experience every challenge at a higher rate, with the exception of *I worry that if I request a repair it will result in a rent increase or eviction.*

Households making less than $50,000, single parents, and households with children under 18 are more likely to experience the following challenges:

- My house or apartment isn't big enough for my family;
- My house or apartment is in bad condition;
- My landlord refuses to make repairs despite my request;
- I live too far from family/friends/my community;
- I don't feel safe in my building/neighborhood;
- I need help taking care of myself/my home and can't find or afford to hire someone; and
- I have bed bugs/insects or rodent infestation.

Households with a member experiencing a disability are also more likely to experience landlords refusing their requests to make repairs, living further away from family/friends/community, and not being able to find or afford someone to help take care of themselves or their homes. These households are also more likely to experience bed bugs, insects, or rodent infestation, as well as HOA restrictions impacting their ability to make changes to their home or property.

Additionally, large households have the highest proportion of respondents among the selected groups that would like to move but can't afford anything that is available.

Figure 8a.
Top 10 Housing Challenges Experienced by Income and Household Characteristics

25% Above County average

25% Below County average

Housing or Neighborhood Condition	County	Less than $25,000	$25,000-$49,999	$50,000-$99,999	Above $100,000	Children under 18	Large Households	Single Parent	Disability	Adults (age 65+)
Valid cases	2,159	280	260	505	701	827	278	240	701	709
I would like to move but I can't afford anything that is available/income too low	31%	47%	48%	37%	16%	35%	51%	40%	36%	25%
My house or apartment isn't big enough for my family	20%	25%	25%	23%	16%	34%	43%	32%	20%	13%
I worry that if I request a repair it will result in a rent increase or eviction	14%	16%	18%	19%	9%	19%	19%	28%	16%	11%
My home/apartment is in bad condition	11%	15%	20%	12%	6%	15%	17%	17%	12%	9%
My landlord refuses to make repairs despite my requests	6%	13%	13%	8%	2%	9%	8%	14%	10%	6%
I live too far from family/ friends/my community	6%	9%	9%	6%	5%	10%	5%	10%	8%	6%
I don't feel safe in my building/ neighborhood	6%	9%	9%	6%	3%	8%	4%	10%	7%	5%
I need help taking care of myself/my home and can't find or afford to hire someone	5%	9%	9%	5%	3%	7%	6%	12%	11%	6%
I have bed bugs/insects or rodent infestation	5%	10%	9%	5%	3%	9%	4%	15%	9%	6%
The HOA in my neighborhood won't let me make changes to my house or property	4%	7%	3%	4%	3%	7%	4%	11%	6%	5%
None of the above	42%	21%	21%	37%	61%	28%	26%	12%	32%	49%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

As shown in Figure 8b, households making less than $50,000, as well as large households, single parents, households with children under 18, and households with a member experience a disability, experience the most acute affordability challenges at a higher rate than the county overall. Households making more than $50,000 and adults over the age of 65 are less likely to experience affordability challenges.

Households making between $25,000-$50,000, single parents, and households with children under 18 experience all five affordability challenges at a greater rate than the average county respondent.

Of households experiencing major affordability issues, **single parent households are most acutely impacted.** These households are more than three times as likely to have a Section 8 voucher and fear their landlord will raise the rent impacting the viability of their voucher, more than twice as likely to miss utility payments and have bad credit/eviction or foreclosure history impacting their ability to rent, and twice as likely to have trouble keeping up with their property taxes.

Figure 8b.
Top 5 Affordability Challenges Experienced by Income and Household Characteristics

25% Above County average

25% Below County average

Affordability Challenges	County	Less than $25,000	$25,000-$49,999	$50,000-$99,999	Above $100,000	Children under 18	Large Households	Single Parent	Disability	Adults (age 65+)
Valid cases	2,130	276	260	509	703	830	279	239	699	716
I can't keep up with my utilities	10%	16%	16%	12%	3%	16%	14%	23%	15%	8%
I'm often late on my rent payments	8%	19%	16%	6%	1%	11%	12%	15%	11%	4%
I can't keep up with my property taxes	6%	7%	9%	8%	5%	9%	4%	12%	8%	7%
I have bad credit/history of evictions/foreclosure and cannot find a place to rent	4%	8%	7%	4%	1%	5%	6%	10%	6%	3%
I have Section 8 and I am worried my landlord will raise my rent higher than my voucher payment	4%	11%	6%	4%	1%	7%	3%	14%	8%	5%
None of the above	73%	46%	56%	72%	90%	59%	70%	32%	59%	75%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

As shown in Figure 8c, households with children under 18, as well as single parents, households with a member experiencing a disability, and households making less than $25,000 are more likely to experience neighborhood challenges. These households are most likely to report that *the bus/rail does not go where I need to go or does not operate during the times I need.* In addition to households that make between $25,000-$100,000, these groups are more likely to identify the lack of job opportunities in their respective neighborhoods.

Households with children under 18 are more likely to live in neighborhoods with poor quality schools. Large households are more likely to report issues with neighborhood infrastructure (e.g., bad sidewalks, poor lighting) and households with a member experiencing a disability are more likely to report they cannot access public transit easily or safely.

Figure 8c.
Top 5 Neighborhood Challenges Experienced by Income and Household Characteristics

25% Above County average

25% Below County average

Neighborhood Challenges	County	Less than $25,000	$25,000-$49,999	$50,000-$99,999	Above $100,000	Children under 18	Large Households	Single Parent	Disability	Adults (age 65+)
Valid cases	2,079	273	259	503	709	824	277	234	692	714
My neighborhood does not have good sidewalks, walking areas, and/or lighting	17%	17%	15%	18%	17%	19%	22%	16%	19%	14%
Schools in my neighborhood are poor quality	15%	17%	14%	11%	19%	24%	19%	17%	14%	9%
Bus/rail does not go where I need to go or does not operate during the times I need	15%	19%	16%	15%	16%	19%	11%	28%	19%	16%
I can't get to public transit/bus/light rail easily or safely	14%	15%	12%	14%	14%	15%	12%	15%	19%	17%
There are not enough job opportunities in the area	12%	21%	17%	16%	6%	17%	12%	19%	15%	11%
None of the above	50%	40%	45%	51%	53%	38%	48%	31%	41%	53%

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Experience Finding Housing

This section explores residents' experience seeking a place to rent or buy in the county and the extent to which displacement—having to move when they do not want to move—is prevalent. For those respondents who seriously looked for housing in the past five years, this section also examines the extent to which respondents were denied housing to rent or buy and the reasons why they were denied.

Recent experience seeking housing to rent. Figure 9 presents the proportion of respondents who seriously looked to rent housing for the county, jurisdictions, and selected respondent characteristics, as well as the reasons for denial.

Over half of county respondents (56%) have seriously looked for housing in the past five years. The **most common reasons for denial** included:

- Landlord not returning the respondent's call (26%),
- Landlord told me the unit was available over the phone but when I showed up in person, it was no longer available (22%), and
- Landlord told me it would cost more because of my service or emotional support animal (14%).

Jurisdictions with the highest percentage of respondents who seriously looked for housing include Millbrae (74%), San Mateo (73%), and Redwood City (72%). While all three jurisdictions reported that *landlord not returning the respondent's call* was one of their main reasons for denial, 18% of Redwood City respondents identified *landlord told me they do not accept Section 8 vouchers* as a main reason for denial.

Among respondents by race/ethnicity, 80% of African American respondents reported that they had seriously looked for housing in the past five years while the lowest percentage of respondents who reported seriously looking for housing were non-Hispanic White (46%). The main reasons for denial experienced by African American respondents included *landlord told me the unit was available over the phone but when I showed up in person, it was no longer available* (39%), *landlord told me it would cost more because of my service or emotional support animal* (34%), and *landlord told me I couldn't have a service or emotional support animal* (28%).

Among respondents by tenure, renters (75%) and precariously housed (74%) respondents reported the highest rates of seriously looking for housing.

Among respondents by income, households making less than $25,000 (71%) had the highest rate. The main reasons for denial reported by these households were *landlord told me I couldn't have a service or emotional support animal* (36%) and *landlord told me it would cost more because of my service or emotional support animal* (30%).

Single parents (79%) and households with children under 18 (66%) also reported the highest percentage of those who seriously looked for housing in the past five years among the selected household characteristics respondent groups. In addition to sharing the top two reasons for denial with the county, 25% of single parent household respondents also reported they were denied housing because the *landlord told me I can't have a service or emotional support animal.*

Figure 9. If you looked seriously for housing to rent in San Mateo County in the past five years, were you ever denied housing?

		Reason for Denial									
	Overall Percent Seriously Looked for Housing	Landlord did not return calls and/or emails asking about a unit	Landlord said unit was available over phone, but when I showed up in person, it was no longer available	Landlord told me it would cost me more for my service or emotional animal	Landlord told me I can't have a service or emotional support animal	Landlord told me it would cost me more to rent because I have children	Landlord told me they don't rent to families with children	Landlord told me they do not accept Section 8 vouchers	Landlord told me they couldn't make changes to the apartment/ home for my disability	None of the Above	n
Jurisdiction											
County	56%	26%	22%	14%						45%	928
Belmont	62%	33%	27%							31%	49
Brisbane	59%		41%			22%				26%	27
Burlingame	48%	19%	23%							54%	57
Daly City	63%	33%	16%			16%				44%	61
East Palo Alto	58%	35%	30%							26%	23
Foster City	50%	12%		16%	14%					55%	51
Half Moon Bay	68%					17%	17%			48%	29
Hillsborough	42%		14%	29%	14%					57%	14
Milbrae	74%	25%	46%							36%	28
Pacifica	51%	16%	26%						16%	55%	31
Redwood City	72%	31%						18%		40%	99
San Bruno	57%			22%		22%				39%	36
San Mateo	73%	30%	34%							39%	98
South San Francisco	47%	24%	13%							56%	248
Race/Ethnicity											
African American	80%		39%	34%	28%					15%	101
Asian	56%	19%	29%							40%	199
Hispanic	63%	32%	22%							41%	230
Other Race	70%	29%	22%							45%	91
Non-Hispanic White	46%	29%	20%							48%	263
Tenure											
Homeowner	36%		25%						15%	54%	183
Renter	75%	29%	22%							43%	641
Precariously Housed	74%	23%	32%							26%	188
Income											
Less than $25,000	71%			30%	36%					29%	182
$25,000-$49,999	60%	39%	32%							27%	149
$50,000-$99,999	58%	24%		20%						45%	251
Above $100,000	48%	19%	14%							64%	216
Household Characteristics											
Children under 18	66%	30%	29%							33%	447
Large Households	60%	33%	19%			18%				44%	139
Single Parent	79%	25%	35%		25%					19%	173
Disability	63%	24%	24%							34%	386
Older Adults (age 65+)	48%	20%	29%							39%	282

Note: The "Percent Seriously Looked for Housing" column includes all respondents, not just those who indicated they rent.

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Recent experience seeking housing to buy. Figure 10 presents the proportion of respondents who seriously looked to buy housing in the county, by jurisdiction, and selected respondent characteristics, as well as the reasons for denial. As noted above, 56% of county respondents have seriously looked for housing in the past five years.

The most common reasons for denial included:

- Real estate agent told me I would need to show I was prequalified with a bank (29%) and
- A bank would not give me a loan to buy a home (23%).

For the jurisdictions with the highest percentage of respondents who seriously looked for housing (Millbrae, San Mateo and Redwood City), all three cities shared the same top two reasons for denial as the county. Additionally, 21% of Millbrae respondents reported that *the real estate agent would not make a disability accommodation when I asked*.

For African American respondents who looked to buy housing in the last five years, the most common reason for denial was *the real estate agent would not make a disability accommodation when I asked* (47%). African Americans, along with Other Races, also most commonly reported that they needed a loan prequalification before real estate agents would work with them. While between 43-54% of respondents from other racial/ethnic groups reported they did not experience any reason for denial when seriously looking to buy housing over the past five years, 12% of African American respondents reported similarly.

Among respondents by income, the main reasons for denial for households making less than $25,000 were *the real estate agent told me I would need to show I was prequalified with a bank* (32%) and *real estate agent only showed me or only suggested homes in neighborhoods where most people were of my same race or ethnicity* (26%).

Among the selected housing characteristics category, single parent households and households with children under 18 reported shared the same top two reasons for denial as the county. Additionally, 36% of single parent household respondents reported that *the real estate agent would not make a disability accommodation when I asked*, as well as 25% of respondents over the age of 65.

Residents in Redwood City, Millbrae, and South San Francisco, as well as large households, also reported that *a bank or other lender charged me a high interest rate on my home loan* as a reason for denial.

Figure 10. If you looked seriously for housing to buy in San Mateo County in the past five years, were you ever denied housing?

	Percent Seriously Looked for Housing	Reason for Denial						n
		The real estate agent told me I would need to show I was prequalified with a bank	A bank or other lender would not give me a loan to buy a home	The real estate agent would not make a disability accommodation when I asked	Only showed homes in neighborhoods where most people were same race/ethnicity	A bank or other lender charged me a high interest rate on my home loan	None of the Above	
Jurisdiction								
County	**56%**	29%	23%				50%	870
Belmont	**62%**	21%			15%		35%	48
Brisbane	**59%**	36%			30%		42%	33
Burlingame	**48%**	22%	14%				61%	51
Daly City	**63%**	19%	27%				56%	52
East Palo Alto	**58%**	24%	33%				48%	21
Foster City	**50%**	25%	20%				49%	51
Half Moon Bay	**68%**	35%	23%	23%			50%	26
Hillsborough	**42%**	18%		23%			59%	22
Milbrae	**74%**	25%	29%	21%		21%	54%	28
Pacifica	**51%**	35%	35%				42%	31
Redwood City	**72%**	30%	22%			27%	50%	64
San Bruno	**57%**	14%	21%				62%	42
San Mateo	**73%**	40%	32%				38%	82
South San Francisco	**47%**	26%	18%			16%	57%	251
Race/Ethnicity								
African American	**80%**	40%	38%	47%			12%	89
Asian	**56%**	30%	25%				43%	223
Hispanic	**63%**	29%	28%				49%	174
Other Race	**70%**	36%	21%			21%	50%	90
Non-Hispanic White	**46%**	29%	23%				54%	250
Tenure								
Homeowner	**36%**	29%	17%				54%	332
Renter	**75%**	32%	27%				46%	467
Precariously Housed	**74%**	36%	36%	30%			30%	154
Income								
Less than $25,000	**71%**	32%	25%		26%		41%	131
$25,000-$49,999	**60%**	42%	40%				29%	106
$50,000-$99,999	**58%**	35%	30%				38%	216
Above $100,000	**48%**	22%	13%			10%	64%	296
Household Characteristics								
Children under 18	**66%**	33%	28%				40%	443
Large Households	**60%**	33%	25%			25%	49%	126
Single Parent	**79%**	38%	43%	36%			24%	143
Disability	**63%**	35%	26%				38%	330
Older Adults (age 65+)	**48%**	35%	29%	25%			38%	252

Note: The "Percent Seriously Looked for Housing" column includes all respondents, not just those who indicated they buy.

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Denied housing to rent or buy. Figure 11 presents the proportion of those who looked and were denied housing to rent or buy for the county, jurisdictions, and selected respondent characteristics, as well as reason for denial. As shown, nearly 4 in 10 county respondents who looked for housing experienced denial of housing. African American/Black respondents, precariously housed respondents, households with income below $50,000, and single parent respondents have denial rates of 60% or higher. African American (79%) and single parent (74%) respondents report the highest rates of denial.

Among the reasons for denial:

- ***Income too low* was a major reason for denial for all groups** except homeowners and households with incomes above $100,000. Additionally, all jurisdictions report this as a common reason for being denied housing with the exception of Foster City, Hillsborough, and San Bruno.

- *Haven't established a credit history or no credit history* was also a common reason of denial for most groups. The impacts are higher for Asian, Hispanic and African American households, along with renter and precariously housed respondents, households with income below $50,000, and single parent households, households with children under 18, households with a member experiencing a disability, and several jurisdictions.

- Another top denial reason among certain groups is the *landlord didn't accept the type of income I earn (social security or disability benefit or child support)*. **Source of income was the most common reason for denial among African American households** (28%). Other groups with denial rates of 25% or higher for this specific issue include precariously housed respondents, single parent households, and households with a member experiencing a disability, as well as Foster City and San Bruno residents.

- *Bad credit* is another barrier for accessing housing, particularly for Hispanic and Other Race households, households with income between $50,000-$100,000, and large households. This also impacts East Palo Alto, San Mateo, Daly City, Redwood City, Burlingame, and South San Francisco residents at a higher rate.

Figure 11. If you looked seriously for housing to rent or buy in San Mateo County in the past five years, were you ever denied housing?

			Reason for Denial												
	Percent Denied Housing	Total n	Bad Credit	Eviction history	Income too low	Too many people in my household	Other renter/ applicant willing to pay more for rent	Haven't established a credit history/no credit history	Don't have a regular/ steady job/ consistent work history	Landlord didn't accept the type of income I earn (social security or disability)	Lack of stable housing record	Real or perceived sexual orientation or gender identity	I had/ have COVID	Foreclosure	n
Jurisdiction															
County	**39%**	1154	18%		44%		19%	21%							449
Belmont	**52%**	50			38%		27%	27%							26
Brisbane	**42%**	38			25%			19%				31%			16
Burlingame	**30%**	71	24%		29%										21
Daly City	**49%**	73	28%		53%		28%		19%						36
East Palo Alto	**55%**	29	38%		44%			25%							16
Foster City	**30%**	63							25%	40%	30%				19
Half Moon Bay	**41%**	34			29%			29%							14
Hillsborough	**23%**	22										40%			5
Milbrae	**36%**	33			67%	25%		33%					25%		12
Pacifica	**38%**	39			47%			27%	33%						15
Redwood City	**41%**	105	28%		63%	26%		26%							43
San Bruno	**25%**	51		31%						31%	38%				13
San Mateo	**48%**	112	30%		38%						28%				53
South San Francisco	**30%**	331	19%		58%		28%			17%					98
Race/Ethnicity															
African American	**79%**	107		25%	25%			25%		28%		27%			85
Asian	**42%**	281			38%			28%		21%		21%			117
Hispanic	**49%**	253	28%		60%		26%	26%							125
Other Race	**43%**	105	22%		49%		24%								45
Non-Hispanic White	**31%**	351			40%			19%	23%		25%				108
Tenure															
Homeowner	**26%**	348								24%	22%	23%			91
Renter	**45%**	687			48%		20%	24%							310
Precariously Housed	**61%**	208			42%			22%		25%					126
Income															
Less than $25,000	**64%**	199			47%			31%	29%						127
$25,000-$49,999	**65%**	158			48%			21%		20%	20%				103
$50,000-$99,999	**38%**	302	21%		51%	24%									114
Above $100,000	**18%**	346				27%	16%			20%				16%	64
Household Characteristics															
Children under 18	**51%**	558			42%			26%		19%					283
Large Households	**43%**	171	27%		64%	41%									74
Single Parent	**74%**	189			41%			27%		25%					138
Disability	**54%**	446			39%			21%		25%					239
Older Adults (age 65+)	**44%**	350			35%					22%		21%			153

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Experience using housing vouchers. It is **"difficult" or "very difficult" for eight out of 10 voucher holders to find a landlord that accepts a housing voucher** (Figure 13).

As shown in Figure 12, this is related to the amount of the voucher and current rents and the lack of supply (inability to find a unit in the allotted amount of time). Over half of voucher holders (53%) who experienced difficulty indicated the *voucher is not enough to cover the rent for places I want to live* and almost half of voucher holders (49%) who experienced difficulty indicated there is *not enough time to find a place to live before the voucher expires.*

Other significant difficulties using vouchers identified by respondents included *landlords have policies of not renting to voucher holders* (46%) and *can't find information about landlords that accept Section 8* (36%).

Among respondents by race/ethnicity, African American respondents had the greatest proportion of those with a housing choice voucher (60%). Of those respondents, 76% found it difficult to find a landlord that accepts a housing voucher. While 13% of Hispanic respondents have a housing voucher, 85% have found it difficult to use the voucher. Fourteen percent of Asian respondents have housing vouchers—nearly three quarters of these respondents reported that the *voucher is not enough to cover the rent for the places I want to live*.

Other groups of respondents with higher proportions of voucher utilization include single parent households (43%), precariously housed respondents (30%), and households with income below $25,000 (29%). For each of the aforementioned groups, more than 75% of their respective respondents reported difficulty in utilizing the housing choice voucher. The *voucher is not enough to cover the rent for places I want to live* was one of the main reasons cited for not using the voucher.

Figure 12. Why is it difficult to use a housing voucher?

Source:

Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

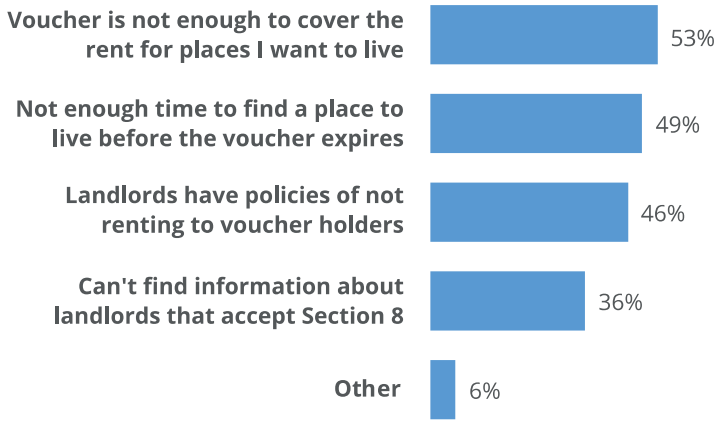


Figure 13. How difficult is it to find a landlord that accepts a housing voucher?

	Percent with a Housing Voucher	Not difficult	Somewhat difficult	Very difficult	n	Voucher is not enough to cover the rent for places I want to live	Not enough time to find a place to live before the voucher expires	Landlords have policies of not renting to voucher holders	Can't find information about landlords that accept Section 8	Other	n
Jurisdiction											
County	**12%**	18%	55%	27%	250	53%	49%	46%	36%	6%	203
Belmont	**16%**	14%	64%	21%	81	45%	64%	36%	27%	9%	11
Brisbane	**22%**	20%	73%	7%	15	50%	50%	42%	33%	0%	12
Burlingame	**8%**	0%	75%	25%	12	50%	50%	25%	8%	0%	12
Daly City	**12%**	14%	50%	36%	14	83%	25%	42%	17%	25%	12
East Palo Alto	**14%**	29%	57%	14%	7	20%	20%	40%	60%	0%	5
Foster City	**12%**	18%	47%	35%	17	47%	40%	27%	33%	7%	15
Half Moon Bay	**19%**	22%	56%	22%	9	71%	29%	29%	43%	14%	7
Hillsborough	**8%**	25%	75%	0%	4	67%	67%	33%	0%	0%	3
Milbrae	**22%**	50%	20%	30%	10	60%	40%	20%	40%	0%	5
Pacifica	**11%**	13%	50%	38%	8	86%	43%	43%	43%	0%	7
Redwood City	**16%**	13%	61%	26%	23	40%	50%	70%	45%	5%	20
San Bruno	**12%**	9%	64%	27%	11	40%	60%	50%	10%	10%	10
San Mateo	**24%**	24%	50%	26%	38	43%	54%	43%	39%	7%	28
South San Francisco	**4%**	11%	33%	56%	27	63%	50%	71%	63%	8%	24
Race/Ethnicity											
African American	**60%**	24%	60%	16%	82	55%	52%	40%	31%	6%	62
Asian	**14%**	23%	63%	14%	71	73%	44%	31%	31%	0%	55
Hispanic	**13%**	15%	40%	45%	53	58%	42%	51%	49%	11%	45
Other Race	**19%**	29%	50%	21%	28	55%	45%	65%	35%	5%	20
Non-Hispanic White	**8%**	14%	61%	25%	64	43%	61%	57%	38%	4%	56
Tenure											
Homeowner	**8%**	23%	59%	18%	78	58%	49%	42%	31%	0%	59
Renter	**18%**	19%	52%	30%	165	55%	52%	48%	43%	6%	134
Precariously Housed	**30%**	14%	66%	20%	86	57%	54%	35%	26%	7%	74
Income											
Less than $25,000	**29%**	17%	58%	25%	84	47%	41%	47%	37%	10%	70
$25,000-$49,999	**18%**	17%	52%	31%	48	63%	55%	63%	40%	5%	40
$50,000-$99,999	**12%**	23%	52%	26%	62	55%	55%	51%	37%	2%	49
Above $100,000	**5%**	20%	57%	23%	35	43%	61%	29%	32%	4%	28
Household Characteristics											
Children under 18	**21%**	20%	60%	20%	179	59%	51%	44%	35%	1%	143
Large Households	**7%**	20%	45%	35%	20	63%	56%	63%	56%	6%	16
Single Parent	**43%**	17%	58%	24%	103	62%	52%	38%	33%	2%	85
Disability	**22%**	18%	58%	24%	158	57%	52%	42%	29%	5%	129
Older Adults (age 65+)	**17%**	18%	63%	19%	123	56%	53%	44%	34%	3%	102

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Displacement. Figure 14 presents the proportion of residents who experienced displacement in the past five years, as well as the reason for displacement.

- Overall, 21% of survey respondents experienced displacement in the past five years. Among all survey respondents, the **main reason for displacement was rent increased more than I could pay** (29%).
- Respondents who are precariously housed have higher rates of recent displacement than homeowners or renters; this suggests that when displaced a unit these housing-insecure tenants are more likely to couch surf or experience homelessness for some period of time before securing a new place to live.
- Among respondents by race/ethnicity, **African American respondents reported the highest rate of displacement** (59%). The primary reason reported by African American respondents for their displacement was *housing was unsafe (e.g., domestic assault, harassment)*. Twenty eight percent also reported that they were *forced out for no reason*.
- Asian households, as well as homeowners, households that make less than $25,000, single parent households, households that include a member experiencing a disability, and Millbrae, Brisbane and Pacifica residents are also more likely than other respondents to have been displaced due to an unsafe housing situation (e.g., domestic assault, harassment).
- Additionally, Asian, precariously housed respondents, households making less than $25,000, single parent households, and Hillsborough residents are more likely than other respondents to have been displaced and not given a reason.

For respondents that had experienced displacements, they were asked to identify which city they moved from and which city they moved to. **The most common moves to and from cities included**:

- Moved within South San Francisco (28 respondents)
- Moved from outside San Mateo County to San Mateo (10 respondents)
- Moved from San Bruno to South San Francisco (9 respondents)
- Moved from Daly City to South San Francisco (9 respondents)
- Moved within Burlingame (8 respondents)

Figure 14. Displacement Experience and Reasons for Displacement

	Percent Displaced	Total n	Reason for Displacement														
			Rent increased more than I could pay	Personal/ relationship reasons	Landlord was selling the home/ apartment	Landlord wanted to move back in/move in family	Landlord wanted to rent to someone else	Landlord refused to renew my lease	Housing was unsafe (e.g., domestic assault, harassment)	Forced out for no reason	Health/medical reasons	I was behind on rent	Poor condition of property	Because of apartment rules	Utilities were too expensive/ shut off	Natural disaster/ flooding/ fire	n
Jurisdiction																	
County	**21%**	2066	29%	19%	18%												417
Belmont	**26%**	80	25%					25%						30%			20
Brisbane	**24%**	67				25%			31%			25%					16
Burlingame	**22%**	152	24%		30%	18%											33
Daly City	**25%**	115	35%	27%						31%							26
East Palo Alto	**32%**	50	20%	20%			20%										15
Foster City	**11%**	130			21%	21%				21%	43%						14
Half Moon Bay	**31%**	51			31%	25%											16
Hillsborough	**12%**	52				33%	33%			33%	33%		33%				6
Milbrae	**27%**	44					42%		33%		25%					25%	12
Pacifica	**21%**	75			31%				31%	31%							16
Redwood City	**29%**	146	31%									21%					42
San Bruno	**25%**	89	33%	29%					24%								21
San Mateo	**37%**	153	35%	31%							20%						54
South San Francisco	**12%**	712	42%	15%	16%												81
Race/Ethnicity																	
African American	**59%**	134				29%			30%	28%							79
Asian	**22%**	500				31%			22%	22%							109
Hispanic	**29%**	397	33%	22%									18%				115
Other Race	**28%**	149	54%						20%						24%		41
Non-Hispanic White	**14%**	757	27%	20%	31%												102
Tenure																	
Homeowner	**8%**	975		27%		25%			31%								75
Renter	**34%**	905	32%	18%	22%												292
Precariously Housed	**48%**	280	23%				24%			23%							132
Income																	
Less than $25,000	**45%**	282	28%	20%					20%	20%							127
$25,000-$49,999	**30%**	265	31%		19%							18%					78
$50,000-$99,999	**22%**	517	32%	22%	18%												115
Above $100,000	**8%**	721			27%	20%	23%										60
Household Characteristics																	
Children under 18	**30%**	840	27%			20%	19%										249
Large Households	**20%**	284	32%		19%								18%				57
Single Parent	**55%**	240				24%			24%	20%							131
Disability	**34%**	711	26%	20%			20%		20%								241
Older Adults (age 65+)	**22%**	736	23%	22%		22%											162

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Children changing schools after displacement. Overall, for households with children that were displaced in the past five years, **60% of children in those households have changed schools**. The most common outcomes reported among these respondents included *school is more challenging* (28%), *they feel less safe at the new school* (25%), and *they are in a worse school* (24%) (Figure 15).

Among respondents by race/ethnicity, non-Hispanic White households (44%) were the only subgroup to report that being displaced resulted in their children being in better schools. Of African American households that were displaced and have children, 87% reported that their children changed schools. Of these respondents, 32% reported that their children *feel safer at the new school* but also *have fewer activities.*

Among respondents by tenure, precariously housed (78%) and homeowner (74%) households had the highest proportion of children who changed schools. The most common outcomes for precariously housed households included *School is less challenging/they are bored* (35%) and their children *feel less safe at school* (34%). For homeowner households, 39% reported that *school is more challenging,* followed by 31% who reported that their children *feel less safe at school*.

Among respondents by selected household characteristics, older adult (77%), single parent (74%), households with a member experiencing a disability (70%), and households with children under 18 (67%) all reported high proportions of children who changed schools. The most common outcomes for these respondents included *School is more challenging* and *they feel less safe at the new school.*

Figure 15. Children Changing Schools and Outcomes, Displaced Households

	Percent of Children that Changed Schools	Total n	School change outcomes									
			School is less challenging/ they are bored	School is more challenging	They are in a better school	They are in a worse school	They feel less safe at the new school	They feel safer at the new school	They have fewer activities	They have more activities	Things are about the same	n
Jurisdiction												
County	60%	306		28%		24%	25%					183
Belmont	45%	20		33%		44%	33%					9
Brisbane	81%	16		38%			31%	31%				13
Burlingame	55%	22	33%	33%						33%		12
Daly City	41%	17	43%		29%		29%			29%		7
East Palo Alto	54%	13	43%	57%			29%					7
Foster City	62%	13								50%		8
Half Moon Bay	58%	12		43%			29%	29%	43%			7
Hillsborough	60%	5						67%				3
Milbrae	82%	11		33%		44%	44%	33%				9
Pacifica	91%	11				50%						10
Redwood City	52%	23			25%	33%		25%				12
San Bruno	67%	18	33%		33%		33%					12
San Mateo	66%	35	32%		32%							22
South San Francisco	36%	56		26%	26%						26%	19
Race/Ethnicity												
African American	87%	69	30%	30%				32%	32%			60
Asian	73%	91	27%	32%		32%	27%					66
Hispanic	49%	91		23%		30%	23%		25%			44
Other Race	65%	31		40%		30%	25%	25%				20
Non-Hispanic White	60%	60	28%	31%	44%		28%					36
Tenure												
Homeowner	74%	66		39%		29%	31%					49
Renter	58%	213	25%	30%			25%					122
Precariously Housed	78%	104	35%				34%		30%			80
Income												
Less than $25,000	65%	92	22%	32%			35%					60
$25,000-$49,999	66%	56	25%			28%		28%	25%			36
$50,000-$99,999	55%	85		30%	28%		23%					47
Above $100,000	59%	44	35%	31%		38%						26
Household Characteristics												
Children under 18	67%	237		32%		23%	25%					158
Large Households	45%	44		32%	26%						32%	19
Single Parent	74%	124		32%		28%	29%					92
Disability	70%	188	26%	28%			30%					132
Older Adults (age 65+)	77%	117		35%		29%	29%					89

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Experience with housing discrimination. Overall, **19% of survey respondents felt they were discriminated against when they looked for housing** in the area.[1] As shown in Figure 16, African American respondents (62%), single parent households (44%) and precariously housed respondents (39%) are most likely to say they experienced housing discrimination. Residents with income above $100,000 and homeowners are least likely (11%).

Respondents who believed they experienced discrimination when looking for housing in the county reported when the discrimination occurred. Nearly half of respondents (45%) reported that the discrimination they experienced occurred between 2 and 5 years ago. Twenty eight percent of respondents reported that the discrimination occurred in the past year, 20% reported more than 5 years ago and 7% of respondents did not remember when the discrimination occurred.

How discrimination was addressed. Respondents who believed they experienced discrimination when looking for housing in the county were asked to describe the actions they took in response to the discrimination. Overall, the most common responses to discrimination experienced by survey respondents were *Nothing/I wasn't sure what to do* (42%), *Moved/found another place to live* (30%), and *Nothing/I was afraid of being evicted or harassed* (20%).

Among top responses for actions taken in response to experienced discrimination, every group reported *Nothing/I wasn't sure what to do* with the exception of African American and single parent households, as well as Brisbane and Hillsborough residents. Similarly, survey respondents from Foster City and Pacifica were the only groups not to include *Moved/found another place to live* among their top responses. African American and Asian households, as well as single parent households, were more likely than other groups to contact either a housing authority, local fair housing organization, or the California Department of Housing or Civil Rights to report their discrimination incident.

Reasons for discrimination. Respondents who believed they experienced discrimination when looking for housing in the county provided the reasons why they thought they were discriminated against. Note that the basis offered by residents is not necessarily protected by federal, state, or local fair housing law, as respondents could provide open-ended and multiple reasons why they thought they experienced discrimination.

Examples of how respondents described why they felt discriminated against, which they provided as open-ended responses to the survey, include:

[1] Note that this question applies to all respondents, not just those who seriously looked for housing in the past five years.

Appearance/Characteristics

- *"Because of my race and ethnicity"*
- *"[We] were given a subprime loan for home purchase for being Latinx, low-income and primarily Spanish-speaking; refinance last year was lower than expected."*
- *"It was clear my disability is the reason"*
- *"I have a child and a couple places told me they wouldn't rent to me due to my son."*
- *"The agent asked if I was a tech worker. When I said no, the agent said the place was just rented, even though it was on the listing as active."*
- *"I was approved for the unit and when they met my partner, who is Black, they said [the unit] was rented."*

Source of Income/Credit

- *"Income was through SSDI [social security disability insurance]"*
- *"The landlord wanted an excellent credit score…"*
- *"We were not able to provide all the requirement to rent, like SSN [social security number], income proof, employment, and we don't make enough income…"*
- *"They wanted someone with income from employment not due to disability."*
- *"I was discriminated against because of my race and the fact that I had Section 8 at the time. Being African American and having Section 8 made a lot of people feel like I wouldn't take care of their property."*
- *"I am currently being discriminated against due to my need with rental help and because two of us in our household have a need for an emotional support animal."*

Immigration status

- *Mi hermana llamo a los departamentos donde yo vivo y la manager le dijo que no había disponible pero no era verdad también le dijo que hablara inglés y le pidió seguro social pensando que no tenia y le dijo que tenía que ganar una cierta cantidad de dinero para poder rentar. (My sister called the apartments where I live and the manager told her that there was no one available but it was not true. She also told her to speak English and asked for social security thinking that she did not have it and told her that she had to earn a certain amount of money to be able to rent).*

Figure 16. Percent of respondents who felt they were discriminated against and how was it addressed

	Percent who felt they were discriminated against	In the past year	2 to 5 years ago	More than 5 years ago	Don't remember	n	Nothing/ I wasn't sure what to do	Moved/ found another place to live	Nothing/ I was afraid of being evicted/ harassed	Called/ emailed housing authority	Called/ emailed local fair housing organization	Called/ emailed California Department of Housing/ Civil Rights	Called/ emailed City office, County office, or human rights department/ agency	Filed a complaint	Other	n
Jurisdiction																
County	**19%**	28%	45%	20%	7%	357	42%	30%	20%							359
Belmont	**21%**	19%	56%	19%	6%	16	38%	38%	50%							16
Brisbane	**22%**	29%	36%	29%	7%	14		64%			21%		21%			14
Burlingame	**14%**	25%	50%	20%	5%	20	35%	25%		20%		20%				20
Daly City	**15%**	20%	40%	33%	7%	15	56%	25%	25%							16
East Palo Alto	**29%**	23%	54%	15%	8%	13	38%	38%	23%	23%						13
Foster City	**18%**	15%	40%	45%	0%	20	38%						24%	24%		21
Half Moon Bay	**26%**	27%	55%	9%	9%	11	27%	36%			36%					11
Hillsborough	**15%**	14%	71%	0%	14%	7		29%			57%					7
Milbrae	**29%**	36%	50%	7%	7%	14	31%	23%		38%		23%				13
Pacifica	**21%**	29%	36%	36%	0%	14	50%		21%	29%		21%			21%	14
Redwood City	**24%**	34%	34%	19%	13%	32	47%	26%	21%	21%						34
San Bruno	**12%**	30%	60%	0%	10%	10	50%	30%		30%	30%					10
San Mateo	**30%**	35%	45%	15%	5%	40	53%	26%	26%							38
South San Francisco	**13%**	30%	40%	23%	6%	82	59%	27%								83
Race/Ethnicity																
African American	**62%**	16%	59%	25%	0%	83		36%	29%	27%	26%	27%	24%			84
Asian	**16%**	24%	50%	20%	6%	82	28%	25%	29%	29%	24%	24%				83
Hispanic	**27%**	25%	42%	24%	8%	107	52%	27%								107
Other Race	**30%**	28%	47%	14%	12%	43	47%	30%	26%							43
Non-Hispanic White	**12%**	38%	41%	14%	7%	91	44%	27%	18%							91
Tenure																
Homeowner	**11%**	26%	46%	20%	7%	95	32%	29%	22%							96
Renter	**28%**	26%	47%	20%	6%	232	42%	32%	23%							232
Precariously Housed	**39%**	21%	54%	20%	4%	98	24%	28%		35%		26%				100
Income																
Less than $25,000	**36%**	29%	51%	11%	9%	100	39%	30%	25%							102
$25,000-$49,999	**24%**	31%	41%	22%	6%	64	42%	36%	25%	22%						64
$50,000-$99,999	**19%**	27%	45%	25%	3%	97	44%	29%			18%					97
Above $100,000	**11%**	28%	45%	21%	7%	76	45%	22%	16%	16%						76
Household Characteristics																
Children under 18	**26%**	21%	57%	15%	6%	216	36%	31%	26%							218
Large Households	**19%**	26%	52%	9%	13%	54	65%	24%	15%							55
Single Parent	**44%**	13%	65%	17%	5%	106		33%	32%	27%	26%	26%				107
Disability	**33%**	27%	48%	21%	4%	215	33%	30%		22%						219
Older Adults (age 65+)	**20%**	20%	51%	20%	8%	144	24%	34%	24%	24%						146

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Experience of persons with disabilities. Overall, 35% of respondents' households include a member experiencing a disability. Of these households, 26% said their housing does not meet their accessibility needs; 74% report that their current housing situation meets their needs. The three top greatest housing needs expressed by respondents included grab bars in bathroom or bench in shower (34%), supportive services to help maintain housing (33%), and ramps (26%). Other needs expressed by a substantial proportion of groups included *wider doorways, reserved accessible parking spot by the entrance,* and *more private space in the facility in which I live*.

Of respondents by jurisdiction, East Palo Alto (64%) has the lowest proportion of respondents with disabilities whose current housing situation meets their needs. Of these respondents, 63% indicated they needed supportive services to help maintain housing.

The highest proportion of respondents by group reporting that they or a member of their household experiences a disability were African American (71%), households making less than $25,000 (59%), single parent households (58%), and precariously housed respondents (56%).

Figure 17. Respondents experiencing a disability and their top three greatest housing needs

	Percent of respondents with a disability	Current housing situation meeting needs	Total n	Grab bars in bathroom or bench in shower	Supportive services to help maintain housing	Ramps	Wider doorways	Reserved accessible parking spot by entrance	More private space in the facility in which I live	Service or emotional support animal allowed	Would like to live alone (not with a roommate)	Fewer restrictions/ more freedom	Alarm to notify if a non-verbal child leaves the home	Fire alarm/doorbell made accessible for person with hearing disability/deaf	Better navigation for person who is blind	n
Jurisdiction																
County	35%	74%	711	34%	33%	26%										171
Belmont	35%	89%	28	67%	67%											3
Brisbane	37%	72%	25	29%	29%		29%	29%								7
Burlingame	27%	80%	41	63%	50%		50%									8
Daly City	34%	68%	38		36%		36%		45%		36%					11
East Palo Alto	44%	64%	22		63%											8
Foster City	31%	83%	40		29%		29%									7
Half Moon Bay	45%	68%	22	29%								29%				7
Hillsborough	26%	100%	13													n/a
Milbrae	40%	82%	17	25%					25%	25%			25%	25%	25%	4
Pacifica	39%	93%	29				100%									2
Redwood City	42%	68%	62	33%	28%	28%			33%							18
San Bruno	40%	82%	34	50%		33%		33%								6
San Mateo	43%	72%	65	41%	47%					41%						17
South San Francisco	30%	68%	210	35%	28%	32%										57
Race/Ethnicity																
African American	71%	87%	95		40%		40%	33%								15
Asian	31%	77%	157	29%	34%	26%			26%							35
Hispanic	41%	70%	162	37%	54%				35%							46
Other Race	38%	71%	56	63%		50%	44%									16
Non-Hispanic White	32%	77%	241	33%		27%		21%								52
Tenure																
Homeowner	29%	82%	280	35%		37%		37%								43
Renter	39%	73%	347	41%	40%				27%							88
Precariously Housed	56%	71%	154		37%		26%				33%					43
Income																
Less than $25,000	59%	71%	167		42%				27%		23%					48
$25,000-$49,999	40%	67%	107		45%	45%	45%									31
$50,000-$99,999	35%	77%	180	43%	26%	24%										42
Above $100,000	23%	82%	167	52%		34%		41%								29
Household Characteristics																
Children under 18	35%	78%	293		40%		29%		32%							63
Large Households	35%	70%	99	41%	45%				34%							29
Single Parent	58%	81%	139		48%		28%		41%							29
Older Adults (age 65+)	46%	76%	337	44%	29%	30%										79

Source: Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

Transportation. Over 80% of respondents indicated the type of transportation used most often is driving a personal vehicle. This share was relatively similar across the majority of jurisdictions and was the number one type of transportation used across all jurisdictions and demographic characteristics.

The groups with the lowest proportion of those who primarily drive included African American (40%), households making less than $25,000 (53%), single parents (57%), and precariously housed (57%) respondents.

As shown in Figure 18, on average respondents are fairly satisfied with their transportation situation. Those groups somewhat or not at all satisfied with their transportation options include African American (58%), Brisbane (51%), single parents (45%) and precariously housed (44%) respondents.

Figure 18. Are you satisfied with your current transportation options?

Source:

Root Policy Research from the 2021-2022 21 Elements AFFH Resident Survey.

	Entirely satisfied	Mostly satisfied	Somewhat unsatisfied	Not at all satisfied	n
Jurisdiction					
County	29%	45%	20%	6%	1,903
Belmont	21%	42%	27%	10%	78
Brisbane	17%	33%	38%	13%	64
Burlingame	32%	45%	21%	1%	139
Daly City	19%	52%	20%	8%	109
East Palo Alto	31%	36%	24%	9%	45
Foster City	29%	43%	20%	9%	115
Half Moon Bay	30%	35%	26%	9%	46
Hillsborough	50%	34%	14%	2%	44
Milbrae	30%	45%	13%	13%	40
Pacifica	28%	42%	15%	15%	65
Redwood City	30%	36%	27%	8%	142
San Bruno	23%	54%	19%	4%	81
San Mateo	29%	52%	14%	4%	134
South San Francisco	34%	48%	15%	3%	666
Race/Ethnicity					
African American	22%	21%	48%	10%	134
Asian	23%	49%	24%	4%	500
Hispanic	29%	43%	22%	7%	397
Other Race	29%	41%	21%	9%	149
Non-Hispanic White	32%	45%	17%	5%	757
Tenure					
Homeowner	31%	45%	18%	6%	905
Renter	27%	44%	23%	6%	834
Precariously Housed	20%	36%	35%	9%	254
Income					
Less than $25,000	22%	39%	29%	10%	282
$25,000-$49,999	25%	42%	26%	8%	265
$50,000-$99,999	28%	52%	16%	4%	517
Above $100,000	34%	44%	18%	4%	721
Household Characteristics					
Children under 18	25%	43%	25%	6%	840
Large Households	29%	50%	18%	4%	284
Single Parent	20%	36%	38%	7%	240
Disability	25%	40%	27%	8%	658
Older Adults (age 65+)	30%	43%	21%	6%	736

Solutions offered by residents. Respondents were asked a series of questions about how to improve their situations related to housing, employment, health, education and neighborhood.

Improve housing security. When asked what could improve a respondent's housing security, the top answers among respondents by jurisdiction, race/ethnicity, tenure, income, and other selected housing characteristics were *none of the above* and *help me with a downpayment/purchase.*

The highest proportion of respondents among groups that selected *None of the above* includes:

- Hillsborough residents, 71%
- Owners, 65%
- Income greater than $100,000, 54%
- Foster City residents, 53%
- White, 51%
- Burlingame residents, 50%

The highest proportion of respondents among groups that selected *Help me with a downpayment or purchase* includes:

- Renters, 44%
- Large households, 42%
- Daly City residents, 41%
- Hispanic, 39%
- Precariously housed, 39%
- City of San Mateo residents, 37%

Other solutions to improve housing security identified by several different groups included *Help me with the housing search, help me pay rent each month,* and f*ind a landlord who accepts Section 8.* The highest proportion of respondents among groups that selected these solutions includes:

Help me with the housing search

- Precariously housed, 39%
- Income less than $25,000, 34%
- Income between $25,000-$50,000, 29%

- Half Moon Bay residents, 27%

Help me pay rent each month

- Income less than $25,000, 35%
- Single parent, 31%

Find a landlord who accepts Section 8

- Black or African American, 37%

Improve neighborhood situation. When asked what could improve a respondent's neighborhood situation, nearly every respondent group by jurisdiction, race/ethnicity, tenure, income, and other selected housing characteristics identified *Better lighting.* Other solutions flagged by multiple respondent groups to improve their neighborhood situations includes *Improve street crossings* and *none of the above.*

The highest proportion of respondents among groups that selected *Better lighting* includes:

- East Palo Alto residents, 45%
- Millbrae residents, 45%
- Other race, 42%
- Daly City residents, 41%
- Hispanic, 40%
- Income between $25,000-$50,000, 40%
- Income between $50,000-$100,000, 40%

The highest proportion of respondents among groups that selected *Improve street crossings* includes:

- City of San Mateo residents, 34%
- Single parent, 31%

The highest proportion of respondents among groups that selected *None of the above* includes:

- Foster City residents, 37%
- Hillsborough residents, 36%
- Burlingame residents, 28%

Additionally, 42% of Millbrae respondents chose *Reduce crime,* 40% of Brisbane respondents chose *More stores to meet my needs,* and Belmont (34%) and Half Moon Bay (33%) respondents chose *Build more sidewalks.*

Improve health situation. When asked what could improve a respondent's health situation, the majority of respondent groups by jurisdiction, race/ethnicity, tenure, income, and other selected housing characteristics selected *Make it easier to exercise, More healthy food* and *None of the above.*

The highest proportion of respondents among groups that selected *Make it easier to exercise* includes:

- Redwood City residents, 48%
- Hispanic, 42%
- South San Francisco residents, 41%
- City of San Mateo residents, 41%
- Asian, 41%
- Renters, 40%

The highest proportion of respondents among groups that selected *More healthy food* includes:

- East Palo Alto residents, 48%
- Precariously Housed, 47%
- Single parent, 41%
- Daly City residents, 40%
- Income less than $25,000, 38%
- Black or African American, 37%
- Large Households, 37%

The highest proportion of respondents among groups that selected *None of the above* includes residents from:

- Hillsborough residents, 48%
- Burlingame residents, 47%
- Foster City residents, 42%
- White, 41%
- Owners, 39%

Additionally, African American (34%) and San Bruno (29%) respondents identified *Better access to mental health care* as a solution to help improve their health situations.

Improve job situation. When asked what could improve a respondent's employment situation, the majority of respondent groups by jurisdiction, race/ethnicity, tenure, income, and other selected housing characteristics selected *Increase wages* and *None of the above.*

The highest proportion of respondents among groups that selected *Increase wages* includes:

- Renters, 52%
- Single parents, 50%
- Hispanic, 49%
- Households with children, 49%
- Daly City residents, 49%
- Income between $50,000-$100,000, 49%
- Large households, 48%

The highest proportion of respondents among groups that selected *None of the above* includes:

- Hillsborough residents, 76%
- Owners, 58%
- White, 57%
- Over 65+, 53%
- Income greater than $100,000, 53%
- Foster City residents, 53%

Additionally, 29% of households with income less than $25K identified *Find a job near my apartment or house* as a solution to help improve their situation.

Improve education situation. When asked what could improve a respondent's education situation for their children, the majority of respondent groups by jurisdiction, race/ethnicity, tenure, income, and other selected housing characteristics selected *None of the above, Have more activities,* and *Stop bullying/crime/drug use at school.*

The highest proportion of respondents among groups that selected *None of the above* includes:

- Burlingame residents, 55%

- White, 52%
- Over 65+, 51%
- Hillsborough residents, 49%
- Foster City residents, 46%
- Brisbane residents, 45%

The highest proportion of respondents among groups that selected *Have more activities* includes:

- Single parent, 45%
- Households with children, 41%
- Large households, 41%
- Other race, 37%
- Daly City residents, 34%
- Hispanic, 34%

The highest proportion of respondents among groups that selected *Stop bullying/crime/drug use at school* includes:

- East Palo Alto residents, 38%
- Precariously housed, 31%
- Other race, 30%
- Redwood City residents, 29%
- Hispanic, 29%
- San Mateo residents, 28%

Additionally, 29% of Millbrae respondents identified *Have better teachers at their schools* as a means to improve the education situation in their respective households.

AFFH Attachment C.3.
Disparate Access to Educational Opportunities

This section examines the extent to which members of protected classes and those in poverty experience disparities in access to opportunity as measured by access to education. This section draws from data provided by the San Mateo Office of Education, the California Department of Education, and U.S. Census American Community Surveys (ACS). This section discusses the following topics:

- Changes in school enrollment during COVID-19 by race and ethnicity, and by groups with extenuating circumstances;[1]
- Achievement gaps by race and ethnicity and for groups with extenuating circumstances as measured by test scores, California State University or University of California admissions standards, and college-going rates;
- Barriers to success measured by chronic absenteeism, dropout rates, and suspension rates.

After describing this section's primary findings, we describe the county's school districts before launching into data measuring achievement gaps and barriers to success.

Primary Findings

Student racial and ethnic diversity is modestly increasing. Student bodies in San Mateo County have become increasingly racially and ethnically diverse.

- Hispanic students make up the largest ethnic group in the county's schools, representing 38% of students in the 2020-2021 academic school year. This a slight increase from the 2010-2011 school year, where Hispanic students made up 37% of the population.
- There has been a large increase in Asian students, with 17% identifying as such in 2020-2021, an increase of 5 percentage points from 2010-2011.
- Students identifying as White (26%) have decreased by 3 percentage points since 2010-2011.

[1] The term "extenuating circumstances" is used in this section to capture students whose socioeconomic situations and/or disability may make standard educational environments challenging.

Free and reduced lunch-qualifying students and English language learners are concentrated in a handful of schools. Overall, 29% of public school students in San Mateo County qualify for reduced or free lunch.

- The rate of reduced lunch qualification was highest in Ravenswood City Elementary School District, where 83% of students qualify for reduced lunch. Also in Ravenswood City Elementary, 30% of students are experiencing homelessness. This is a large outlier in the county, where overall just 2% are experiencing homelessness.
- Countywide, 20% of public school students are English learners. Again, this rate is highest at Ravenswood City Elementary, where 53% of students are English learners. La Honda-Pescadero Unified School District, Jefferson Union High School, and Redwood City Elementary also have high rates of English learners, representing more than a third of students.

Enrollment is dropping. Public school enrollment reduced substantially in some areas during the pandemic. Total enrollment decreased by 3% between 2019-2020 and 2020-2021 in San Mateo County, which was the largest decrease of the decade.

- Portola Valley and La Honda-Pescadero school districts had the largest enrollment decreases during COVID-19, with a 11% and 10% decline in enrollments, respectively.
- Decreased enrollment was especially common among Pacific Islander students. Between 2019-2021, enrollment among Pacific Islander students decreased by 6% (from 1,581 students in 2019-20 to 1,484 students in 2020-21), substantially higher than the 3% countywide average.
- Enrollment among migrant students decreased drastically by 16% over the same period (from 332 students to 279 students).

Learning proficiency is improving yet disparities exist. Across all racial and ethnic groups, the rate at which students met or exceeded English and mathematics testing standards has increased since the 2014-2015 school year. Students with extenuating circumstances (i.e., disability, facing homelessness, learning English) tend to score lower on English and mathematics tests than the overall student body.

- Proficiency gaps are especially pronounced among English learning students in Portola Valley Elementary, Woodside Elementary, Menlo Park City Elementary, and Brisbane Elementary, where students with extenuating circumstances met or exceeded mathematics test standards at a rate at least 50 percentage points below the overall test rate in each district.
- Students with disabilities in San Carlos Elementary and Las Lomitas Elementary school districts scored far below the overall student body: In these districts, students with disabilities met or exceeded mathematics test standards at 54 percentage points below the overall test rate.

Many students meet admissions standards for CSU or UC schools.

- Among the high school districts in San Mateo County, Sequoia Union had the highest rate of graduates who met such admission standards, at 69%. On the other end of the spectrum, Cabrillo Unified and South San Francisco Unified had the lowest rates at 41%.
- Jefferson Union High School District had the most drastic increase in the share of graduates meeting CSU or UC standards: just 21% of students met these standards in 2016-2017 compared to 48% of students in 2019-2020. La Honda-Pescadero Unified School District experienced a 10 percentage point increase in this success rate over the same period.

Most school districts in the county have a college-going rate at 70% or higher—yet there are wide gaps by race and ethnicity.

- In every district, White students have a higher college-going rate than Hispanic students, but the largest gaps are in South San Francisco United, where 91% of White students go to college compared to just 68% of Hispanic students—a 23 percentage point gap.

Students with extenuating circumstances are highly concentrated in a few schools and move schools often due to housing instability.

- Students with extenuating circumstances may need additional resources—e.g., onsite health care, free meals, tutoring—to be successful in school. When these students are concentrated into a few schools, the schools bear an unequal responsibility for providing needed resources. K-12 school funding in California has long been inadequate, and, although policymakers have recently allocated additional resources to schools with high proportions of low income children under a "concentration grant" system, funding gaps remain.
- The highest concentration of high needs students is found in Ravenswood City Elementary, where 30% of all students are experiencing homelessness and 83% qualify for free and reduced lunch.
- Currently, students whose families have been evicted do not have protections allowing them to remain in their current school district. This can result in frequent changes in schools for low income children, raising their vulnerability to falling behind in school.

Absenteeism, dropout rates, and discipline rates are highest for students of color, students with disabilities, and students with other extenuating circumstances. While 10% of students were chronically absent during the 2018-2019 school year, chronic absenteeism rates were higher in districts with a large number of students experiencing economic and housing precarity.

- For instance, Ravenswood Elementary, which has a 30% rate of homelessness among students, had one of the higher rates of chronic absenteeism at 16%.

- Pacific Islander students (26%), Black/African American students (18%), and Hispanic students (15%) had notably higher rates of chronic absenteeism than the overall student population (10%).
- In most districts, chronic absenteeism is higher among students with disabilities. In fact, only Bayshore Elementary's students with disabilities had a lower rate of chronic absenteeism than the overall student body.

Dropout rates vary across the county:

- Dropout rates were highest in Sequoia Union High School District (10%) and South San Francisco Unified (9%).
- In all school districts in the county, dropout rates are higher for boys than for girls.
- Pacific Islander, Black/African American, and Hispanic students in the county often had higher dropout rates than those in other racial and ethnic groups
- Students with disabilities, students experiencing homelessness, foster youth, and students learning English had higher dropout rates than the overall population.

Discipline rates also vary by area and race and ethnicity.

- In many school districts across San Mateo County, Hispanic students are disciplined at disproportionately higher rates compared to their peers.
- In most districts, Black/African American and Pacific Islander students are also overrepresented in terms of suspension rates, but these rates are slight compared to those of Hispanic students.
- Asian and Filipino students were underrepresented in terms of suspension rates. White students were also underrepresented in discipline rates in most districts except for La Honda-Pescadero.

The demographics of faculty and staff are fairly similar to that of students.

- There is a slightly larger share of White and Black/African American staff than students, meaning that Black/African American and White student groups are more likely to interact with same-race staff and faculty than other racial groups.
- Asian students are less likely to interact with a same-race staff of faculty member: 17% of the student body is Asian compared to just 8% of staff and faculty.

Background

This section describes the school districts in San Mateo County, including their geographic boundaries and a brief history of the school districts' formation. This section also includes details on how districts' enrollments and student demographic have changed over time.

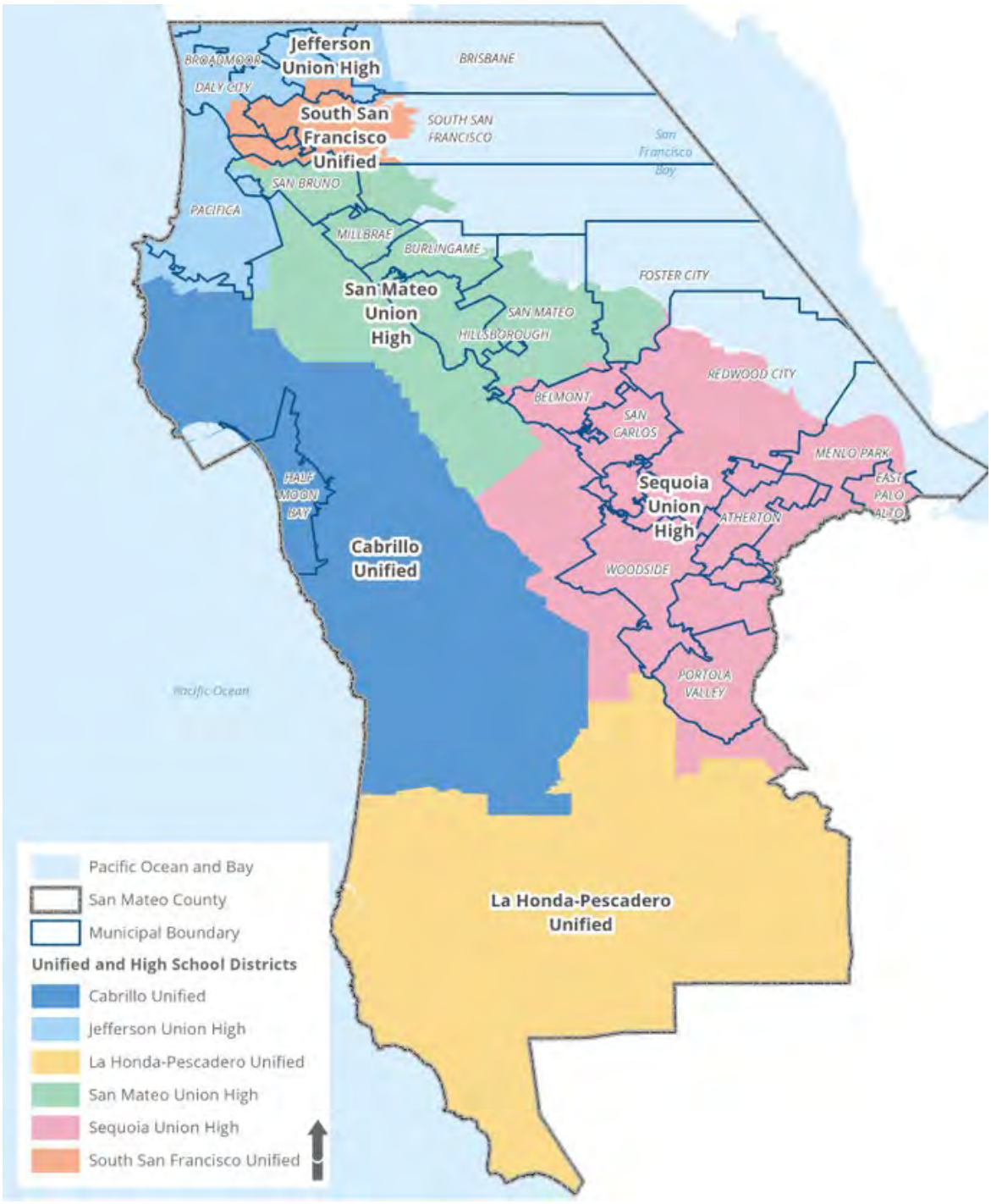
San Mateo County School Districts. There are three unified school districts in San Mateo County which include both elementary and high schools. These are **Cabrillo Unified School District, La Honda-Pescadero Unified School District**, and **South San Francisco Unified School District**.

In addition to the unified school districts, there are three high school districts, which include: **Jefferson Union High School District**, **San Mateo Union High School District**, and **Sequoia Union High School District**. The elementary schools covering these high schools' district boundaries areas are described below:

- In the **Jefferson Union High School District** geographic boundary, elementary school districts are the Bayshore Elementary School District, Brisbane School District, Jefferson Elementary School District, and Pacifica School District.
- Within the **San Mateo Union High School District** geographic boundary**,** elementary school districts include San Mateo-Foster City School District, Hillsborough City School District, Burlingame School District, San Bruno Park School District, and Millbrae School District.
- Within the **Sequoia Union High School District** geographic boundary, the elementary schools include Belmont-Redwood Shores School District, San Carlos School District, Redwood City School District, Ravenswood City School District, Menlo Park City School District, Woodside Elementary School District, Las Lomitas Elementary School District, and Portola Valley School District.

Geographic boundaries of school districts. Figure V-1 illustrates the geographic boundaries of the unified school districts as well as the three high school districts. Municipal boundaries are overlayed on the map.

Figure V-1.
Unified School Districts and High School Districts in San Mateo County



Source: San Mateo County Office of Education.

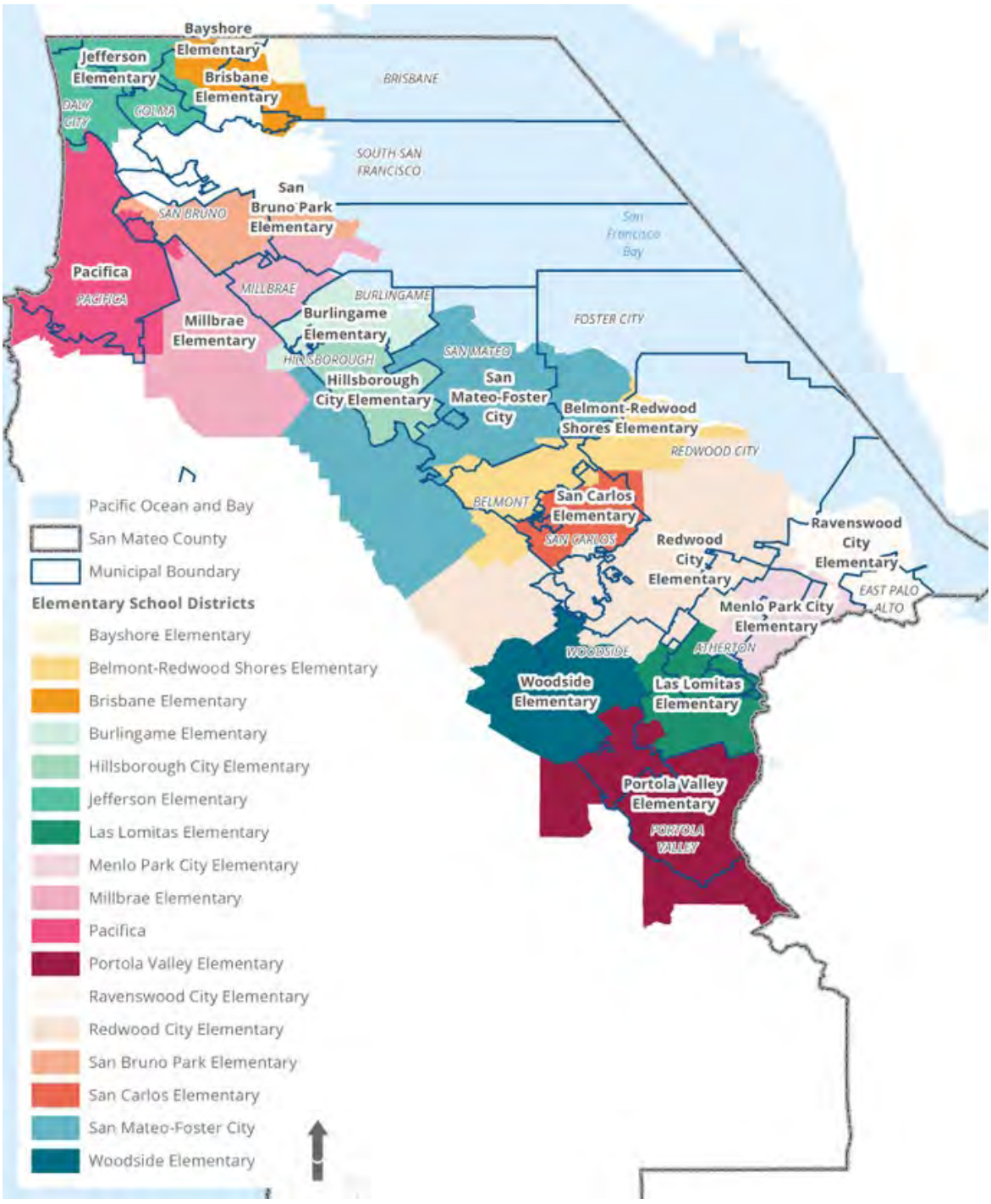
As illustrated in the map, Cabrillo Unified School District covers Half Moon Bay and some unincorporated areas of San Mateo County. South San Francisco Unified covers South San

Francisco and a small portion of Daly City. La Honda-Pescadero Unified School District covers unincorporated areas of San Mateo County.

The other high school districts, Jefferson Union, San Mateo Union, and Sequoia Union, cover the remaining jurisdictions. Jefferson Union covers Brisbane, Colma, Daly City, and Pacifica. San Mateo Union covers Burlingame, Hillsborough, Millbrae, San Bruno, San Mateo City, and Foster City. Sequoia Union covers Atherton, Belmont, Redwood City, East Palo Alto, Menlo Park, San Carlos, Portola Valley, and Woodside.

The county's elementary school districts cover the same areas as the three high school districts. Their geographic boundaries are illustrated in the map below.

Figure V-2.
Elementary School Districts in San Mateo County



Source: San Mateo County Office of Education.

Because the elementary school districts are much smaller, many jurisdictions have several elementary schools. The table blow shows each jurisdiction and their associated elementary school.

Figure V-3.
School Districts in San Mateo County's Jurisdictions

Jurisdiction	Unified or High School District	Elementary School District(s)
Atherton	Sequoia Union	Menlo Park City ; Las Lomitas Elementary; Redwood City
Belmont	Sequoia Union	Belmont-Redwood Shores
Brisbane	Jefferson Union	Brisbane; Bayshore Elementary
Burlingame	San Mateo Union	Burlingame
Colma	Jefferson Union	Jefferson Elementary
Daly City	Jefferson Union; South San Francisco Unifie	Jefferson Elementary
East Palo Alto	Sequoia Union	Ravenswood City
Foster City	San Mateo Union	San Mateo-Foster City
Half Moon Bay	Cabrillo Unified	(none, included in Cabrillo Unified)
Hillsborough	San Mateo Union	Hillsborough City
Menlo Park	Sequoia Union	Menlo Park City; Las Lomitas Elementary; Ravenswood City
Millbrae	San Mateo Union	Millbrae
Pacifica	Jefferson Union	Pacifica
Portola Valley	Sequoia Union	Portola Valley
Redwood City	Sequoia Union	Redwood City
San Bruno	San Mateo Union	San Bruno Park
San Carlos	Sequoia Union	San Carlos; Redwood City
San Mateo	San Mateo Union	San Mateo-Foster City
South San Francisco	South San Francisco Unified	(none, included in South San Francisco Unified)
Woodside	Sequoia Union	Woodside Elementary; Portola Valley; Las Lomitas; Redwood City

Source: San Mateo County Office of Education.

A brief history of district formation. San Mateo County's numerous school districts were formed over a century ago, when the county was more rural and scattered: communities needed elementary schools close to home, and only a few students were attending high school. As young people began going to high school, individual districts often found they had too few students and resources to support their own high schools, so

separate high school districts, covering the territories of two or more elementary districts, were established to meet the communities' needs.[2]

Once California's population grew and San Mateo County became more urbanized, "a jigsaw puzzle of overlapping districts evolved haphazardly." Since 1920, the state has been pushing elementary districts to unify with the high school districts that serve their communities, citing improved educational quality and equity of opportunity. However, there has been limited success and local voters in San Mateo County have consistently resisted unification.[3]

Early efforts at unification were more successful in the rural communities along the coast—for example, voters approved the new Cabrillo Unified district for the area around Half Moon Bay and the La Honda-Pescadero Unified district in a 1964 election. Unification was not supported by many suburban communities edging the Bay. The county's school district committee proposed to split each of the three high school districts and feeder schools into two or three smaller unified districts, but the State Board of Education rejected variations of those plans three times. The Board argued that the county committee's proposals would create districts with widely varying property tax bases and could contribute to racial segregation. The State Board instead devised a plan that would create a single unified district within each of the existing high school district boundaries. Voters turned down the state plans in all three districts in June 1966, and rejected a similar proposal again in 1972. In 1973, the Mid-Peninsula Task Force for Integrated Education petitioned the county committees to unify the elementary districts of Menlo Park, Las Lomitas, Portola Valley, Ravenswood and a portion of Sequoia Union High School District across county lines with Palo Alto Unified. Their goal was racial integration, but the county committee did not support the effort.[4]

Efforts against unification have persisted, leaving the county with several elementary school districts which feed into a high school, rather than a unified district. As a result, some elementary school districts have faced waning budgets and administrative hurtles. For instance, Brisbane and Bayshore elementary school districts, at the northern end of the county, serve a little more than 1,000 students and long have struggled with tight budgets. To rectify their budgetary concerns, the districts now share both a superintendent and a chief business officer. They also participate in a special education collaborative with the Jefferson elementary and high school districts.

According to the county's superintendent of schools Anne Campbell, other districts may find themselves pooling their resources in the future: local identification may be strong,

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[2] Watson, Aleta. "How Did We End Up With 54 School Districts in San Mateo and Santa Clara Counties?" Silicon Valley Community Foundation, 2012. https://www.siliconvalleycf.org/sites/default/files/report-edu.pdf

[3] Ibid.

[4] Ibid.

she says, but financial reality is hard to ignore: "As we move forward in time, I think it's going to be interesting to see what school districts are going to do, especially as budgets get more bleak."[5]

Enrollment changes. Total public school enrollment in the county has decreased slightly, by just 1%, from the 2010-2011 academic year to 2020-2021. Figure V-4 illustrates enrollment changes by district.

Bayshore Elementary, Ravenswood City, and Portola Valley school districts experienced the largest enrollment decreases (by at least 30%) between 2010-11 and 2020-21. School districts with the largest increases in enrollments were Burlingame (22%) and Belmont-Redwood Shores (30%).

[5] Ibid.

Figure V-4.
Enrollment changes by district, 2010-11 to 2020-2021

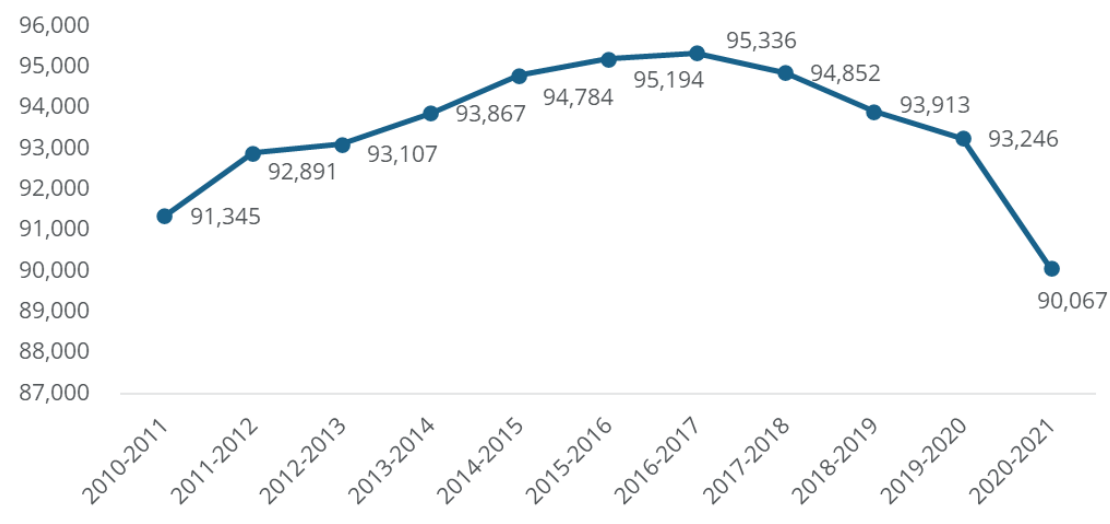
School District	2010-2011 Enrollment	2020-2021 Enrollment	Percent Change
Unified School Districts			
Cabrillo Unified	3,352	2,934	-12%
La Honda-Pescadero	341	275	-19%
South San Francisco	9,312	8,182	-12%
High & Elementary School Districts			
Jefferson Union High School	4,960	4,705	-5%
Bayshore Elementary	543	361	-34%
Brisbane Elementary	545	474	-13%
Jefferson Elementary	6,998	6,653	-5%
Pacifica	3,164	3,006	-5%
San Mateo Union High School	8,406	9,760	16%
Burlingame Elementary	2,771	3,387	22%
Hillsborough City Elementary	1,512	1,268	-16%
Millbrae Elementary	2,222	2,238	1%
San Bruno Park Elementary	2,599	2,275	-12%
San Mateo-Foster City	10,904	10,969	1%
Sequoia Union High School	8,765	10,327	18%
Belmont-Redwood Shores	3,206	4,152	30%
Las Lomitas Elementary	1,336	1,116	-16%
Menlo Park City Elementary	2,629	2,781	6%
Portola Valley Elementary	711	491	-31%
Ravenswood City Elementary	4,285	2,993	-30%
Redwood City Elementary	9,119	8,086	-11%
San Carlos Elementary	3,212	3,265	2%
Woodside Elementary	453	369	-19%
Total Enrollment	91,345	90,067	-1%

Source: California Department of Education and Root Policy Research

However, it is important to note that many of these enrollment decreases were driven by the pandemic. In fact, total enrollment in these public schools decreased by 3% between

2019-2020 and 2020-2021 in San Mateo County: the largest decrease of the decade. As shown in Figure V-5, enrollments actually increased steadily from 2010-2011 to 2017-2018, then began decreasing afterwards.

Figure V-5.
Public School Enrollment Changes, 2010-2011 to 2020-2021



Note: These data exclude enrollments in SBE Everest Public High School District, which in 2015 combined with the Sequoia Union High School District.

Source: California Department of Education and Root Policy Research

Portola Valley and La Honda-Pescadero school districts had the largest enrollment decreases during COVID-19, with a 11% and 10% decline in enrollments, respectively. The only school district with increasing enrollments between the 2019-2020 to 2020-2021 school years was Sequoia Union High School District, with a modest 1% increase in enrollments.

Figure V-6.
Enrollment changes by district during COVID-19, 2019-20 to 2020-21

School District	2019-2020 Enrollment	2020-2021 Enrollment	Percent Change
Unified School Districts			
Cabrillo Unified	3,136	2,934	-6%
La Honda-Pescadero	306	275	-10%
South San Francisco	8,438	8,182	-3%
High & Elementary School Districts			
Jefferson Union High School	4,811	4,705	-2%
Bayshore Elementary	381	361	-5%
Brisbane Elementary	476	474	0%
Jefferson Elementary	6,687	6,653	-1%
Pacifica	3,110	3,006	-3%
San Mateo Union High School	9,885	9,760	-1%
Burlingame Elementary	3,534	3,387	-4%
Hillsborough City Elementary	1,290	1,268	-2%
Millbrae Elementary	2,349	2,238	-5%
San Bruno Park Elementary	2,454	2,275	-7%
San Mateo-Foster City	11,576	10,969	-5%
Sequoia Union High School	10,238	10,327	1%
Belmont-Redwood Shores	4,314	4,152	-4%
Las Lomitas Elementary	1,208	1,116	-8%
Menlo Park City Elementary	2,922	2,781	-5%
Portola Valley Elementary	551	491	-11%
Ravenswood City Elementary	3,269	2,993	-8%
Redwood City Elementary	8,530	8,086	-5%
San Carlos Elementary	3,405	3,265	-4%
Woodside Elementary	376	369	-2%
Total Enrollment	93,246	90,067	-3%

Source: California Department of Education and Root Policy Research.

Declining enrollments in public schools have been common across the state and country during the COVID-19 pandemic, and enrollment declines in San Mateo County are on par

with those across the state. According to a study conducted by the Public Policy Institute of California, public K–12 enrollment declined by 3% in California from the 2019-2020 school year to the 2020-2021 school year. [6]

As funding is tied directly to the number of enrolled pupils, schools in San Mateo County could suffer fiscal consequences with continued declines. By law, districts are "held harmless" for declines for one year—that is, school budgets for 2020–2021 were unaffected, but continued enrollment declines could mean cuts in future years.[7] Reductions in enrollments, and consequently funding, could also worsen economic inequality in the long-term by reducing students' resources and access to opportunities.

Demographics: race & ethnicity. Over the last decade, San Mateo County's school districts have diversified in terms of students' race and ethnicity. Hispanic students make up the largest ethnic group in the county's schools: 38% of students identified as Hispanic in the 2020-2021 academic school year. This is just a one percentage point increase from 2010-2011. Many other students are White (26%), though this has decreased by 3 percentage points since 2010-2011, The largest increase was in Asian students, with 17% identifying as such in 2020-2021, an increase of 5 percentage points from 2010-2011. Other students identify as Filipino (8%), or bi- or multi-racial (8%). A small and decreasing percentage of students identify as Black/African American (1%) and Pacific Islander (2%).

[6] Lafortune, Julien & Prunty, Emmanuel. "Digging into Enrollment Drops at California Public Schools." Public Policy Institute of California. May 14, 2021. https://www.ppic.org/blog/digging-into-enrollment-drops-at-california-public-schools/

[7] Ibid.

Figure V-7.
Changes in Race and Ethnicity, 2010-2011 to 2020-2021

Note: These data exclude enrollments in SBE Everest Public High School District, which in 2015 combined with the Sequoia Union High School District.

Source: California Department of Education and Root Policy Research

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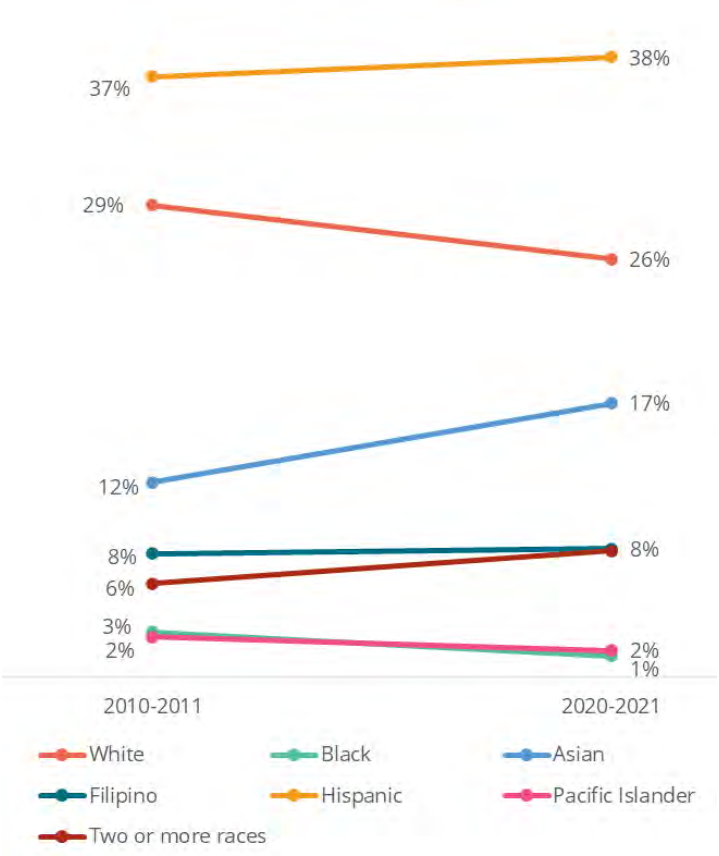


Figure V-8 shows the racial and ethnic distribution of students enrolled in public schools by jurisdiction in 2020-2021.

- Portola Valley Elementary School District (66%) and Woodside Elementary School District (64%) had the highest share of White students, making them among the least racially and ethnically diverse districts in the county.
- Ravenswood City Elementary School District and Redwood City Elementary School District had the highest share of Hispanic students, at 84% and 70%, respectively.
- Ravenswood City also had the highest proportion of Pacific Islander students (7%) and Black/African American students (5%) compared to other districts.
- Millbrae Elementary (46%), Hillsborough Elementary (32%), and Belmont-Redwood Shores Elementary (32%) had the highest share of Asian students.
- Jefferson Elementary School District and Jefferson Union High School District had the highest portion of Filipino students, at 25% and 29% respectively.

Figure V-8.
Student body by Race and Ethnicity, 2020-2021

School District	Asian	Black	Filipino	Hispanic	Pacific Islander	White	Two or more races
Unified School Districts							
Cabrillo Unified	1%	0%	1%	52%	0%	40%	5%
La Honda-Pescadero	0%	0%	1%	63%	0%	35%	1%
South San Francisco	14%	1%	23%	48%	2%	6%	6%
High & Elementary School Districts							
Jefferson Union High School	15%	1%	29%	31%	1%	14%	7%
Bayshore Elementary	19%	3%	21%	41%	4%	3%	8%
Brisbane Elementary	20%	1%	12%	28%	0%	24%	11%
Jefferson Elementary	19%	2%	25%	36%	1%	11%	5%
Pacifica	8%	1%	9%	26%	0%	39%	16%
San Mateo Union High School	23%	1%	5%	32%	2%	28%	10%
Burlingame Elementary	27%	0%	3%	16%	0%	41%	9%
Hillsborough Elementary	32%	0%	2%	5%	0%	48%	12%
Millbrae Elementary	46%	1%	6%	20%	2%	16%	8%
San Bruno Park Elementary	16%	1%	10%	41%	5%	15%	1%
San Mateo-Foster City	26%	1%	3%	37%	2%	21%	9%
Sequoia Union High School	9%	2%	1%	45%	2%	35%	5%
Belmont-Redwood Shores	32%	1%	3%	12%	1%	34%	14%
Las Lomitas Elementary	18%	1%	1%	13%	0%	53%	14%
Menlo Park City Elementary	13%	1%	1%	17%	1%	55%	11%
Portola Valley Elementary	6%	0%	0%	14%	0%	66%	13%
Ravenswood City Elementary	0%	5%	0%	84%	7%	1%	2%
Redwood City Elementary	4%	1%	1%	70%	1%	19%	4%
San Carlos Elementary	18%	1%	1%	14%	0%	49%	13%
Woodside Elementary	4%	2%	0%	16%	1%	64%	11%
Total	17%	1%	8%	38%	2%	26%	8%

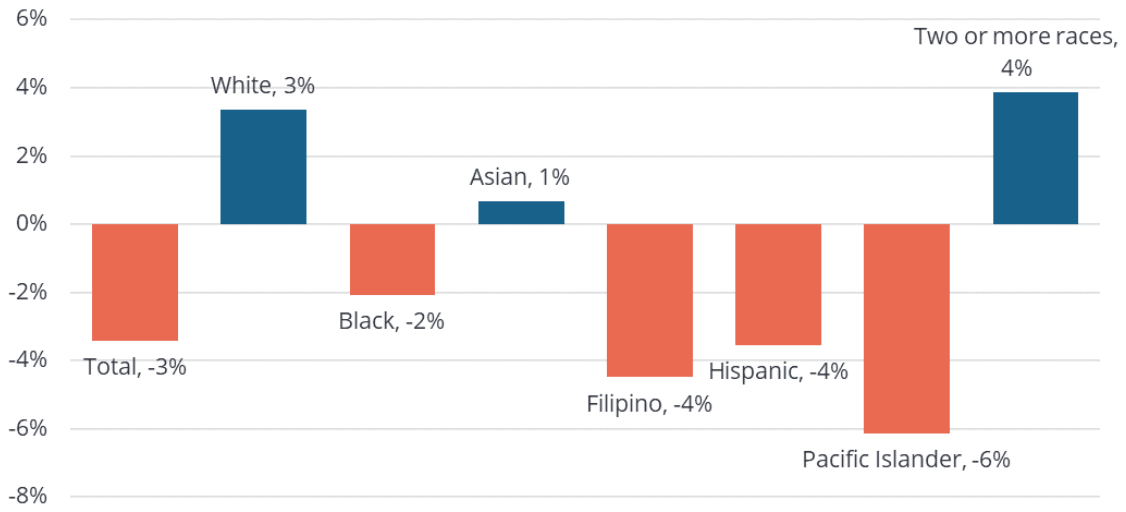
Note: In almost all school districts, less than 1% of students were Native American, so they are not included in this table.

Source: California Department of Education and Root Policy Research

Enrollment changes due to COVID-19 varied by race and ethnicity. For instance, between 2019-2021, enrollment among Pacific Islander students decreased by 6% (from 1,581 students in 2019-20 to 1,484 students in 2020-21). This is substantially higher than the 3% countywide average. Enrollments among Filipino and Hispanic students decreased by 4% while enrollment among Black/African American students decreased by 2%. On the other

end of the spectrum, there was a 3% increase in enrollment among White students (from 22,308 students to 23,055 students) between 2019-20 and 2020-21. Similarly, there was a 1% increase in enrollment among Asian students and a 4% increase among students of two or more races.

Figure V-9.
Enrollment Changes by Race and Ethnicity, San Mateo County, 2019-20 to 2020-21



Source: California Department of Education and Root Policy Research

While many of their families may have simply moved out of San Mateo County during the pandemic, it is possible that Black/African American, Filipino, Hispanic, and Pacific Islander students are otherwise slipping through the cracks of the education system during this period.

Demographics: students with extenuating circumstances. Several students in the county's public schools are facing additional hurtles to educational ease. Many are English learners, qualify for reduced lunch, are foster children, are experiencing homelessness, have a disability, or are migrants. Students in these groups often have hindrances to excelling in school because of detrimental circumstances beyond their control. These include financial and social hardships as well as problems within students' families.

Qualification for free and reduced lunch is often used as a proxy for extenuating circumstances. Qualifications are determined based on household size and income. For instance, in the 2020-2021 academic year, students from a household of three making less

than $40,182 annually qualified for reduced price meals, and those making less than $28,236 in a household of three qualified for free meals.[8]

Free and reduced lunch disparities. Overall, 29% of public school students in San Mateo County qualify for reduced or free lunch. This rate was substantially lower in districts like Hillsborough Elementary, San Carlos Elementary, Portola Valley Elementary, Las Lomitas Elementary, Belmont-Redwood Shores, and Menlo Park City Elementary, where each had less than 10% of students qualify for free or reduced lunch.

The rate of reduced lunch qualification was far higher in Ravenswood City Elementary School District, where 83% of students qualify for reduced lunch.

Disparities in homelessness. In Ravenswood City Elementary, 30% of students are experiencing homelessness. This is an outlier in the county, where overall just 2% are experiencing homelessness. The school district has received media attention due to its astronomically high rate of students experiencing homelessness. Some have noted that rates of homelessness have increased due to escalating costs of living in an area surrounded by affluence.[9] Others have highlighted that ”Having a roof over your head, having a safe place to sleep and study, is fundamental to absolutely everything," and have noted that students who experience homelessness have higher dropout rates and are more likely to experience homelessness as adults.[10]

School moves related to evictions. Currently, students whose families have been evicted do not have protections allowing them to remain in their current school district. This means that precarious housing also means precarious schooling for many of the county’s students. Frequent moves by students are closely related to lower educational proficiency.

In the City of San Francisco, a 2010 ordinance protects some students from being evicted during the school year; however, it only relates to owner/relative move-in evictions.[11] Children in families who are evicted for other reasons may need to move schools or districts when their housing is lost.

English language learners. Countywide, 20% of public school students are English learners. Again, this rate is highest at Ravenswood City Elementary, where 53% of students are English learners. La Honda-Pescadero Unified School District, Jefferson Union High

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[8] “Income Eligibility Scales for School Year 2020-2021.” California Department of Education.

[9] Bartley, Kaitlyn. “Homelessness: The shadow that hangs over students in this Bay Area school district.” The Mercury News. December 2018.

[10] Jones, Carolyn. “California schools see big jump in homeless students.” Palo Alto Online. October 2020.

[11] https://sfrb.org/new-amendment-prohibiting-owner-move-evictions-minor-children-during-school-year

School, and Redwood City Elementary also have high rates of English learners, representing more than a third of students.

Less than one percent of students in San Mateo County public school districts are foster youth or migrants. Cabrillo Unified School District had the highest rate of migrant students at 3%. La Honda-Pescadero had the highest rate of foster children at 2%.

School districts without large low income populations also tend to serve very few English language learners. For instance, in Hillsborough Elementary where 0% of students qualify for reduced lunch, only 1% of students are English language learners.

Figure V-10.
Students with Extenuating Circumstances, 2020-2021

School District	English Learners	Reduced Lunch	Foster Children	Homeless	Migrant
Unified School Districts					
Cabrillo Unified	20%	37%	0%	2%	3%
La Honda-Pescadero	38%	38%	2%	1%	1%
South San Francisco	21%	34%	0%	1%	1%
High & Elementary School Districts					
Jefferson Union High School	36%	44%	0%	0%	0%
Bayshore Elementary	30%	57%	0%	0%	0%
Brisbane Elementary	16%	19%	0%	0%	0%
Jefferson Elementary	14%	27%	0%	1%	0%
Pacifica	9%	18%	0%	1%	0%
San Mateo Union High School	10%	21%	0%	0%	0%
Burlingame Elementary	13%	11%	0%	0%	0%
Hillsborough Elementary	1%	0%	0%	0%	0%
Millbrae Elementary	19%	25%	0%	0%	0%
San Bruno Park Elementary	29%	18%	0%	0%	0%
San Mateo-Foster City	26%	28%	0%	2%	0%
Sequoia Union High School	15%	30%	0%	0%	0%
Belmont-Redwood Shores	10%	7%	0%	0%	0%
Las Lomitas Elementary	7%	6%	0%	0%	0%
Menlo Park City Elementary	6%	7%	0%	0%	0%
Portola Valley Elementary	4%	5%	0%	0%	0%
Ravenswood City Elementary	53%	83%	0%	30%	0%
Redwood City Elementary	38%	56%	0%	2%	1%
San Carlos Elementary	5%	6%	0%	0%	0%
Woodside Elementary	8%	10%	0%	0%	0%
Total	20%	29%	<1%	2%	<1%

Source: California Department of Education and Root Policy Research

The overall share of students in these groups has not changed drastically over time. As shown in Figure V-11, there have been slight decreases in the share of students who are English learners and the share of students who qualify for reduced lunch from 2016-2017

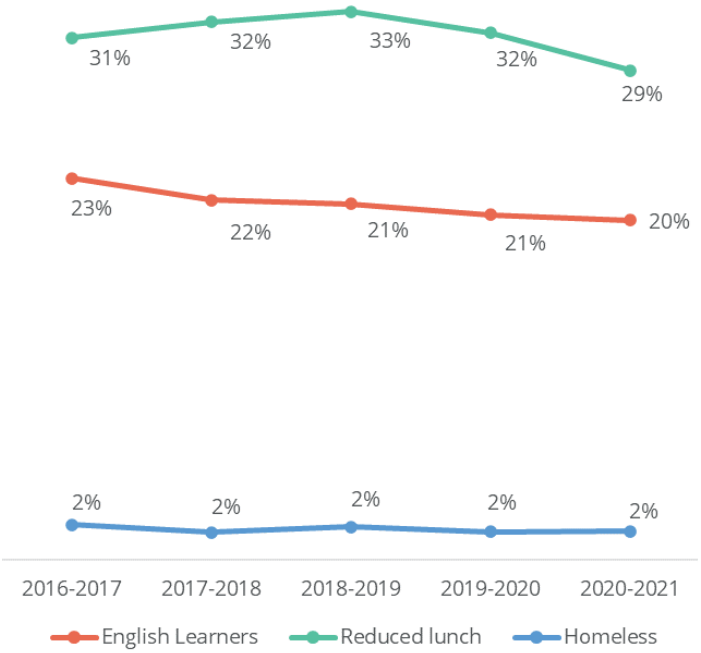
to 2020-2021. Around 2% of students in the county are homeless and this has not changed between 2016-2017 and 2020-2021. Foster youth and migrant students are not shown in the figure, as both have hovered at less than 1% from year to year.

Figure V-11.
Changes in rates of English Leaners, Reduced Lunch, and Homelessness, 2016-2017 to 2020-2021

Note: These data exclude enrollments in SBE Everest Public High School District, which in 2015 combined with the Sequoia Union High School District.

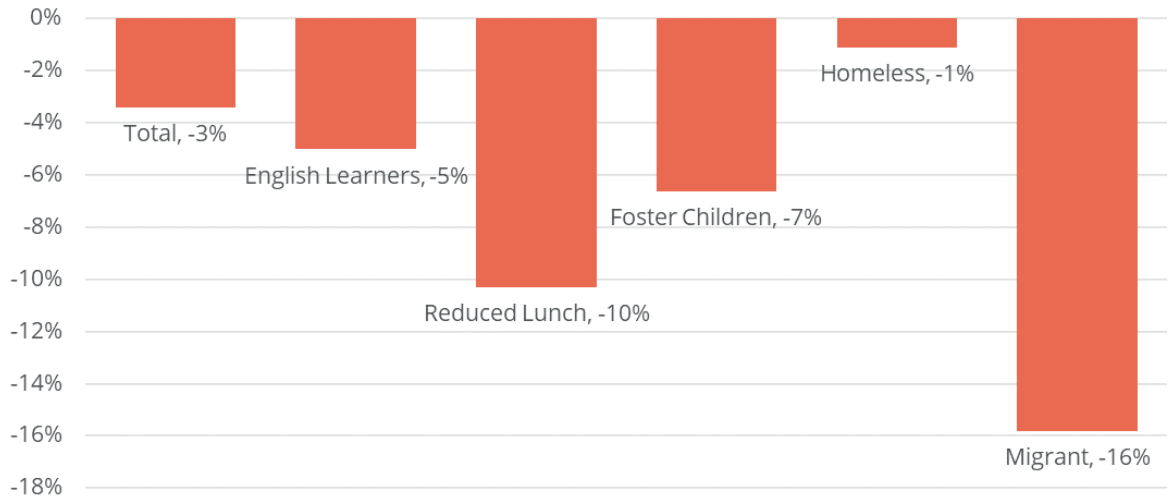
Source: California Department of Education and Root Policy Research

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During COVID-19, enrollments decreased by 3% between 2019-2020 and 2020-2021 school years, as families withdrew or did not reenroll their children from public schools. Enrollment among migrant students decreased much more drastically, by 16% (from 332 students to 279 students). Similarly, enrollment among students who qualify for reduced lunch declined at a higher rate (10%) than the overall student population. Foster children and English learners also experienced enrollment decreases at a rate higher than the total population, with 7% and 10% decreases in enrollment, respectively.

Figure V-12.
Enrollment Changes by Extenuating Circumstance, San Mateo County, 2019-2020 to 2020-2021



Source: California Department of Education and Root Policy Research

Achievement Gaps

This section details achievement gaps within school districts. Gaps are measured by test scores, meeting California State University or University of California admissions standards, and college-going rates.

Test scores. Figure V-13 indicates the percent of students who met or exceeded English and mathematics testing standards set by the California State Assessment of Student Performance and Progress. Overall, 62% of students in the county met or exceeded English testing standards and 52% met or exceeded mathematics testing standards.

Of all the districts with high schools, San Mateo Union High School District had the highest student pass rates: 70% of their students met or exceeded standards in English testing and 50% met or exceeded standards in mathematics testing.

Among elementary school districts, Portola Valley Elementary School District and Woodside Elementary School District had the highest rates of success in English, with 87% and 88% of students meeting or exceeding English testing standards, respectively. Woodside Elementary School District and Hillsborough Elementary School District had the highest rates of success in mathematics, with 84% and 85% meeting math testing standards, respectively.

In every school district, girls scored higher on English tests than boys. Overall, girls met or exceeded English testing at a rate of 67% while boys met or exceeded English testing at a rate of 57%. The largest gender gap was in Brisbane Elementary School District, where 72%

of girls met or exceeded English testing standards and just 56% of boys did: a gap of 16 percentage points.

Gender gaps in mathematics were less pronounced, but largest gender gaps were in Cabrillo Unified School District and in La Honda Pescadero Unified School District. In Cabrillo Unified, girls passed mathematics at a rate 7% higher than boys, while in La Honda-Pescadero, boys passed at a rate 6% higher than girls.

Figure V-14.
Students who Met or Exceeded Testing Standards, by Gender and District, 2018-2019

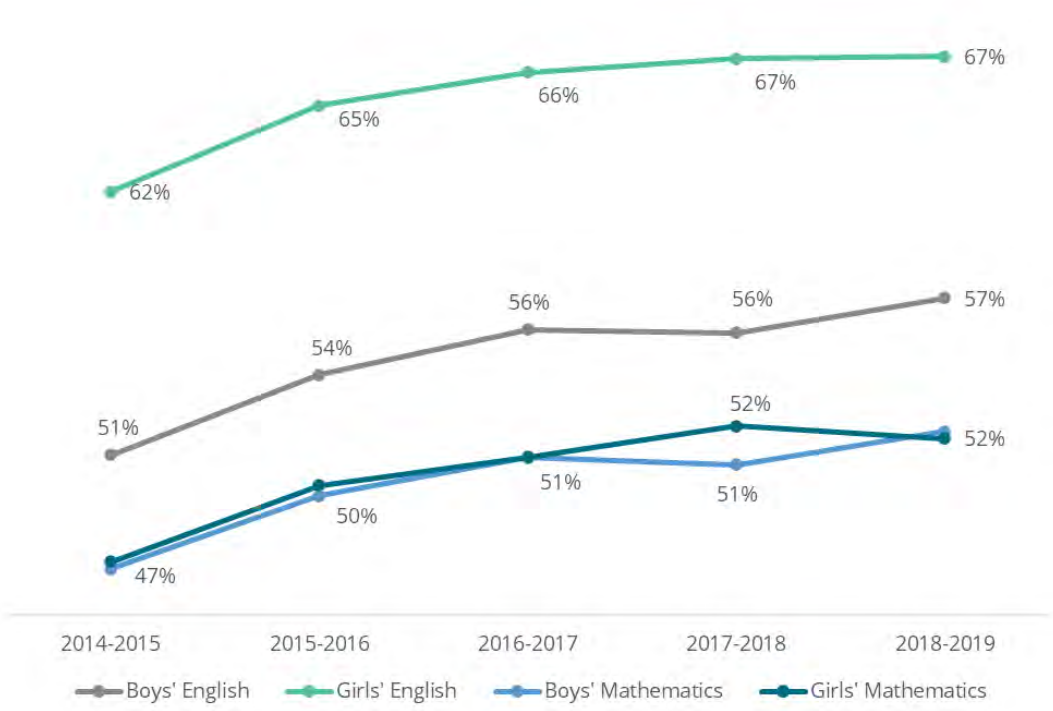
	English Language Arts/Literacy			Mathematics		
District	Total	Boys	Girls	Total	Boys	Girls
Unified School Districts						
Cabrillo Unified	48%	41%	55%	34%	31%	38%
La Honda-Pescadero	43%	36%	49%	31%	34%	28%
South San Francisco	52%	45%	60%	44%	42%	45%
High & Elementary School Districts						
Jefferson Union High School	57%	52%	63%	37%	38%	35%
Bayshore Elementary	27%	24%	31%	27%	27%	28%
Brisbane Elementary	64%	56%	72%	54%	56%	53%
Jefferson Elementary	48%	43%	54%	37%	39%	35%
Pacifica	60%	55%	65%	57%	57%	57%
San Mateo Union High School	70%	66%	76%	50%	50%	50%
Burlingame Elementary	80%	75%	84%	78%	78%	78%
Hillsborough Elementary	85%	81%	89%	85%	86%	84%
Millbrae Elementary	63%	57%	70%	58%	58%	58%
San Bruno Park Elementary	50%	47%	53%	41%	43%	38%
San Mateo-Foster City	62%	58%	67%	56%	56%	56%
Sequoia Union High School	68%	64%	72%	50%	50%	50%
Belmont-Redwood Shores	82%	78%	86%	79%	78%	80%
Las Lomitas Elementary	86%	84%	88%	82%	84%	80%
Menlo Park City Elementary	84%	81%	87%	83%	82%	83%
Portola Valley Elementary	87%	83%	91%	83%	84%	82%
Ravenswood City Elementary	22%	20%	23%	15%	16%	13%
Redwood City Elementary	54%	49%	59%	46%	46%	46%
San Carlos Elementary	80%	77%	83%	75%	76%	74%
Woodside Elementary	88%	85%	91%	84%	85%	83%
Total	62%	57%	67%	52%	52%	52%

Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

The gender gap in test scores has started to close in recent years, as indicated in Figure V-15. In 2014-2015 there was a 11 percentage point gap in girls' and boys' English testing pass

rates, and by 2018-2019 this was just a 10 percentage point gap. The figure also indicates that there have been steady gains in the share of students meeting or exceeding testing standards in the county.

Figure V-15.
Students who Met or Exceeded Testing Standards, by Gender, 2014-2015 to 2018-2019



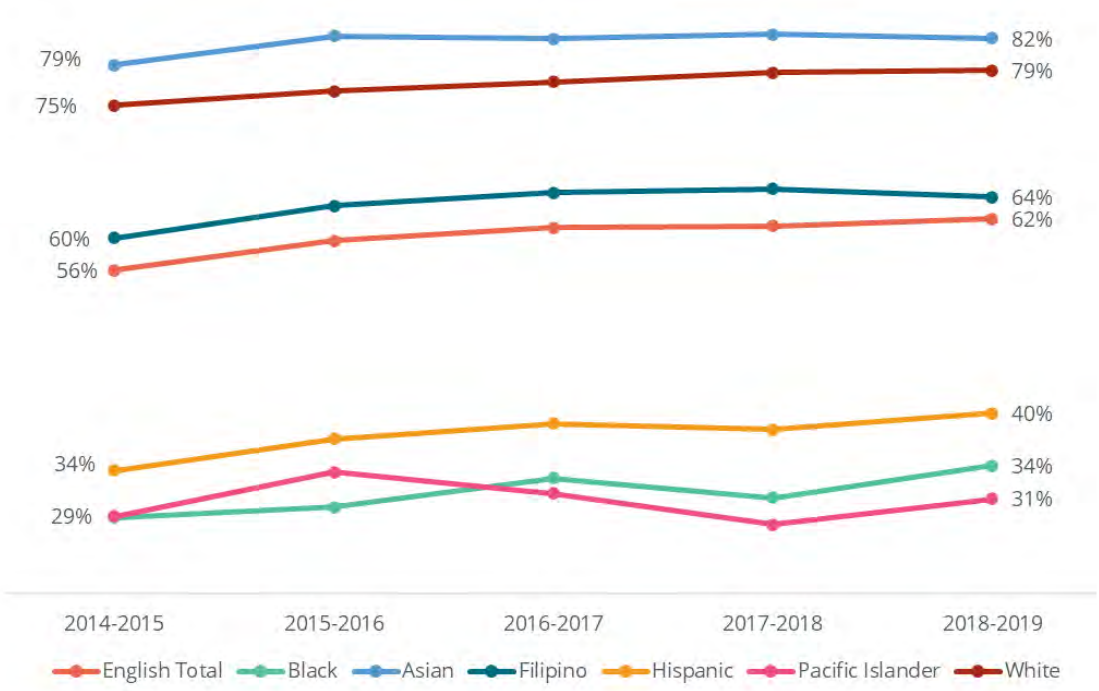
Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Very large gaps in test scores by race and ethnicity exist among students in some areas. Figure V-16 illustrates the rate at which students of various racial and ethnic groups met or exceeded English testing standards.

For the past five years in San Mateo County, Asian, White, and Filipino students have met or exceeded English testing standards at rates higher than the overall student population. Hispanic, Black/African American, and Pacific Islander students, on the other hand, have been underserved in this realm and have consistently scored lower than the overall student body.

However, across all groups, the rate at which students met or exceed English testing standards has increased since the 2014-2015 school year. Hispanic students have made the largest percentage point gain: 34% met standards in 2014-2015 and 40% met standards in 2019-19, an increase of six percentage points.

Figure V-16.
Students who Met or Exceeded English Testing Standards, by Race and Ethnicity, 2014-2015 to 2018-2019

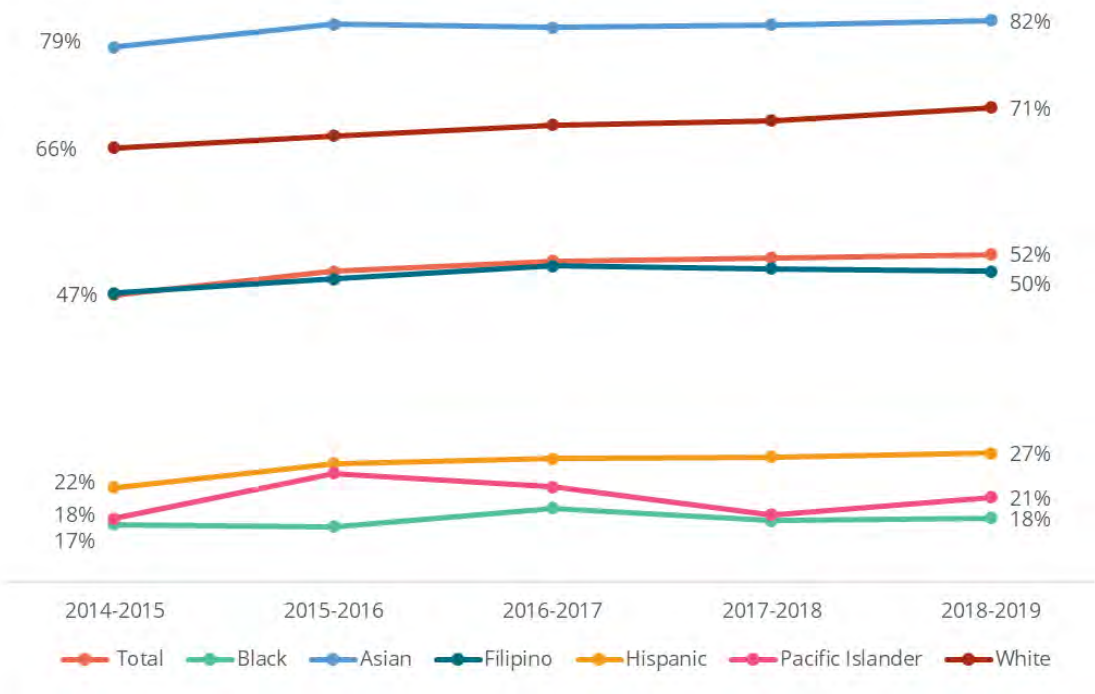


Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

A similar narrative holds in Math testing standards, where scores have improved among each racial and ethnic group from 2014-2015 to 2018-2019. Again, White and Asian students meet or exceed math testing standards at rates higher than the overall population while Hispanic, Pacific Islander, and Black/African American students scored lower.

White and Hispanic students have seen the biggest increases in rates of mathematics success: both have experienced a five percentage point increase in the percent of students who met or exceeded math testing standards.

Figure V-17.
Students who Met or Exceeded mathematics testing standards, by Race and Ethnicity, 2014-2015 to 2018-2019



Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Figure V-18 illustrates the rates at which students of various racial and ethnic groups met or exceeded mathematics testing standards by district.

There were several districts in which the gaps between the overall test pass rates and a specific racial groups' pass rates were especially wide. For instance, in San Carlos Elementary School District, 75% of the total student body met or exceeded math testing standards, but only 11% of Black/African American students met or exceeded math testing standards— a gap of 64 percentage points.

Other school districts with wide gaps between Black/African American and overall math testing success were Las Lomitas Elementary (46 percentage point gap), Menlo Park City Elementary (43 percentage point gap), and Belmont-Redwood Shores (42 percentage point gap).

Some school districts also had similar gaps in Pacific Islander students' math passing rates and overall passing rates. For instance, in Menlo Park City Elementary School District, 83% of the student body met or exceeded mathematics testing standards but just 35% of Pacific Islander students passed or exceeded mathematics testing standards—a gap of 48

percentage points. Millbrae Elementary School District also had a 47 percentage point gap between Pacific Islander students' and total students' math test rates.

Figure V-18.
Students who Met or Exceeded Mathematics Testing Standards, by Race/Ethnicity and District, 2018-2019

School District	Overall	Asian	Black	Filipino	Hispanic	Pacific Islander	White
Unified School Districts							
Cabrillo Unified	34%	65%	(no data)	38%	16%	(no data)	54%
La Honda-Pescadero	31%	(no data)	(no data)	(no data)	20%	(no data)	46%
South San Francisco	44%	75%	19%	60%	29%	33%	46%
High & Elementary School Districts							
Jefferson Union High School	37%	75%	(no data)	36%	17%	(no data)	42%
Bayshore Elementary	27%	44%	(no data)	38%	17%	14%	(no data)
Brisbane Elementary	54%	67%	(no data)	65%	38%	(no data)	60%
Jefferson Elementary	37%	61%	15%	42%	23%	20%	30%
Pacifica	57%	74%	38%	48%	38%	(no data)	66%
San Mateo Union High School	50%	84%	(no data)	46%	22%	20%	63%
Burlingame Elementary	78%	92%	53%	66%	50%	(no data)	81%
Hillsborough Elementary	85%	92%	(no data)	(no data)	76%	(no data)	82%
Millbrae Elementary	58%	75%	31%	63%	27%	11%	51%
San Bruno Park Elementary	41%	69%	23%	64%	25%	27%	50%
San Mateo-Foster City	56%	87%	30%	61%	23%	27%	69%
Sequoia Union High School	50%	81%	18%	53%	22%	11%	76%
Belmont-Redwood Shores	79%	92%	37%	77%	52%	43%	79%
Las Lomitas Elementary	82%	93%	36%	(no data)	44%	(no data)	87%
Menlo Park City Elementary	83%	94%	40%	(no data)	55%	35%	88%
Portola Valley Elementary	83%	89%	(no data)	(no data)	56%	(no data)	89%
Ravenswood City Elementary	15%	(no data)	9%	(no data)	15%	11%	(no data)
Redwood City Elementary	46%	92%	22%	76%	34%	44%	75%
San Carlos Elementary	75%	91%	11%	85%	51%	(no data)	78%
Woodside Elementary	84%	92%	(no data)	(no data)	52%	(no data)	89%
Total	52%	82%	18%	50%	27%	21%	71%

Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Although racial gaps in English testing were less pronounced, San Carlos Elementary School District also had a wide gap between the total student body and Black/African American

students. Namely, 80% of the student body met or exceeded English testing standards, but only 19% of Black/African American students met or exceeded testing standards—a 61 percentage point gap. Las Lomitas Elementary had a 41 percentage point gap between overall English testing success and Black/African American English testing success.

Other districts had large gaps between the total student body's English test scores and Pacific Islander students' test scores. Namely, in Menlo Park City Elementary School District 84% of students met or exceeded English testing standards, but only 40% of Pacific Islander students—a 44 percentage point gap.

Figure V-19.
Students who Met or Exceeded English Testing Standards, by Race/Ethnicity and District, 2018-2019

School District	Overall	Asian	Black	Filipino	Hispanic	Pacific Islander	White
Unified School Districts							
Cabrillo Unified	48%	78%	(no data)	54%	28%	(no data)	71%
La Honda-Pescadero	43%	(no data)	(no data)	(no data)	27%	(no data)	61%
South San Francisco	52%	76%	36%	66%	38%	44%	56%
High & Elementary School Districts							
Jefferson Union High School	57%	81%	(no data)	60%	43%	(no data)	59%
Bayshore Elementary	27%	49%	(no data)	33%	20%	14%	(no data)
Brisbane Elementary	64%	63%	(no data)	75%	51%	(no data)	79%
Jefferson Elementary	48%	62%	28%	59%	34%	33%	43%
Pacifica	60%	65%	32%	52%	45%	(no data)	68%
San Mateo Union High School	70%	88%	55%	79%	50%	34%	81%
Burlingame Elementary	80%	88%	61%	73%	55%	(no data)	83%
Hillsborough Elementary	85%	89%	(no data)	(no data)	77%	(no data)	83%
Millbrae Elementary	63%	74%	46%	68%	42%	23%	61%
San Bruno Park Elementary	50%	72%	39%	76%	36%	31%	56%
San Mateo-Foster City	62%	85%	41%	68%	34%	37%	77%
Sequoia Union High School	68%	87%	44%	92%	47%	31%	88%
Belmont-Redwood Shores	82%	91%	44%	81%	64%	61%	83%
Las Lomitas Elementary	86%	91%	45%	(no data)	65%	(no data)	89%
Menlo Park City Elementary	84%	92%	60%	(no data)	62%	40%	88%
Portola Valley Elementary	87%	92%	(no data)	(no data)	58%	(no data)	93%
Ravenswood City Elementary	22%	(no data)	24%	(no data)	21%	18%	(no data)
Redwood City Elementary	54%	91%	35%	73%	43%	47%	83%
San Carlos Elementary	80%	90%	19%	76%	60%	(no data)	83%
Woodside Elementary	88%	92%	(no data)	(no data)	58%	(no data)	92%
Total	62%	82%	34%	64%	40%	31%	79%

Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Students with extenuating circumstances across all districts met or exceeded testing standards at lower rates. However, some districts had especially wide disparities between overall test scores and test scores of students with extenuating circumstances.

For example, English learning students in Portola Valley Elementary, Woodside Elementary, Menlo Park City Elementary, and Brisbane Elementary each met or exceeded mathematics test standards at a rate at least 50 percentage points below the overall test rate in each district. English learning students in Las Lomitas Elementary (54%) had the highest mathematics pass rates, followed by those in Belmont-Redwood Shores (42%) and Burlingame Elementary (40%).

Students with disabilities scored especially high on mathematics tests in Hillsborough Elementary, where 48% met or exceeded standards. Others in Belmont-Redwood Shores (43%) and Woodside Elementary (41%) had high pass rates as well. Students with disabilities in San Carlos Elementary and Las Lomitas Elementary school districts scored far below the overall student body: in these districts, students with disabilities met or exceeded mathematics test standards at 54 percentage points below the overall test rate.

In Jefferson Elementary and Ravenswood Elementary students experiencing homelessness passed math tests at a rate similar to their housed peers. In other districts, however, students experiencing homelessness often scored substantially lower. School districts with the widest math testing gaps between the overall student body and students experiencing homelessness were San Mateo-Foster City and Millbrae Elementary, with a 41 percentage point gap and 42 percentage point gap, respectively.

Figure V-20.
Students who Met or Exceeded Math Testing Standards, by Special Case and District, 2018-2019

School District	Overall	English Learners	Experiencing homelessness	Migrant	With Disabilities
Unified School Districts					
Cabrillo Unified	34%	4%	5%	4%	9%
La Honda-Pescadero	31%	4%	(no data)	(no data)	2%
South San Francisco	44%	20%	25%	4%	18%
High & Elementary School Districts					
Jefferson Union High School	37%	5%	(no data)	(no data)	6%
Bayshore Elementary	27%	11%	(no data)	(no data)	9%
Brisbane Elementary	54%	4%	(no data)	(no data)	12%
Jefferson Elementary	37%	15%	36%	(no data)	11%
Pacifica	57%	22%	(no data)	(no data)	17%
San Mateo Union High School	50%	10%	(no data)	(no data)	13%
Burlingame Elementary	78%	40%	(no data)	(no data)	29%
Hillsborough Elementary	85%	(no data)	(no data)	(no data)	48%
Millbrae Elementary	58%	26%	16%	(no data)	25%
San Bruno Park Elementary	41%	12%	(no data)	(no data)	9%
San Mateo-Foster City	56%	11%	15%	(no data)	14%
Sequoia Union High School	50%	3%	33%	(no data)	9%
Belmont-Redwood Shores	79%	42%	(no data)	(no data)	43%
Las Lomitas Elementary	82%	54%	(no data)	(no data)	28%
Menlo Park City Elementary	83%	31%	(no data)	(no data)	38%
Portola Valley Elementary	83%	14%	(no data)	(no data)	39%
Ravenswood City Elementary	15%	5%	11%	(no data)	2%
Redwood City Elementary	46%	14%	(no data)	29%	14%
San Carlos Elementary	75%	24%	(no data)	(no data)	21%
Woodside Elementary	84%	27%	(no data)	(no data)	41%

Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Students with extenuating circumstances also consistently scored lower in English testing than the overall student body.

For instance, English learning students in San Mateo Union High School District, Hillsborough Elementary School District, Sequoia Union High School District, Menlo Park City Elementary School District, and Portola Valley Elementary School District met or exceeded English test standards at a rate at least 60 percentage points below the overall test rate in each district. Hillsborough Elementary had the largest gap at 85 percentage points. Las Lomitas Elementary had the highest success rate among English learners, where 50% met or exceeded English testing standards.

However, students with disabilities in Las Lomitas Elementary and San Carlos Elementary school districts met or exceeded English test standards at rate 55 and 51 percentage points below the overall test rate, respectively. These were the largest gaps in the county. Students with disabilities at Woodside Elementary did the best on English testing, where 56% passed or exceeded standards.

Among students experiencing homelessness, those at Sequoia Union High School were most likely to meet English testing standards, with 42% meeting or exceeding standards. The school district with the widest gap between overall English test scores and scores among students experiencing homelessness was Cabrillo Unified with a 34 percentage point gap.

Just three districts reported English testing scores among migrant students. Redwood City Elementary had the highest pass rate at 34% and Cabrillo Unified had the lowest at 16%.

Figure V-21.
Students who Met or Exceeded English Testing Standards, by Special Case and District, 2018-2019

School District	Overall	English Learners	Experiencing homelessness	Migrant	With Disabilities
Unified School Districts					
Cabrillo Unified	48%	9%	14%	16%	12%
La Honda-Pescadero	43%	9%	(no data)	(no data)	9%
South San Francisco	52%	21%	35%	20%	18%
High & Elementary School Districts					
Jefferson Union High School	57%	3%	(no data)	(no data)	19%
Bayshore Elementary	27%	3%	(no data)	(no data)	4%
Brisbane Elementary	64%	21%	(no data)	(no data)	16%
Jefferson Elementary	48%	16%	30%	(no data)	15%
Pacifica	60%	12%	(no data)	(no data)	15%
San Mateo Union High School	70%	11%	(no data)	(no data)	27%
Burlingame Elementary	80%	33%	(no data)	(no data)	33%
Hillsborough Elementary	85%	(no data)	(no data)	(no data)	47%
Millbrae Elementary	63%	19%	34%	(no data)	23%
San Bruno Park Elementary	50%	14%	(no data)	(no data)	12%
San Mateo-Foster City	62%	9%	33%	(no data)	15%
Sequoia Union High School	68%	8%	42%	(no data)	27%
Belmont-Redwood Shores	82%	31%	(no data)	(no data)	45%
Las Lomitas Elementary	86%	51%	(no data)	(no data)	31%
Menlo Park City Elementary	84%	21%	(no data)	(no data)	42%
Portola Valley Elementary	87%	17%	(no data)	(no data)	37%
Ravenswood City Elementary	22%	6%	16%	(no data)	5%
Redwood City Elementary	54%	13%	(no data)	34%	16%
San Carlos Elementary	80%	29%	(no data)	(no data)	28%
Woodside Elementary	88%	18%	(no data)	(no data)	56%

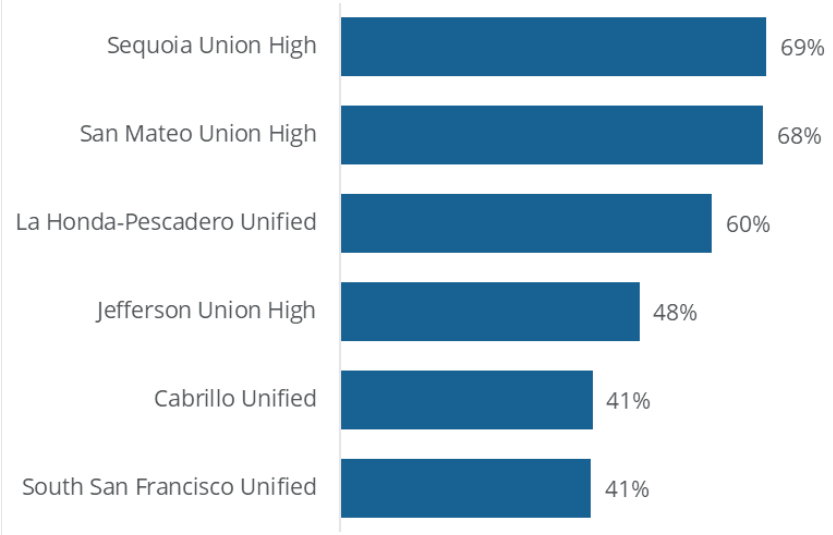
Source: California Department of Education, California Assessment of Student Performance and Progress, and Root Policy Research

Students who met university requirements. Many high schoolers in the county met admission standards for a University of California (UC) or California State University (CSU) school. Figure V-22 illustrates the percentage of cohort graduates who met admission requirements for a CSU or UC school according to California Department of Education data.

Of the high school districts in San Mateo County, Sequoia Union had the highest rate of graduates who met such admission standards, at 69%. On the other end of the spectrum, Cabrillo Unified and South San Francisco Unified had the lowest rates at 41%.

Figure V-22. Students Meeting California University Admission Standards, 2019-2020

Source:
California Department of Education and Root Policy Research.



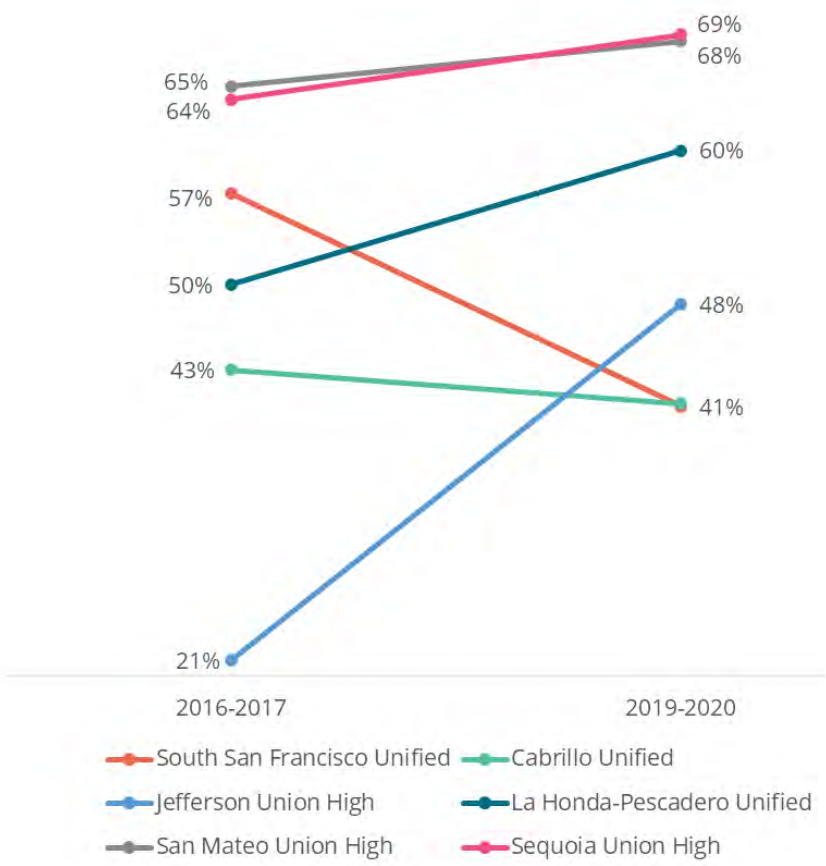
Cabrillo Unified and South San Francisco Unified have experienced a decrease in the share of graduates meeting CSU or UC admission standards in recent years. For instance, in 2016-2017, 57% of South San Francisco Unified graduates met these standards, but this decreased by 16 percentage points by 2019-2020. Cabrillo Unified experienced a less drastic decrease over the same period, but the rate still shrunk by two percentage points.

Jefferson Union High School District had the most drastic increase in the share of graduates meeting CSU or UC standards: just 21% of students met these standards in 2016-2017 compared to 48% of students in 2019-2020. La Honda-Pescadero Unified School District experienced a 10 percentage point increase in this success rate over the same period.

Sequoia Union and San Mateo Union experienced more modest increases, but remain the districts with the highest rates of students meeting CSU and UC standards.

Figure V-23. Students Meeting University Admission Standards, 2016-2017 and 2019-2020

Source:
California Department of Education and Root Policy Research.



Rates at which students met CSU or UC admissions standards varied substantially by race and ethnicity in 2019-2020. In all high school districts in San Mateo County, White and Asian students meet CSU and UC admissions standards at higher rates than the overall student population.

The largest gap is in South San Francisco Unified, where just 41% of students meet CSU or UC admissions standards, but 73% of Asian students meet those standards—a 32 percentage point gap.

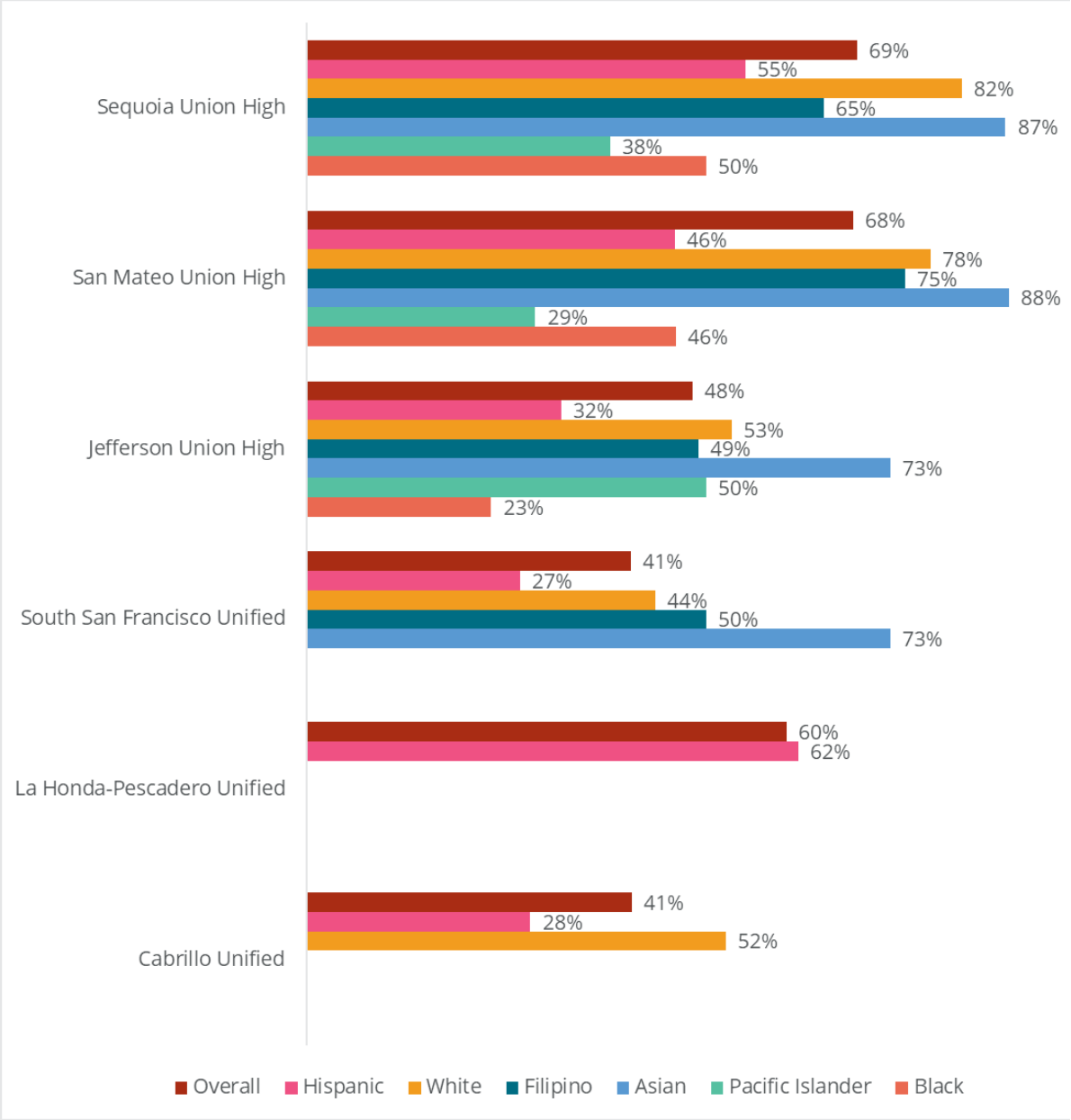
On the other end of the spectrum, Black/African American students typically met CSU or UC admissions standards at lower-than-average rates. The largest gap was in San Mateo Union, where just 29% of Black/African American students met CSU or UC standards compared to 68% of students in the district overall.

Filipino students typically met admissions standards at rates similar to the overall student body. For instance, in Jefferson Union, San Mateo Union, and South San Francisco Unified, Filipino students are slightly more likely to have meet CSU and UC standards than the overall student population. In Sequoia Union, they are slightly less likely to have met admission standards than the overall student population.

In La Honda-Pescadero, Hispanic students are slightly more likely to have met CSU or UC standards than the overall student body. However, in all other school districts, Hispanic students are less likely to have met CSU and UC standards than the overall student body. The largest disparity is in San Mateo Union, where just 46% of Hispanic students meet the university admissions standards compared to 68% of students overall.

Finally, Pacific Islander students in Jefferson Union were slightly more likely to have met California university admissions standards compared to the overall student body, but in Sequoia Union and San Mateo Union they were substantially less likely.

Figure V-24.
Students Meeting University Admission Standards, by Race and Ethnicity, 2019-2020



Source: California Department of Education and Root Policy Research

As expected, students with extenuating circumstances were less likely to meet CSU or UC admissions standards than students in the county overall. In all school districts where data are available, students with disabilities, students experiencing homelessness, English learners, foster youth, and migrant students met CSU or UC admission standards at lower rates than the overall student population.

English learners in Sequoia Union and San Mateo Regional met CSU or UC admission standards at higher rates than their peers in other school districts. However, compared to the overall student body within their own school districts, they had a larger gap than other districts. Namely, in Sequoia Union, 69% of students met admissions standards compared to just 32% of students learning English— a 37 percentage point gap.

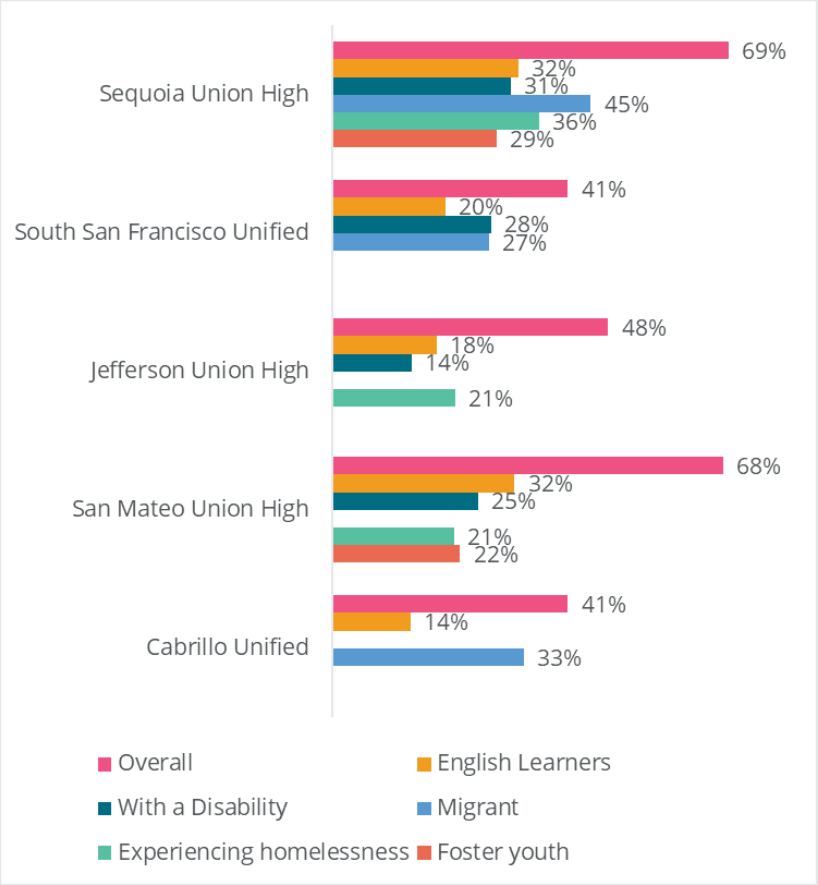
Similarly, students with disabilities in Sequoia Union had the highest rate of meeting admissions standards (31%) compared to peers with disabilities in other districts, but also had the largest gap (38 percentage points) compared to the district's overall student body.

Migrant students met admission standards at the lowest rate in South San Francisco Unified (27%) and at the highest rate in Sequoia Union (45%). However, in Cabrillo Unified, their rates were only eight percentage points lower than that of the overall student body, the smallest gap in the county.

Approximately 36% of students experiencing homelessness in Sequoia Union met CSU or UC admission standards, which was higher than rates in San Mateo Union (21%) and Jefferson Union (21%).

Just San Mateo Union and Sequoia Union had enough foster youth to report their rate of meeting CSU or UC admission standards. In Sequoia Union, 29% met admissions standards and 22% in San Mateo Union met admissions standards.

Figure V-25. Students Meeting University Admission Standards, 2019-2020



Source:

California Department of Education and Root Policy Research.

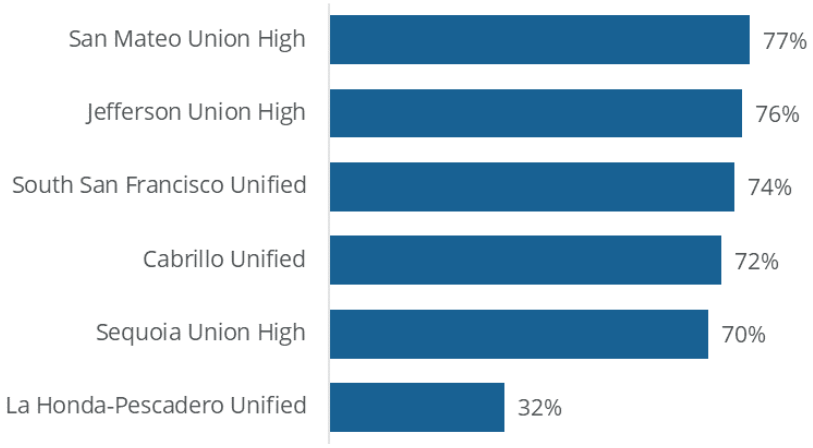
Notes; La-Honda Pescadero Unified is excluded from these data as they do not report admission standards data for these special groups, likely due to small sample size.

College-going rates. The college-going rate is defined as the percentage of public high school students who completed high school in a given year and subsequently enrolled in any public or private postsecondary institution (in-state or out-of-state) in the United States within 12 or 16 months of completing high school.

Most school districts in the county have a college-going rate at 70% or higher. San Mateo Union had the highest college-going rate at 77%. La Honda-Pescadero School District is the notable exception, with just 32% of graduates attending college within 12 or 16 months.

Figure V-26. College-Going Rates, 2017-2018

Source:
California Department of Education and Root Policy Research.

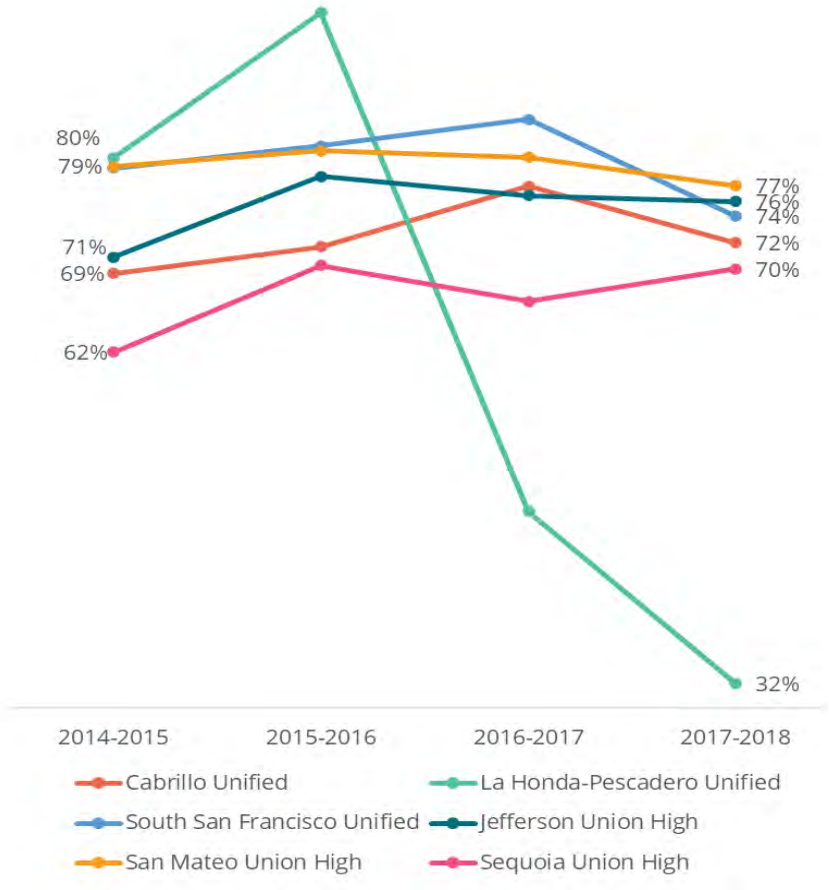


As shown in Figure V-27, La Honda-Pescadero School District previously had the highest college-going rate of all the county's high school districts, with an 80% college-going rate in 2014-2015 and a 93% college-going rate in 2015-2016. The district experienced a rapid decline in college-going rates, starting in 2016-2017. However, La Honda-Pescadero has especially small sample sizes. For instance, the district had just 26 twelfth-graders in the 2017-2018 school year, meaning that just a couple students going to college (or not) drastically alters the college-going rate in La Honda-Pescadero. All other high school districts in the county have maintained relatively consistent college-going rates.

Figure V-27. College-Going Rates, 2014-2015 to 2017-2018

Source:

California Department of Education and Root Policy Research.

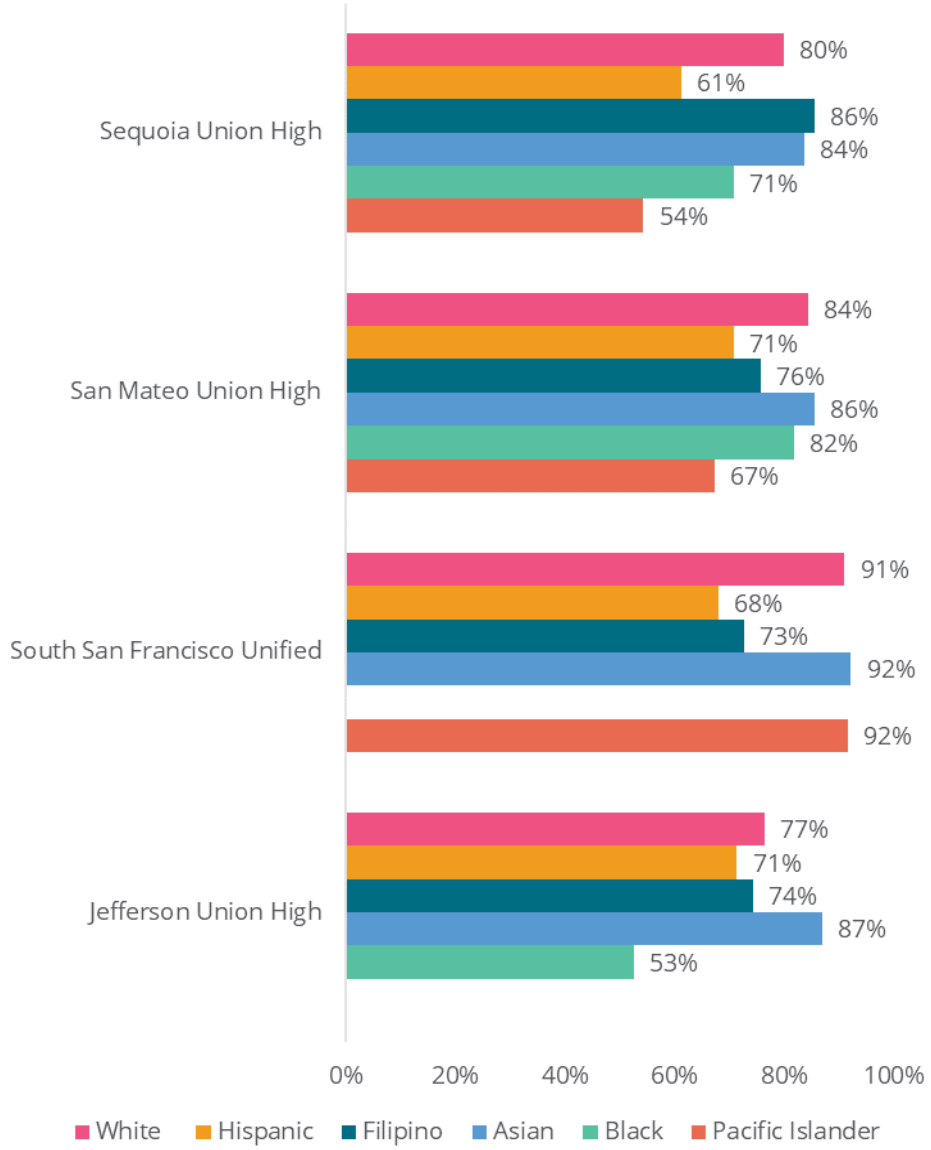


Within each of the high school districts, college-going rates vary by race and ethnicity.

- In every district, White students have a higher college-going rate than Hispanic students, but the largest gaps are in South San Francisco United, where 91% of White students go to college compared to just 68% of Hispanic students, a 23 percentage point gap. Jefferson Union has the smallest gap between the two groups: 77% of White students go to college compared to 71% of Hispanic students.
- Among Black/African American students, those at San Mateo Union have the highest college-going rate at 82%. Those at Jefferson Union have the lowest at just 53%, which is 24 percentage points lower than that of White students and 34 percentage points lower than that of Asian students.
- Overall, Asian students have among the highest college-going-rates in the county. The rate is especially high in South San Francisco Unified, where 92% go to college. The rate is lowest in Sequoia Union High School District, where 84% go to college.

- Filipino students also have generally high rates of college-going. The highest college-going rate among Filipino students is in Sequoia Union (86%) and the lowest is in South San Francisco Unified (73%).
- College-going rates for Pacific Islander students vary substantially by district. For instance, in Sequoia Union 54% go to college, but in South San Francisco Unified 92% go to college.

Figure V-28.
College-going Rates by Race and Ethnicity, 2017-18



Note: Cabrillo Unified and La Honda- Pescadero Unified are not included here because they do not report the data, likely due to small sample sizes.

Source: California Department of Education and Root Policy Research

College-going rates are lower for students with disabilities and those learning English compared to the overall student population across the county.

- For instance, the largest gap between overall college-going rates and English learners' college-going rates is in South San Francisco Unified, where just 52% of English learning students go to college as opposed to 74% of the overall student population— a 22 percentage point gap. Among English learners, San Mateo Union High School District had the highest college-going rate, where 63% of English learners go to college.

- Among students with disabilities, South San Francisco Unified also had the largest gap, where 59% of students with disabilities went to college compared to 74% of the overall student population — a 15 percentage point gap. Jefferson Union, on the other hand, had a relatively high college-going rate among students with disabilities that was not very different from the district's overall college-going rate: 71% went to college which is just five percentage points lower than the district's overall student population.

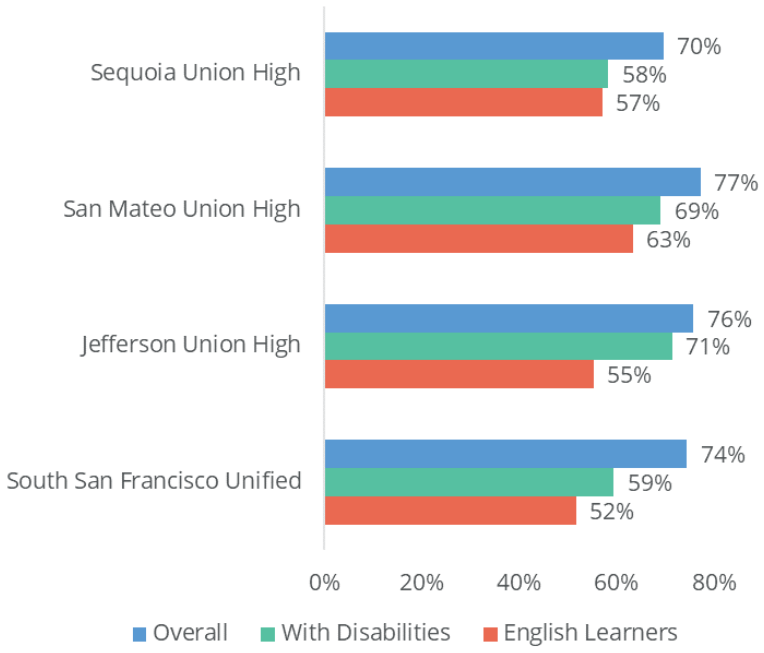
Figure V-29. College-going Rates for English Learners and Students with Disabilities, 2017-2018

Note:

Cabrillo Unified and La Honda-Pescadero Unified are not included here because they do not report the data, likely due to small sample sizes.

Source:

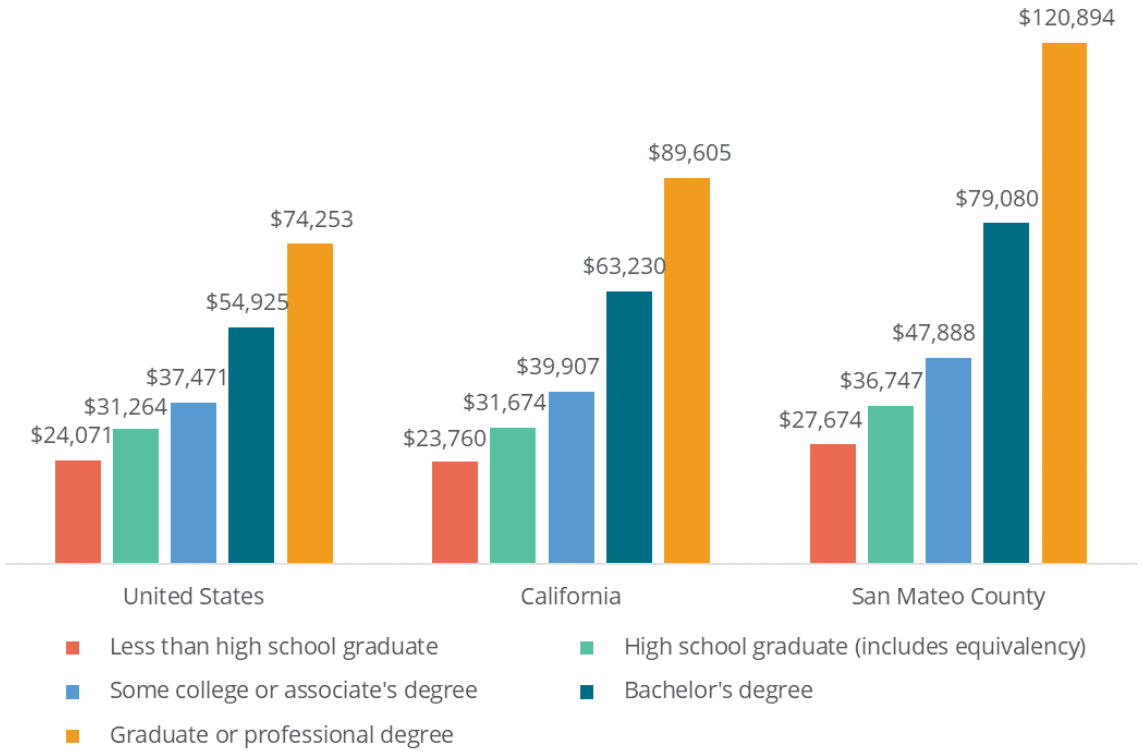
California Department of Education and Root Policy Research.



Gaps in college enrollment by race, ethnicity, disability status, or English learning have stark financial consequences for students in the long-term. Figure V-30 illustrates median annual earnings by educational attainment. College degrees are especially important in San Mateo County: those with a bachelor's degree in the county earn 115% more than those with a high school diploma. This gap is wider in San Mateo County than in other parts of California

and nationwide. The differences between high-school graduate earnings and bachelor's degree earnings are around 100% in California and 76% in the US overall.

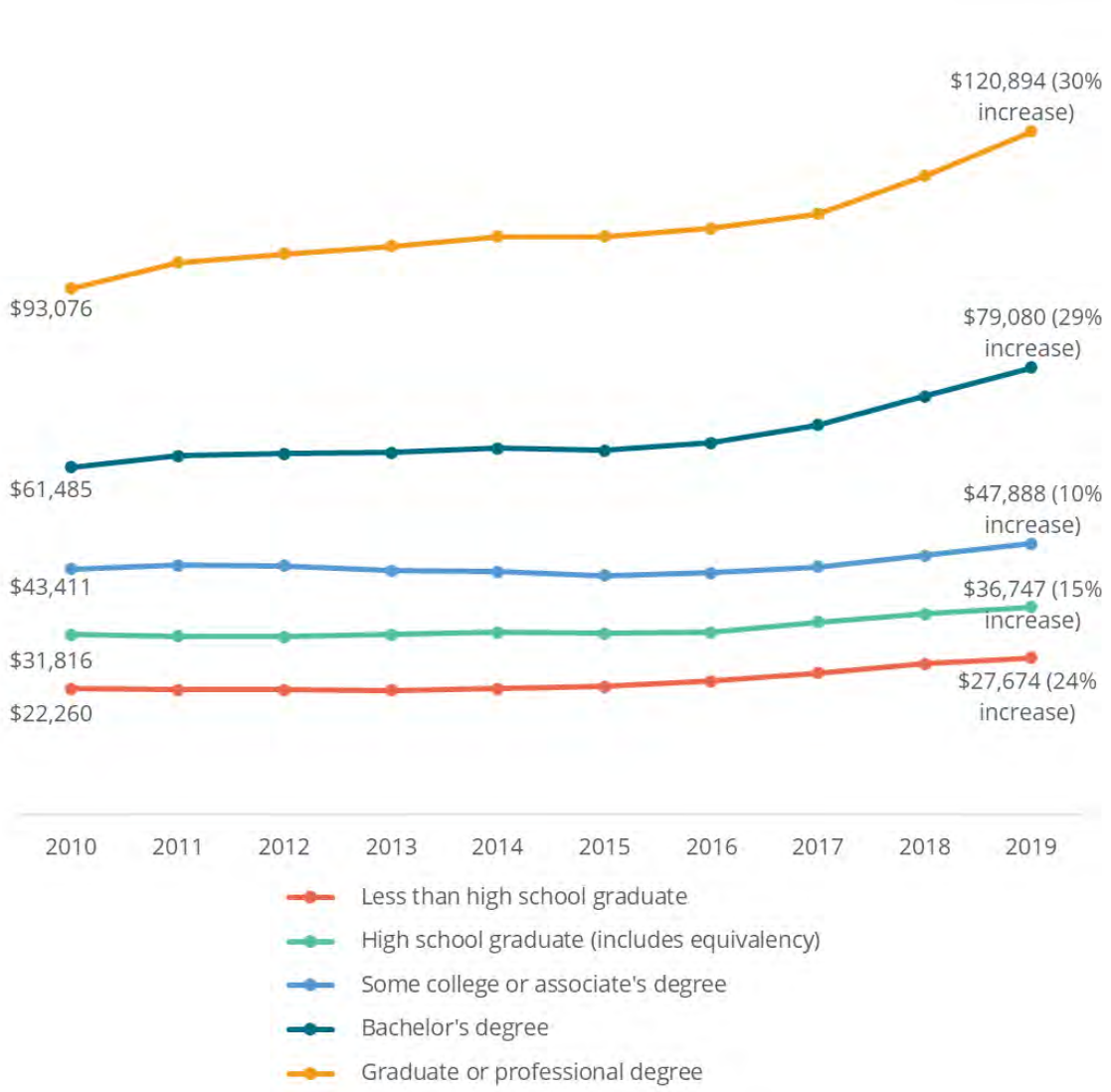
Figure V-30.
Median Annual Earnings by Educational Attainment, 2019



Source: 5-year 2019 American Community Surveys Data.

Unfortunately, the gap between high school graduates' and college graduates' earnings have been increasing in San Mateo County. As illustrated in Figure V-31, median earnings for high school graduates increased by just 15% over the last decade (from $31,816 to $36,747) while earnings for college graduates increased by 29% over the same period (from $61,485 to $79,080).

Figure V-31.
Median Annual Earnings by Educational Attainment in San Mateo County, 2010 to 2019



Source: 5-year American Community Surveys Data.

Because income disparities between college graduates and high school graduates have been increasing, it is increasingly important that school districts in San Mateo County address differences in college-going rates stratified by race, ethnicity, and extenuating circumstances.

Barriers to Success

Many students are unable to achieve academic success because of barriers in home and school. This section explores the available indicators of barriers to success, including chronic absenteeism and dropout rates. It also describes inequities in discipline rates by

race and ethnicity, which has been linked both to discrimination by education professionals as well as a major barrier to students' future success.

Chronic absenteeism. Academic studies have found that if a student is chronically absent, it reduces their math and reading achievement outcomes, educational engagement, and social engagement.[12] Chronic absenteeism also has spillover effects and negatively impacts students who themselves are not chronically absent. For instance, one study found that students suffer academically from having chronically absent classmates—as exhibited across both reading and math testing outcomes.[13]

Students are considered chronically absent if they were absent for 10% or more of the days during a school year. Note, however, students are exempt from chronic absenteeism calculations if they receive instruction through a home or hospital instructional setting, are attending community college full-time, or were not expected to attend more than 31 days.

In the county overall, 10% of students were chronically absent during the 2018-2019 school year.[14] This is a slight increase from the 2016-2017 school year, where just 9% of students overall were chronically absent.

Chronic absenteeism rates were higher in districts with a large number of students experiencing economic and housing precarity. For instance, Ravenswood Elementary, which has a 30% rate of homelessness among students, had one of the higher rates of chronic absenteeism at 16%. La Honda-Pescadero and Sequoia Union high school districts also had high rates of chronically absent students at 16% and 17%, respectively.

When disaggregating by race and ethnicity, just 3% of Asian students were chronically absent, and 7% of White and Filipino students were chronically absent. On the other end of the spectrum, Pacific Islander students (26%), Black/African American students (18%), and Hispanic students (15%) had notably higher rates of chronic absenteeism than the overall student population (10%). Chronic absenteeism among Pacific Islander students has increased in recent years, as illustrated in Figure V-32.

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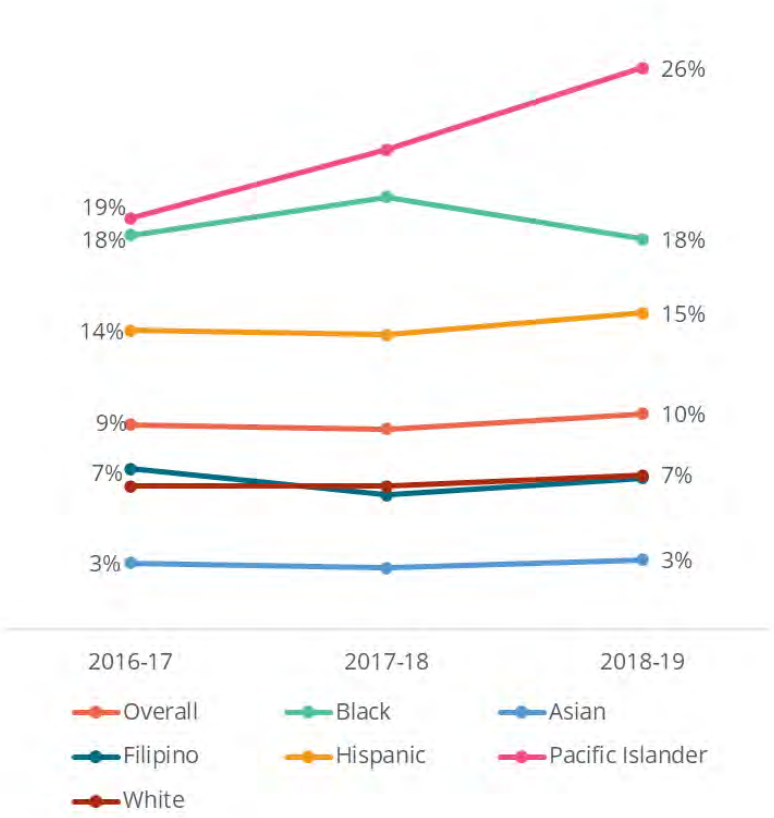
[12] Gottfried, Michael A. "Chronic absenteeism and its effects on students' academic and socioemotional outcomes." Journal of Education for Students Placed at Risk (JESPAR) 19.2 (2014): 53-75.

[13] Gottfried, Michael A. "Chronic absenteeism in the classroom context: Effects on achievement." Urban Education 54.1 (2019): 3-34.

[14] Because of the physical school closures during the COVID-19 pandemic, the California Department of Education determined that 2019–2020 absenteeism data are not valid, therefore, we present data from the 2018-2019 school year.

Figure V-32. Chronic Absenteeism by Race/Ethnicity, 2016-2017 to 2018-2019

Source: California Department of Education and Root Policy Research



Chronic absenteeism among Pacific Islander students was especially pronounced in San Mateo-Foster City school district where there was a 26 percentage point gap between chronic absenteeism rates for Pacific Islander students (32%) and the overall student body (6%). Other districts had similarly large gaps, including San Bruno Park Elementary (20 percentage points) and South San Francisco Unified (18 percentage points).

Some districts had larger gaps in absenteeism rates between Black/African American students and the overall population. For instance, in San Carlos Elementary, 4% of the overall student body is chronically absent compared to 27% of Black/African American students— a 23 percentage point gap. Jefferson Elementary school district had a 17 percentage point gap between their overall chronic absenteeism rate (12%) and their chronic absenteeism rate among Black/African American students (28%).

Among White students, Bayshore Elementary School District was a major outlier, where 46% of White students were chronically absent compared to just 12% of the total student population. However, it is important to note that this represents a very small sample of White students: just 3% of students at Bayshore Elementary are White, one of lowest in the county.

Figure V-33.
Chronic Absenteeism by District and Race/Ethnicity, 2018-2019

School District	Total	Asian	Black	Filipino	Hispanic	Pacific Islander	White
Unified School Districts							
Cabrillo Unified	10%	5%	(no data)	5%	11%	(no data)	10%
La Honda-Pescadero	16%	(no data)	(no data)	(no data)	14%	(no data)	18%
South San Francisco	13%	4%	16%	7%	17%	31%	12%
High & Elementary School Districts							
Jefferson Union High School	15%	8%	22%	11%	22%	18%	15%
Bayshore Elementary	12%	5%	12%	0%	18%	19%	46%
Brisbane Elementary	12%	3%	(no data)	12%	17%	(no data)	17%
Jefferson Elementary	12%	5%	28%	6%	13%	25%	23%
Pacifica	7%	4%	12%	6%	9%	21%	7%
San Mateo Union High School	10%	3%	18%	4%	17%	21%	9%
Burlingame Elementary	5%	2%	15%	5%	10%	20%	5%
Hillsborough Elementary	4%	1%	(no data)	4%	4%	(no data)	6%
Millbrae Elementary	10%	3%	6%	17%	16%	26%	14%
San Bruno Park Elementary	12%	5%	10%	4%	14%	32%	9%
San Mateo-Foster City	6%	2%	9%	2%	10%	32%	4%
Sequoia Union High School	17%	6%	23%	8%	23%	33%	10%
Belmont-Redwood Shores	5%	3%	8%	5%	12%	17%	5%
Las Lomitas Elementary	4%	2%	0%	(no data)	7%	(no data)	3%
Menlo Park City Elementary	3%	1%	8%	7%	5%	14%	3%
Portola Valley Elementary	4%	0%	(no data)	(no data)	6%	(no data)	3%
Ravenswood City Elementary	16%	0%	20%	(no data)	15%	24%	21%
Redwood City Elementary	10%	2%	19%	3%	12%	18%	4%
San Carlos Elementary	4%	2%	27%	8%	7%	(no data)	3%
Woodside Elementary	8%	0%	0%	(no data)	12%	(no data)	7%
Total	10%	3%	18%	7%	15%	26%	7%

Source: California Department of Education and Root Policy Research

In most districts, chronic absenteeism is higher among students with disabilities. In fact, only Bayshore Elementary's students with disabilities had a lower rate of chronic absenteeism than the overall student body. In all other districts, students with disabilities were more likely to be chronically absent than the overall student population. This was particularly true in Sequoia Union High School District, Jefferson Union High School District, and San Mateo Union High School District, which had gaps between the overall

absenteeism rate and the absenteeism rate among students with disabilities of 13, 12, and 11 percentage points, respectively.

Rates of chronic absenteeism were also higher among English learners than the general population in most districts (with the exception of Ravenswood City Elementary and Jefferson Elementary). Woodside Elementary and Sequoia Union High School districts both had 14 percentage point gaps between absenteeism rates of English learners and the overall student body.

In every school district where the data are available, foster youth had higher rates of chronic absenteeism than the overall population. This was especially true in Sequoia Union High School District, where 63% of foster youth were chronically absent compared to just 17% of the overall student body.

Similarly, in almost all districts with available data, students experiencing homelessness had higher rates of chronic absenteeism than the overall student body. The chronic absenteeism rate among students experiencing homelessness was highest in Burlingame Elementary at 64%.

Migrant students were chronically absent at rates similar to or lower than the total student body in all districts with reported data.

Figure V-34.
Chronic Absenteeism by District and Extenuating Circumstance, 2018-2019

School District	Total	English Learners	Experiencing homelessness	Migrant	Foster Youth	With Disabilities
Unified School Districts						
Cabrillo Unified	10%	12%	23%	9%	(no data)	18%
La Honda-Pescadero	16%	16%	(no data)	(no data)	(no data)	22%
South San Francisco	13%	14%	47%	13%	49%	18%
High & Elementary School Districts						
Jefferson Union High School	15%	27%	33%	(no data)	36%	28%
Bayshore Elementary	12%	19%	(no data)	(no data)	(no data)	11%
Brisbane Elementary	12%	18%	(no data)	(no data)	(no data)	18%
Jefferson Elementary	12%	10%	21%	(no data)	24%	16%
Pacifica	7%	11%	(no data)	(no data)	(no data)	14%
San Mateo Union High School	10%	21%	50%	(no data)	53%	21%
Burlingame Elementary	5%	8%	64%	(no data)	(no data)	12%
Hillsborough Elementary	4%	6%	(no data)	(no data)	(no data)	8%
Millbrae Elementary	10%	12%	5%	(no data)	(no data)	12%
San Bruno Park Elementary	12%	12%	(no data)	(no data)	18%	20%
San Mateo-Foster City	6%	8%	15%	(no data)	17%	13%
Sequoia Union High School	17%	31%	52%	16%	63%	29%
Belmont-Redwood Shores	5%	11%	(no data)	(no data)	(no data)	10%
Las Lomitas Elementary	4%	6%	(no data)	(no data)	(no data)	5%
Menlo Park City Elementary	3%	5%	(no data)	(no data)	(no data)	9%
Portola Valley Elementary	4%	3%	(no data)	(no data)	(no data)	9%
Ravenswood City Elementary	16%	16%	19%	17%	23%	21%
Redwood City Elementary	10%	12%	30%	6%	32%	16%
San Carlos Elementary	4%	8%	23%	(no data)	(no data)	11%
Woodside Elementary	8%	22%	(no data)	(no data)	(no data)	10%

Source: California Department of Education and Root Policy Research

Dropout rates. As previously indicated, workers without a high school degree have the lowest annual earnings compared to others at higher levels of educational attainment. In addition to the economic and housing precarity associated with low earnings, low earnings also often lead to increased incentives to participate in criminal activity. In fact, one study

suggest that high school dropouts are 3.5 times more likely than high school graduates to be imprisoned at some point during their lifetime.[15] Another study found that raising the high school completion rate by one percent for all men ages 20 through 60 would save the US $1.4 billion annually in crime related costs.[16] Dropping out of high school also has adverse health costs: for instance, research has shown that high school dropouts are more likely to smoke and have a marijuana disorder in adulthood.[17] For these reasons, reducing high school dropout rates in San Mateo County is pivotal to the health and economic prosperity of the community.

In this report, dropout rates shown for high school districts with available data and are defined as the percentage of cohort students who did not graduate with a regular high school diploma, did not complete high school, and are not still enrolled as a "fifth year senior".

In the 2019-2020 academic year, dropout rates were highest in Sequoia Union High School District, where 10% of students dropped out. This is similar to South San Francisco Unified, where 9% of students dropped out. In both these districts, and in Cabrillo Unified, dropout rates have increased since 2016-2017.

Dropout rates have decreased by one percentage point over the same period in San Mateo Union High School District, from 5% to 4%. Jefferson Union had the lowest dropout rate in the county at just 3%, which after slightly higher rates in 2017-18 and 2018-19, is the same as its 2016-2017 rate.

[15] Monrad, Maggie. "High School Dropout: A Quick Stats Fact Sheet." National High School Center (2007).

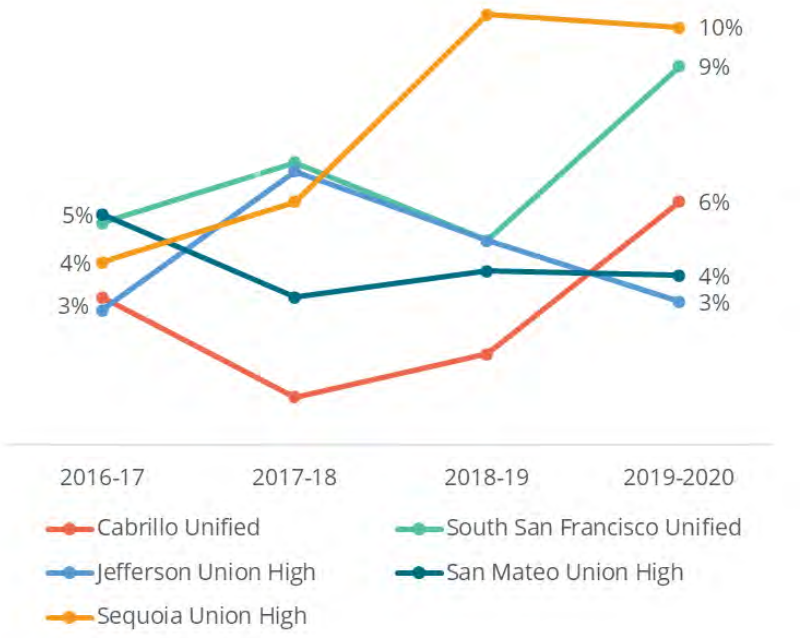
[16] U.S. Department of Justice, Bureau of Justice Statistics. (2002). Correctional populations in the United States, 1998 (NCJ-192929). Washington: U.S. Government Printing Office.

[17] Gonzalez, Jennifer M. Reingle, et al. "The long-term effects of school dropout and GED attainment on substance use disorders." Drug and alcohol dependence 158 (2016): 60-66.

Figure V-35. Dropout Rates by District, 2016-2017 to 2019-2020

Note: La Honda-Pescadero Unified School District is excluded from these data.

Source: California Department of Education and Root Policy Research

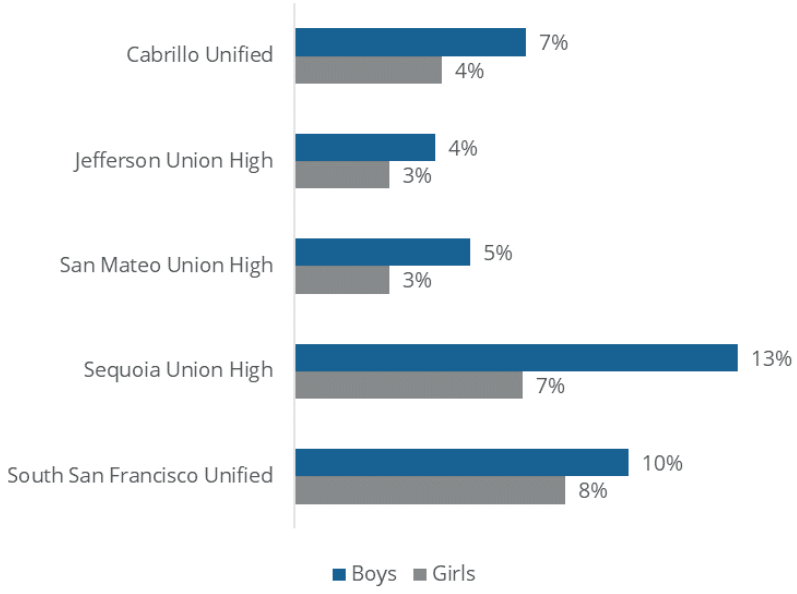


In all school districts in the county, dropout rates are higher for boys than for girls. Jefferson Union had the smallest gender gap, where 3% of girls dropped out and 4% of boys dropped out. Sequoia Union had the widest gender gap, where 13% of boys dropped out compared to just 7% of girls.

Figure V-36. Dropout Rates by Gender, 2019-2020

Note: La Honda-Pescadero Unified School District is excluded from these data.

Source: California Department of Education and Root Policy Research



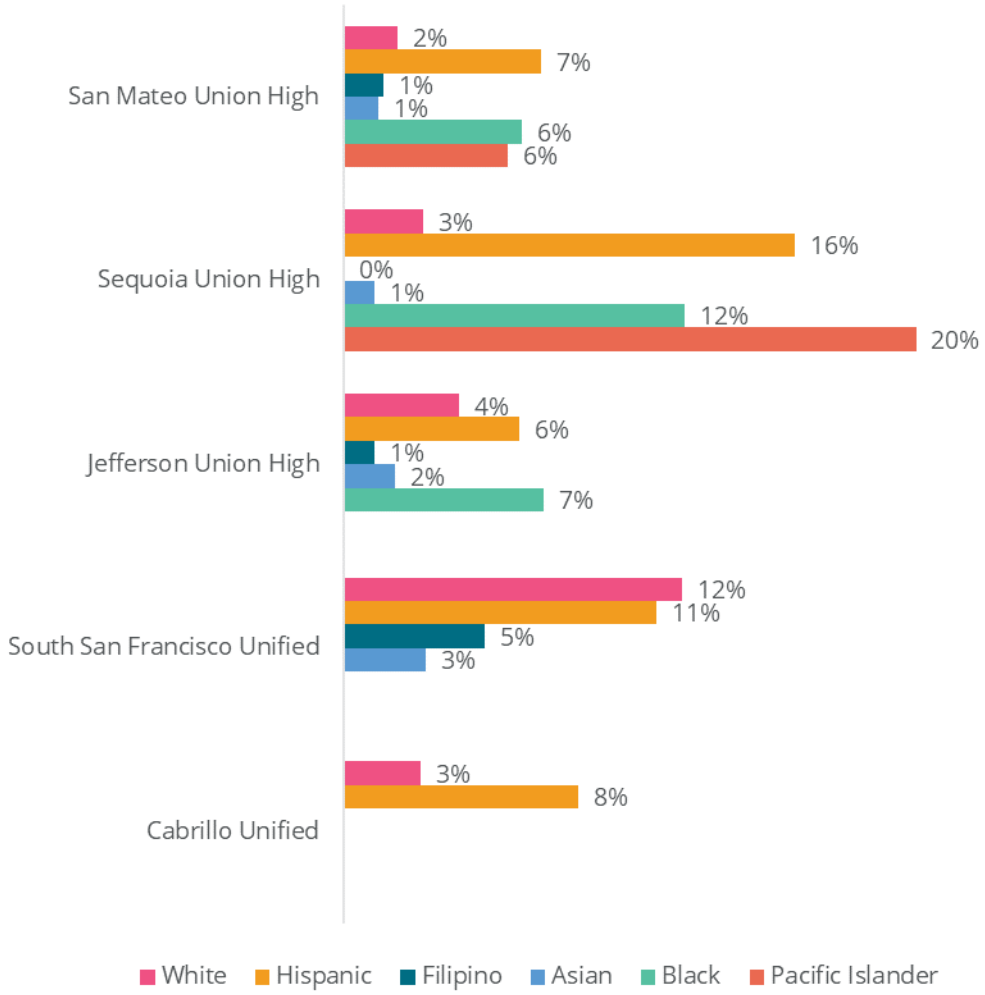
Pacific Islander, Black/African American, and Hispanic students in the county often had higher dropout rates than those in other racial and ethnic groups.

- In Sequoia Union High School District, dropout rates were highest among Pacific Islander students, where 20% dropped out in the 2019-2020 academic year. Dropout rates were also especially high among Hispanic and Black/African American students in Sequoia Union, at 16% and 12% respectively.

- In districts with lower dropout rates, for instance, Jefferson Union, the highest dropout rates still found among Black/African American (7%) and Hispanic students (6%).

- Notably, however, in South San Francisco Unified, White students were more likely to drop out than any other racial or ethnic group. In fact, 12% of White students dropped out compared to 11% of Hispanic students, 5% of Filipino students, and 3% of Asian students. Data for Black/African American and Pacific Islander students were not available for South San Francisco Unified due to small sample sizes.

Figure V-37.
Dropout Rates by Race, 2019-2020



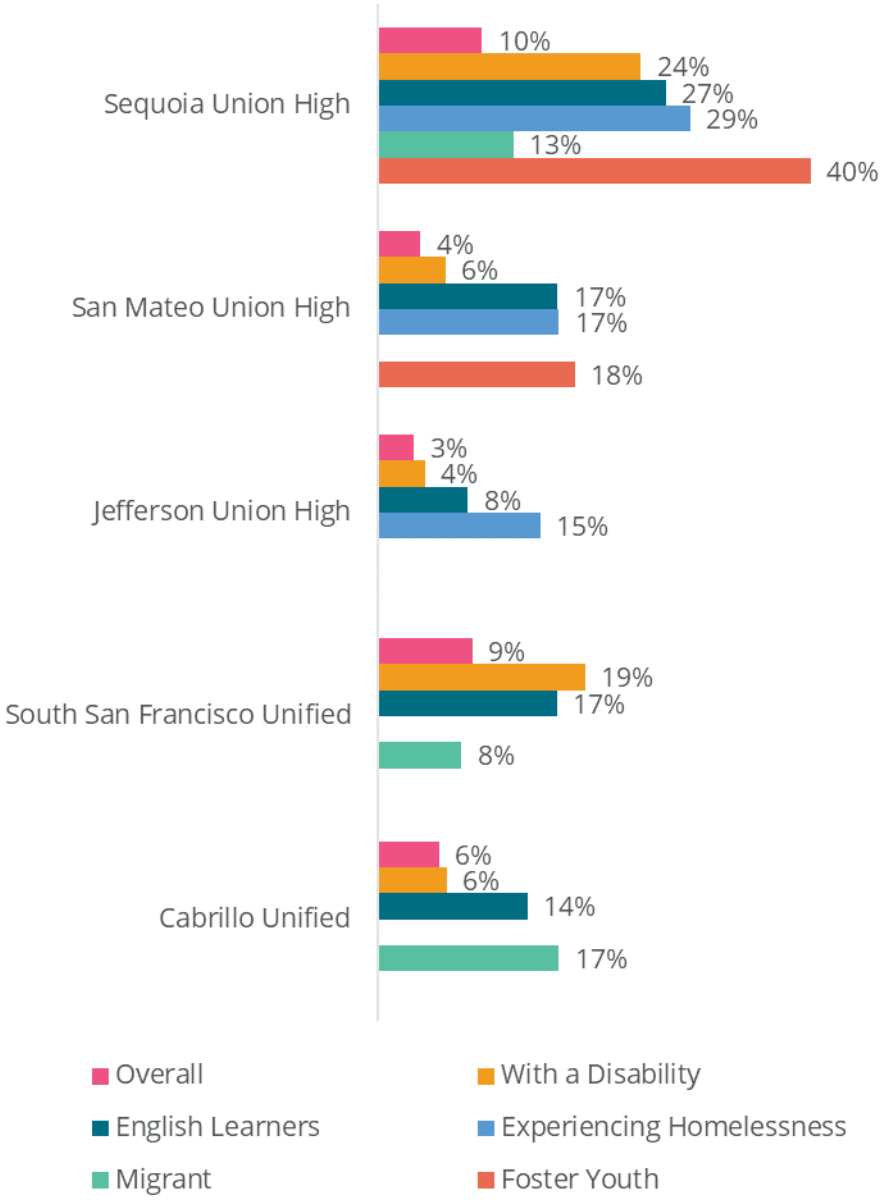
Source: California Department of Education and Root Policy Research

In all school districts in the county, students with disabilities, students experiencing homelessness, foster youth, and students learning English had higher dropout rates than the overall population.

- Among students with disabilities, the highest dropout rate was in Sequoia Union, where 24% dropped out. The gap between overall dropout rates and dropout rates among students with disabilities was wide in Sequoia Union at 14 percentage points.
- Cabrillo Unified, on the other hand, had less than a one percentage point gap between the dropout rate of overall students (6%) and students with disabilities (6%).

- Among students learning English, Sequoia Union had the highest dropout rate at 27%, while Jefferson Union had the lowest dropout rate at 8%.
- Sequoia Union also had the highest rate of dropout among students experiencing homelessness at 29% while Jefferson Union, again, had the lowest at 15%.
- Foster Youth in Sequoia Union had an exceptionally high dropout rate a t 40%. San Mateo Union is the only other district in the county which reported these data in 2019-2020, and found only 18% of foster youth dropped out.
- Migrant students at South San Francisco Unified actually dropped out at a rate slightly lower than the general student body: just 8% of migrant students dropped out compared to 9% of the overall student body. However, those in Cabrillo Unified were 11 percentage points more likely than the total student body to dropout.

Figure V-38.
Dropout Rates by Extenuating Circumstance, 2019-2020



Source: California Department of Education and Root Policy Research

Disproportionate discipline rates. Strict discipline policies may stigmatize suspended students and expose them to the criminal justice system at a young age, setting them up for limited economic and social success down the line. Research has found that suspensions not only negatively affect the suspended students, but also their peers.

Students in schools with higher suspension rates are more likely to drop out or school and less likely to attend a four-year college.[18]

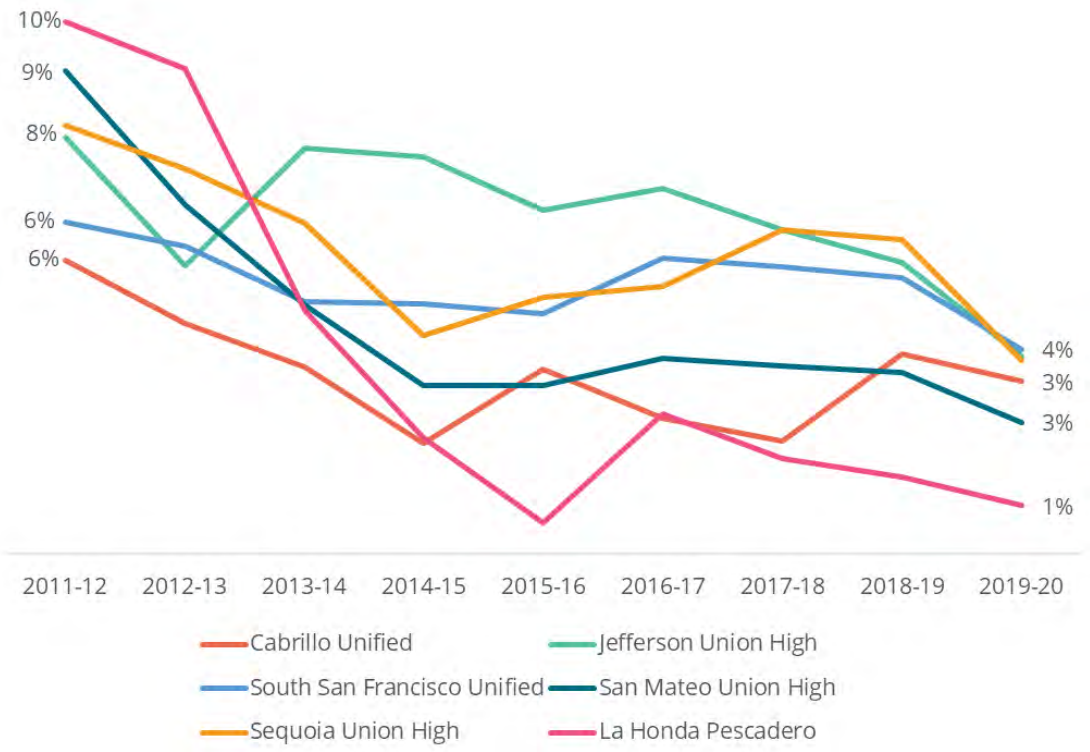
Other academic studies have found that students from African American and Latino families are more likely than their White peers to receive expulsion or out of school suspension as consequences for the same or similar problem behavior.[19] This means that Black/African American and Hispanic students suffer more of the economic and social consequences than their White peers for the same behaviors.

Luckily, in every high school district in San Mateo County, suspension rates have decreased since 2011-2012. La Honda-Pescadero School District experienced the largest decrease: it was the district with the highest suspension rate in 2011-2012 at 10%, but now has the lowest suspension rate at just 1% in 2019-2020. San Mateo Union also experienced a rapid decrease in suspension rates over the same period, with a rate of 9% in 2011-2012 to a rate of 3% in 2019-2020.

[18] Bacher-Hicks, Andrew, Stephen B. Billings, and David J. Deming. The school to prison pipeline: Long-run impacts of school suspensions on adult crime. No. w26257. National Bureau of Economic Research, 2019.

[19] Skiba, Russell J., et al. "Race is not neutral: A national investigation of African American and Latino disproportionality in school discipline." School Psychology Review 40.1 (2011): 85-107.

Figure V-39.
Suspension Rates, 2011-2012 to 2019-2020



Source: California Department of Education and Root Policy Research

In many school districts across San Mateo County, Hispanic students are disciplined at disproportionately higher rates compared to their peers. Figure V-40 compares each racial/ethnic group's share of suspensions to their share of the overall student population.

- In all districts except for La Honda-Pescadero, Hispanic students make up a larger share of suspensions than their overall share of the student body. For instance, in San Mateo Union, 34% of students are Hispanic, but 66% of suspended students are Hispanic, making a 32 percentage point overrepresentation gap.

- In most districts, Black and Pacific Islander students are also overrepresented in terms of suspension rates, but these rates are slight compared to those of Hispanic students. For instance, in Sequoia Union, just 2% of the student body identified as Pacific Islander but 8% of suspended students were Pacific Islander.

- Asian and Filipino students were *underrepresented* in terms of suspension rates. For example, in Jefferson Union High School District, 31% of students identified as Filipino but just 10% of suspended students were Filipino, a 21 percentage point

gap. In San Mateo Union High School, 22% of students identified as Asian but just 5% of suspended students were Asian, a 17 percentage point gap.

- White students were also underrepresented in discipline rates in most districts except for La Honda-Pescadero, where they were overrepresented by 30 percentage points. They were substantially underrepresented in Cabrillo Unified (with a gap of 21 percentage points) and Sequoia Union (18 percentage points).

Figure V-40.
Suspension Rates by Race and Ethnicity, 2019-2020

School District	Cabrillo Unified	Jefferson Union High	La Honda-Pescadero	San Mateo Union High	Sequoia Union High	South San Francisco Unified
Asian Students						
Share of Student Body	1%	14%		22%	9%	13%
Share of Suspensions	1%	7%		5%	1%	3%
Gap	0%	-7%		-17%	-8%	-10%
Black Students						
Share of Student Body		1%		1%	3%	1%
Share of Suspensions		5%		1%	6%	2%
Gap		4%		0%	3%	1%
Filipino Students						
Share of Student Body	1%	31%		6%	2%	23%
Share of Suspensions	0%	10%		2%	0%	9%
Gap	-1%	-21%		-4%	-2%	-14%
Hispanic Students						
Share of Student Body	52%	32%	61%	34%	41%	48%
Share of Suspensions	79%	46%	33%	66%	62%	69%
Gap	27%	14%	-28%	32%	21%	21%
Pacific Islander Students						
Share of Student Body		1%		2%	2%	2%
Share of Suspensions		4%		4%	8%	3%
Gap		3%		2%	6%	1%
White Students						
Share of Student Body	40%	14%	37%	26%	38%	7%
Share of Suspensions	19%	16%	67%	14%	20%	7%
Gap	-21%	2%	30%	-12%	-18%	0%

Notes: the percentage of suspensions and shares of racial groups do not sum to 100% because we exclude students with no reported race, with more than one reported race, where districts did not report racial/ethnic data due to small sample sizes. Gaps of 15 percentage points or more are highlighted.

Source: California Department of Education and Root Policy Research

Staff demographics. Diversity of school staff has been shown to improve outcomes for students of color. For instance, one recent study found that students are less likely to be removed from school as punishment when they and their teachers are the same race. This effect is driven almost entirely by black students, especially black boys, who are markedly less likely to be subjected to exclusionary discipline when taught by black teachers. There is little evidence of any benefit for white students of being matched with white teachers.[20] Other research in California has found that, when students have a teacher of their race, they are more likely to attend class, therefore reducing chronic absenteeism.[21] Even more studies have found that having a teacher of a student's own race substantially improves their math and reading achievement.[22]

In San Mateo County, the demographics of faculty and staff are fairly similar to that of its students. Figure V-41 illustrates the share of the county's faculty and staff who are Asian, Black/African American, Hispanic, Filipino, Pacific Islander, and White, and compares those shares to the racial/ethnic breakdown of the county's student body.

There is a slightly larger share of White and Black/African American staff than students, meaning that Black/African American and White student groups are more likely to interact with same-race staff and faculty than other racial groups. Asian students are less likely to interact with a same-race staff of faculty member: 17% of the student body is Asian compared to just 8% of staff and faculty.

[20] Lindsay, Constance A., and Cassandra MD Hart. "Teacher race and school discipline: Are students suspended less often when they have a teacher of the same race?." Education Next 17.1 (2017): 72-79.

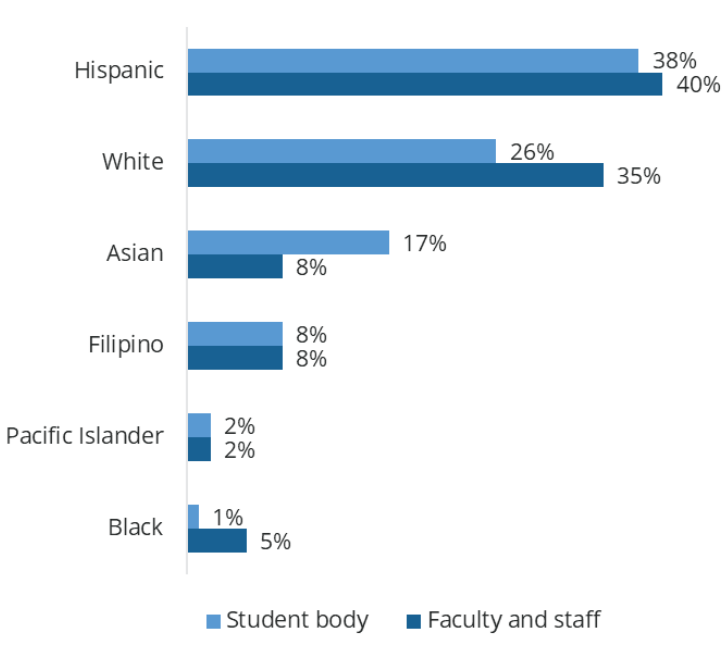
[21] Gottfried, Michael, J. Jacob Kirksey, and Tina L. Fletcher. "Do High School Students With a Same-Race Teacher Attend Class More Often?." Educational Evaluation and Policy Analysis (2021): 01623737211032241.

[22] Dee, T. S. (2004). Teachers, race, and student achievement in a randomized experiment. Review of economics and statistics, 86(1), 195-210.

Figure V-41. Staff and Student Demographics, 2020-2021

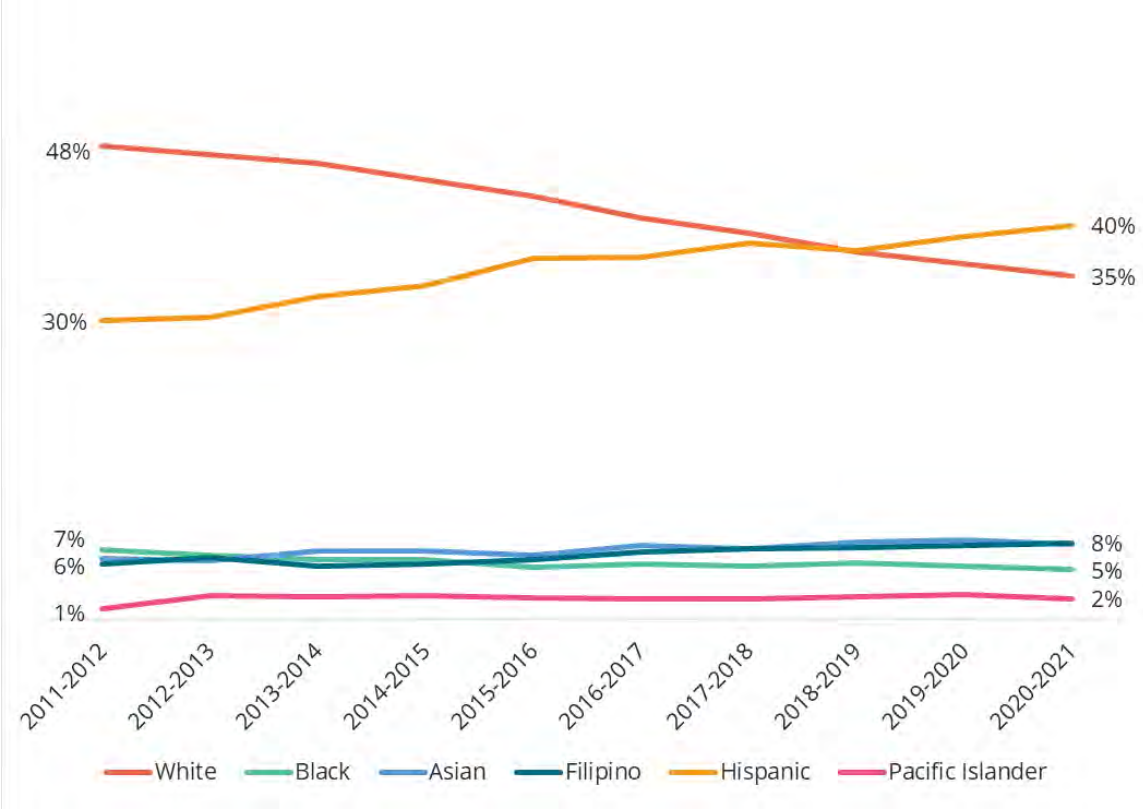
Notes: Percentages do not always sum to 100% because we do not show shares of staff with no reported race, with more than one reported race, or Native American staff.

Source: California Department of Education and Root Policy Research



Since 2011-2012, the county's school districts have diversified in that there has been a 13 percentage point decrease in the share of White faculty and staff and a 10 percentage point increase in Hispanic faculty and staff. However, there has been a slight decrease (by two percentage points) in the share of faculty and staff who identify as Black/African American. There has been a two percentage point increase in the share of Asian and Filipino faculty and staff, and a one percent increase in the share of Pacific Islander faculty and staff.

Figure V-42.
Faculty and Staff Demographics, 2011-2012 to 2020-2021



Notes: Percentages do not always sum to 100% because we do not show shares of staff with no reported race, with more than one reported race, or Native American staff.

Source: California Department of Education and Root Policy Research

Figure V-43 illustrates faculty and staff racial and ethnic diversity for the 2020-2021 school year by district.

- Portola Valley has the least diverse faculty and staff in the county, with 59% identifying as White.
- Ravenswood Elementary has the most diverse faculty and staff: the district has the highest share of Pacific Islander (5%), Black/African American (12%) and Hispanic (72%) faculty and staff.
- South San Francisco Unified School District has the highest share of Asian faculty and staff at 14%.
- Brisbane Elementary and Jefferson Elementary have the highest shares of Filipino faculty and staff at 28%.

Figure V-43.
Faculty and Staff Race/Ethnicity, by District, 2020-2021

School District	Asian	Black	Filipino	Hispanic	Pacific Islander	White
Unified School Districts						
Cabrillo Unified	0%	1%	1%	46%	0%	51%
La Honda-Pescadero	0%	5%	5%	39%	0%	51%
South San Francisco	14%	3%	16%	34%	2%	28%
High & Elementary School Districts						
Jefferson Union High School	3%	3%	13%	26%	1%	43%
Bayshore Elementary	13%	4%	17%	61%	0%	4%
Brisbane Elementary	7%	0%	28%	20%	4%	42%
Jefferson Elementary	13%	3%	28%	25%	0%	29%
Pacifica	7%	2%	8%	23%	2%	54%
San Mateo Union High School	11%	5%	6%	34%	3%	40%
Burlingame Elementary	8%	5%	11%	27%	3%	45%
Hillsborough Elementary	2%	1%	7%	20%	1%	55%
Millbrae Elementary	13%	3%	9%	25%	0%	48%
San Bruno Park Elementary	4%	2%	13%	26%	4%	48%
San Mateo-Foster City	13%	2%	7%	33%	3%	37%
Sequoia Union High School	2%	12%	2%	54%	4%	26%
Belmont-Redwood Shores	13%	2%	3%	39%	0%	42%
Las Lomitas Elementary	7%	7%	0%	42%	0%	42%
Menlo Park City Elementary	3%	1%	3%	28%	1%	40%
Portola Valley Elementary	4%	4%	0%	33%	0%	59%
Ravenswood City Elementary	2%	12%	1%	72%	5%	3%
Redwood City Elementary	4%	5%	2%	65%	1%	21%
San Carlos Elementary	8%	6%	3%	37%	1%	42%
Woodside Elementary	12%	8%	0%	30%	0%	49%
Total	8%	5%	8%	40%	2%	35%

Notes: Percentages do not always sum to 100% because we do not show shares of staff with no reported race, with more than one reported race, or Native American staff.

Source: California Department of Education and Root Policy Research

Figure V-44 illustrates the gap between faculty/staff representation and the student body. For instance, at San Bruno Park Elementary, 15% of the students are White while 48% of the faculty/staff are White, leaving a 33 percentage point gap.

If schools are striving for a distribution of faculty/staff that reflects the racial and ethnic distribution of their student body, the closer to a 0 percentage point gap, the better. Schools like San Bruno Park Elementary fall short of meeting this goal, in that there is a large overrepresentation of White faculty/staff compared to the student body. Many other districts have a large overrepresentation of White faculty/staff, including Millbrae Elementary (32 percentage point gap), Jefferson Union High School District (29 percentage point gap), and South San Francisco Unified School District (22 percentage points). There are just a few school districts where the share of White students is higher than the share of White faculty, particularly Woodside Elementary and Menlo Park City Elementary, both with a 15 percentage point gap.

Across most school districts, the share of Asian students is larger than the share of Asian faculty/staff. This suggests that Asian students are less likely than their peers to interact with a same-race teacher or staff member. The largest disparity is in Millbrae Elementary, where just 13% of the faculty identify as Asian compared to 46% of the student body, a 33 percentage point gap.

In many school districts, there is a dearth of Hispanic faculty and staff. For instance, in La Honda-Pescadero, 63% of students are Hispanic compared to 39% of faculty, a 24 percentage point gap. In other districts, however, there is a larger share of Hispanic faculty/staff than students. In Las Lomitas Elementary, for instance, 13% of students are Hispanic and 42% of faculty/staff are Hispanic. Recall that Las Lomitas Elementary commonly has high-performing English language learnings students. This may be partly due to the district's large portion of Hispanic faculty/staff.

Though district wide there are approximately the same portions of Filipino students as there are faculty/staff, Jefferson Union High School stands out as a district where Filipino students are less likely to interact with a same-race teacher or staff member. In Jefferson Union, 29% of students are Filipino compared to just 13% of faculty/staff.

In all districts, there only very small gaps in the share of students that identify as Pacific Islander and the share of faculty/staff that identify as Pacific Islander. All in all, they are represented in approximately equal proportions.

Figure V-44.
Difference Between Staff and Student Populations, by District, 2020-2021

School District	Asian	Black	Filipino	Hispanic	Pacific Islander	White
Unified School Districts						
Cabrillo Unified	-1%	1%	0%	-6%	0%	11%
La Honda-Pescadero	0%	5%	4%	-24%	0%	16%
South San Francisco	0%	2%	-7%	-14%	0%	22%
High & Elementary School Districts						
Jefferson Union High School	-12%	2%	-16%	-5%	0%	29%
Bayshore Elementary	-6%	1%	-4%	20%	-4%	1%
Brisbane Elementary	-13%	-1%	16%	-8%	4%	18%
Jefferson Elementary	-6%	1%	3%	-11%	-1%	18%
Pacifica	-1%	1%	-1%	-3%	2%	15%
San Mateo Union High School	-12%	4%	1%	2%	1%	12%
Burlingame Elementary	-19%	5%	8%	11%	3%	4%
Hillsborough Elementary	-30%	1%	5%	15%	1%	7%
Millbrae Elementary	-33%	2%	3%	5%	-2%	32%
San Bruno Park Elementary	-12%	1%	3%	-15%	-1%	33%
San Mateo-Foster City	-13%	1%	4%	-4%	1%	16%
Sequoia Union High School	-7%	10%	1%	9%	2%	-9%
Belmont-Redwood Shores	-19%	1%	0%	27%	-1%	8%
Las Lomitas Elementary	-11%	6%	-1%	29%	0%	-11%
Menlo Park City Elementary	-10%	0%	2%	11%	0%	-15%
Portola Valley Elementary	-2%	4%	0%	19%	0%	-7%
Ravenswood City Elementary	2%	7%	1%	-12%	-2%	2%
Redwood City Elementary	0%	4%	1%	-5%	0%	2%
San Carlos Elementary	-10%	5%	2%	23%	1%	-7%
Woodside Elementary	8%	6%	0%	14%	-1%	-15%
Total	-9%	4%	0%	2%	0%	9%

Notes: The figure shows percentage point gaps in student representation versus faculty/staff representation (calculated as the share of faculty/staff minus the share of students).

Source: California Department of Education and Root Policy Research

AFFH Attachment C.4.

BELMONT SEGREGATION REPORT

UC Merced Urban Policy Lab and ABAG/MTC Staff

Version of Record: March 06, 15:54:31



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1 INTRODUCTION

The requirement to Affirmatively Further Fair Housing (AFFH) is derived from The Fair Housing Act of 1968, which prohibited discrimination concerning the sale, rental, and financing of housing based on race, color, religion, national origin, or sex—and was later amended to include familial status and disability.[1] The 2015 U.S. Department of Housing and Urban Development (HUD) Rule to Affirmatively Further Fair Housing and California Assembly Bill 686 (2018) mandate that each jurisdiction takes meaningful action to address significant disparities in housing needs and access to opportunity.[2][3] AB 686 requires that jurisdictions incorporate AFFH into their Housing Elements, which includes inclusive community participation, an assessment of fair housing, a site inventory reflective of AFFH, and the development of goals, policies, and programs to meaningfully address local fair housing issues. ABAG and UC Merced have prepared this report to assist Bay Area jurisdictions with the Assessment of Fair Housing section of the Housing Element.

Assessment of Fair Housing Components

The Assessment of Fair Housing includes five components, which are discussed in detail on pages 22-43 of HCD's AFFH Guidance Memo:

A: Summary of fair housing enforcement and outreach capacity

B: Integration and segregation patterns, and trends related to people with protected characteristics

C: Racially or ethnically concentrated areas of poverty

D: Disparities in access to opportunity

E: Disproportionate housing needs, including displacement risk

1.1 Purpose of this Report

This report describes racial and income segregation in Bay Area jurisdictions. Local jurisdiction staff can use the information in this report to help fulfill a portion of the second component of the Assessment of Fair Housing, which requires analysis of integration and segregation patterns and trends related to people with protected characteristics and lower incomes. Jurisdictions will still need to perform a similar analysis for familial status and populations with disability.

This report provides segregation measures for both the local jurisdiction and the region using several indices. For segregation between neighborhoods within a city (intra-city segregation), this report includes isolation indices, dissimilarity indices, and Theil's-H index. The isolation index measures

[1] https://www.justice.gov/crt/fair-housing-act-2
[2] HCD AFFH Guidance Memo
[3] The 2015 HUD rule was reversed in 2020 and partially reinstated in 2021.

segregation for a single group, while the dissimilarity index measures segregation between two groups. The Theil's H-Index can be used to measure segregation between all racial or income groups across the city at once. HCD's AFFH guidelines require local jurisdictions to include isolation indices and dissimilarity indices in the Housing Element. Theil's H index is provided in addition to these required measures. For segregation between cities within the Bay Area (inter-city segregation), this report includes dissimilarity indices at the regional level as required by HCD's AFFH guidelines. HCD's AFFH guidelines also require jurisdictions to compare conditions at the local level to the rest of the region; and this report presents the difference in the racial and income composition of a jurisdiction relative to the region as a whole to satisfy the comparison requirement.

1.2 Defining Segregation

Segregation is the separation of different demographic groups into different geographic locations or communities, meaning that groups are unevenly distributed across geographic space. This report examines two spatial forms of segregation: neighborhood level segregation *within* a local jurisdiction and city level segregation *between* jurisdictions in the Bay Area.

Neighborhood level segregation (*within* a jurisdiction, or *intra-city*): Segregation of race and income groups can occur from neighborhood to neighborhood *within* a city. For example, if a local jurisdiction has a population that is 20% Latinx, but some neighborhoods are 80% Latinx while others have nearly no Latinx residents, that jurisdiction would have segregated neighborhoods.

City level segregation (*between* jurisdictions in a region, or *inter-city*): Race and income divides also occur *between* jurisdictions in a region. A region could be very diverse with equal numbers of white, Asian, Black, and Latinx residents, but the region could also be highly segregated with each city comprised solely of one racial group.

There are many factors that have contributed to the generation and maintenance of segregation. Historically, racial segregation stemmed from explicit discrimination against people of color, such as restrictive covenants, redlining, and discrimination in mortgage lending. This history includes many overtly discriminatory policies made by federal, state, and local governments (Rothstein 2017). Segregation patterns are also affected by policies that appear race-neutral, such as land use decisions and the regulation of housing development.

Segregation has resulted in vastly unequal access to public goods such as quality schools, neighborhood services and amenities, parks and playgrounds, clean air and water, and public safety (Trounstine 2015). This generational lack of access for many communities, particularly people of color and lower income residents, has often resulted in poor life outcomes, including lower educational attainment, higher morbidity rates, and higher mortality rates (Chetty and Hendren 2018, Ananat 2011, Burch 2014, Cutler and Glaeser 1997, Sampson 2012, Sharkey 2013).

1.3 Segregation Patterns in the Bay Area

Across the San Francisco Bay Area, white residents and above moderate-income residents are significantly more segregated from other racial and income groups (see Appendix 2). The highest levels of racial segregation occur between the Black and white populations. The analysis completed for this report indicates that the amount of racial segregation both *within* Bay Area cities and *across* jurisdictions in the region has decreased since the year 2000. This finding is consistent with recent research from the Othering and Belonging Institute at UC Berkeley, which concluded that "[a]lthough 7

of the 9 Bay Area counties were more segregated in 2020 than they were in either 1980 or 1990, racial residential segregation in the region appears to have peaked around the year 2000 and has generally declined since."[4] However, compared to cities in other parts of California, Bay Area jurisdictions have more neighborhood level segregation between residents from different racial groups. Additionally, there is also more racial segregation *between* Bay Area cities compared to other regions in the state.

1.4 Segregation and Land Use

It is difficult to address segregation patterns without an analysis of both historical and existing land use policies that impact segregation patterns. Land use regulations influence what kind of housing is built in a city or neighborhood (Lens and Monkkonen 2016, Pendall 2000). These land use regulations in turn impact demographics: they can be used to affect the number of houses in a community, the number of people who live in the community, the wealth of the people who live in the community, and where within the community they reside (Trounstine 2018). Given disparities in wealth by race and ethnicity, the ability to afford housing in different neighborhoods, as influenced by land use regulations, is highly differentiated across racial and ethnic groups (Bayer, McMillan, and Reuben 2004).[5] ABAG/MTC plans to issue a separate report detailing the existing land use policies that influence segregation patterns in the Bay Area.

[4] For more information, see https://belonging.berkeley.edu/most-segregated-cities-bay-area-2020.
[5] Using a household-weighted median of Bay Area county median household incomes, regional values were $61,050 for Black residents, $122,174 for Asian/Pacific Islander residents, $121,794 for white residents, and $76,306 for Latinx residents. For the source data, see U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B19013B, Table B19013D, B19013H, and B19013I.

Definition of Terms - Geographies

Neighborhood: In this report, "neighborhoods" are approximated by tracts.[6] Tracts are statistical geographic units defined by the U.S. Census Bureau for the purposes of disseminating data. In the Bay Area, tracts contain on average 4,500 residents. Nearly all Bay Area jurisdictions contain at least two census tracts, with larger jurisdictions containing dozens of tracts.

Jurisdiction: Jurisdiction is used to refer to the 109 cities, towns, and unincorporated county areas that are members of ABAG. Though not all ABAG jurisdictions are cities, this report also uses the term "city" interchangeably with "jurisdiction" in some places.

Region: The region is the nine-county San Francisco Bay Area, which is comprised of Alameda County, Contra Costa County, Marin County, Napa County, San Francisco County, San Mateo County, Santa Clara County, Solano County, and Sonoma County.

[6] Throughout this report, neighborhood level segregation measures are calculated using census tract data. However, the racial dot maps in Figure 1 and Figure 5 use data from census blocks, while the income group dot maps in Figure 8 and Figure 12 use data from census block groups. These maps use data derived from a smaller geographic scale to better show spatial differences in where different groups live. Census block groups are subdivisions of census tracts, and census blocks are subdivisions of block groups. In the Bay Area, block groups contain on average 1,500 people, while census blocks contain on average 95 people.

2 RACIAL SEGREGATION IN CITY OF BELMONT

Definition of Terms - Racial/Ethnic Groups

The U.S. Census Bureau classifies racial groups (e.g. white or Black/African American) separately from Hispanic/Latino ethnicity.[7] This report combines U.S. Census Bureau definitions for race and ethnicity into the following racial groups:

White: Non-Hispanic white

Latinx: Hispanic or Latino of any race[8]

Black: Non-Hispanic Black/African American

Asian/Pacific Islander: Non-Hispanic Asian or Non-Hispanic Pacific Islander

People of Color: All who are not non-Hispanic white (including people who identify as "some other race" or "two or more races")[9]

2.1 Neighborhood Level Racial Segregation (*within* City of Belmont)

Racial dot maps are useful for visualizing how multiple racial groups are distributed within a specific geography. The racial dot map of Belmont in Figure 1 below offers a visual representation of the spatial distribution of racial groups within the jurisdiction. Generally, when the distribution of dots does not suggest patterns or clustering, segregation measures tend to be lower. Conversely, when clusters of certain groups are apparent on a racial dot map, segregation measures may be higher.

[7] More information about the Census Bureau's definitions of racial groups is available here: https://www.census.gov/topics/population/race/about.html.
[8] The term Hispanic has historically been used to describe people from numerous Central American, South American, and Caribbean countries. In recent years, the term Latino or Latinx has become preferred. This report generally uses Latinx to refer to this racial/ethnic group.
[9] Given the uncertainty in the data for population size estimates for racial and ethnic groups not included in the Latinx, Black, or Asian/Pacific Islander categories, this report only analyzes these racial groups in the aggregate People of Color category.

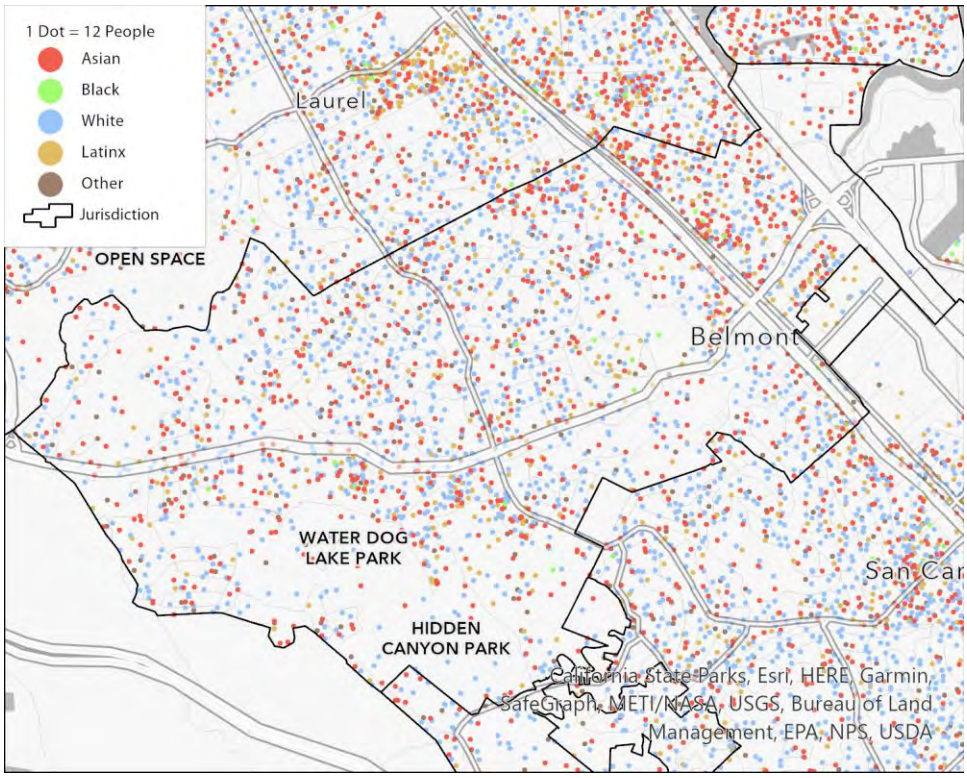


Figure 1: Racial Dot Map of Belmont (2020)

Universe: Population. Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: The plot shows the racial distribution at the census block level for City of Belmont and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.

There are many ways to quantitatively measure segregation. Each measure captures a different aspect of the ways in which groups are divided within a community. One way to measure segregation is by using an isolation index:

- The isolation index compares each neighborhood's composition to the jurisdiction's demographics as a whole.
- This index ranges from 0 to 1. Higher values indicate that a particular group is more isolated from other groups.
- Isolation indices indicate the potential for contact between different groups. The index can be interpreted as the experience of the average member of that group. For example, if the isolation index is .65 for Latinx residents in a city, then the average Latinx resident in that city lives in a neighborhood that is 65% Latinx.

Within City of Belmont the most isolated racial group is white residents. Belmont's isolation index of 0.485 for white residents means that the average white resident lives in a neighborhood that is 48.5% white. Other racial groups are less isolated, meaning they may be more likely to encounter other racial groups in their neighborhoods. The isolation index values for all racial groups in Belmont for the years 2000, 2010, and 2020 can be found in Table 1 below. Among all racial groups in this jurisdiction, the white population's isolation index has changed the most over time, becoming less segregated from other racial groups between 2000 and 2020.

The "Bay Area Average" column in this table provides the average isolation index value across Bay Area jurisdictions for different racial groups in 2020.[10] The data in this column can be used as a comparison to provide context for the levels of segregation experienced by racial groups in this jurisdiction. For example, Table 1 indicates the average isolation index value for white residents across all Bay Area jurisdictions is 0.491, meaning that in the average Bay Area jurisdiction a white resident lives in a neighborhood that is 49.1% white.

Table 1: Racial Isolation Index Values for Segregation within Belmont

	Belmont			Bay Area Average
Race	**2000**	**2010**	**2020**	**2020**
Asian/Pacific Islander	0.166	0.215	0.302	0.245
Black/African American	0.016	0.018	0.014	0.053
Latinx	0.092	0.124	0.130	0.251
White	0.712	0.624	0.485	0.491

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Figure 2 below shows how racial isolation index values in Belmont compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each racial group, the spread of dots represents the range of isolation index values among Bay Area jurisdictions. Additionally, the black line within each racial group notes the isolation index value for that group in City of Belmont, and each dashed red line represents the Bay Area average for the isolation index for that group. Local staff can use this chart to contextualize how segregation levels for racial groups in their jurisdiction compare to other jurisdictions in the region.

[10] This average only includes the 104 jurisdictions that have more than one census tract, which is true for all comparisons of Bay Area jurisdictions' segregation measures in this report. The segregation measures in this report are calculated by comparing the demographics of a jurisdiction's census tracts to the jurisdiction's demographics, and such calculations cannot be made for the five jurisdictions with only one census tract (Brisbane, Calistoga, Portola Valley, Rio Vista, and Yountville).

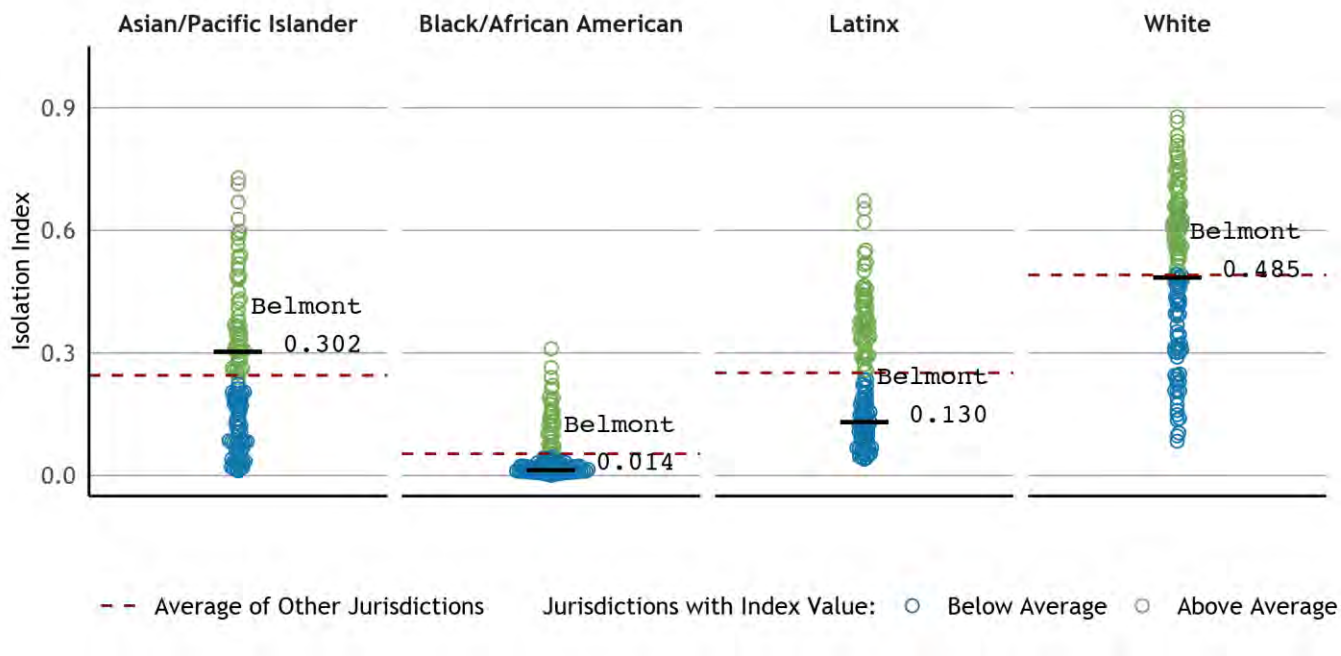


Figure 2: Racial Isolation Index Values for Belmont Compared to Other Bay Area Jurisdictions (2020)

Universe: Bay Area Jurisdictions.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

Another way to measure segregation is by using a dissimilarity index:

- This index measures how evenly any two groups are distributed across neighborhoods relative to their representation in a city overall. The dissimilarity index at the jurisdiction level can be interpreted as the share of one group that would have to move neighborhoods to create perfect integration for these two groups.
- The dissimilarity index ranges from 0 to 1. Higher values indicate that groups are more unevenly distributed (e.g. they tend to live in different neighborhoods).

Dissimilarity Index Guidance for Cities with Small Racial Group Populations

The analysis conducted for this report suggests that dissimilarity index values are unreliable for a population group if that group represents approximately less than 5% of the jurisdiction's total population.

HCD's AFFH guidance requires the Housing Element to include the dissimilarity index values for racial groups, but also offers flexibility in emphasizing the importance of various measures. ABAG/MTC recommends that when cities have population groups that are less than 5% of the jurisdiction's population (see Table 4), jurisdiction staff use the isolation index or Thiel's H-Index to gain a more accurate understanding of their jurisdiction's neighborhood-level segregation patterns (*intra*-city segregation).

If a jurisdiction has a very small population of a racial group, this indicates that segregation between the jurisdiction and the region (*inter*-city segregation) is likely to be an important feature of the jurisdiction's segregation patterns.

In City of Belmont, the Black/African American group is 1.2 percent of the population - so staff should be aware of this small population size when evaluating dissimilarity index values involving this group.

Table 2 below provides the dissimilarity index values indicating the level of segregation in Belmont between white residents and residents who are Black, Latinx, or Asian/Pacific Islander. The table also provides the dissimilarity index between white residents and all residents of color in the jurisdiction, and all dissimilarity index values are shown across three time periods (2000, 2010, and 2020).

In Belmont the highest segregation is between Black and white residents (see Table 2). Belmont's Black /white dissimilarity index of 0.165 means that 16.5% of Black (or white) residents would need to move to a different neighborhood to create perfect integration between Black residents and white residents. However, local jurisdiction staff should note that this dissimilarity index value is not a reliable data point due to small population size. See callout box above for more information.

The "Bay Area Average" column in this table provides the average dissimilarity index values for these racial group pairings across Bay Area jurisdictions in 2020. The data in this column can be used as a comparison to provide context for the levels of segregation between communities of color are from white residents in this jurisdiction.

For example, Table 2 indicates that the average Latinx/white dissimilarity index for a Bay Area jurisdiction is 0.207, so on average 20.7% of Latinx (or white residents) in a Bay Area jurisdiction would need to move to a different neighborhood within the jurisdiction to create perfect integration between Latinx and white residents in that jurisdiction.

Table 2: Racial Dissimilarity Index Values for Segregation within Belmont

	Belmont			Bay Area Average
Race	**2000**	**2010**	**2020**	**2020**
Asian/Pacific Islander vs. White	0.161	0.156	0.088	0.185
Black/African American vs. White	0.151*	0.175*	0.165*	0.244
Latinx vs. White	0.151	0.142	0.119	0.207
People of Color vs. White	0.141	0.139	0.087	0.168

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.
Note: If a number is marked with an asterisk (*), it indicates that the index is based on a racial group making up less than 5 percent of the jurisdiction population, leading to unreliable numbers.

Figure 3 below shows how dissimilarity index values in City of Belmont compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each racial group pairing, the spread of dots represents the range of dissimilarity index values among Bay Area jurisdictions. Additionally, the black line within each racial group pairing notes the dissimilarity index value in Belmont, and each dashed red line represents the Bay Area average for the dissimilarity index for that pairing. Similar to Figure 2, local staff can use this chart to contextualize how segregation levels between white residents and communities of color in their jurisdiction compare to the rest of the region. However, staff should be mindful of whether a racial group in their jurisdiction has a small population (approximately less than 5% of the jurisdiction's population), as the dissimilarity index value is less reliable for small populations.

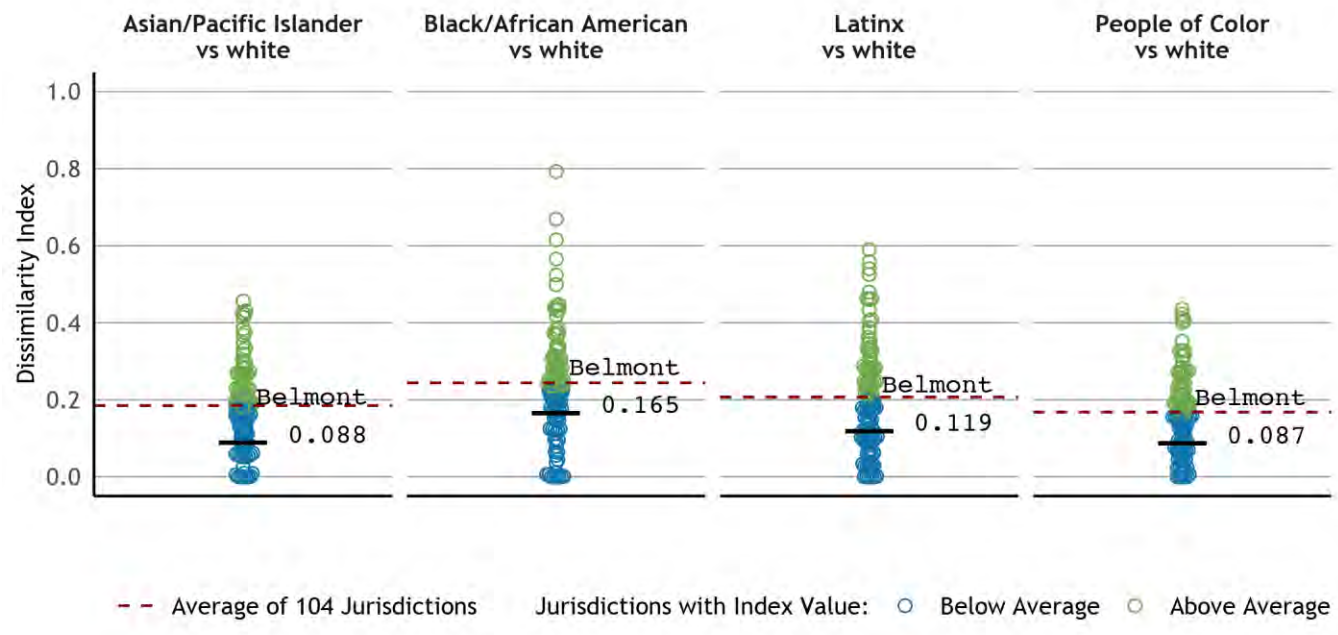


Figure 3: Racial Dissimilarity Index Values for Belmont Compared to Other Bay Area Jurisdictions (2020)

Universe: Bay Area Jurisdictions.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: The analysis conducted for this report suggests that dissimilarity index values are unreliable for a population group if that group represents approximately less than 5% of the jurisdiction's total population. ABAG/MTC recommends that when cities have population groups that are less than 5% of the jurisdiction's population (see Table 4), jurisdiction staff could focus on the isolation index or Thiel's H-Index to gain a more accurate understanding of neighborhood-level racial segregation in their jurisdiction.

The **Theil's H Index** can be used to measure segregation between all groups within a jurisdiction:

- This index measures how diverse each neighborhood is compared to the diversity of the whole city. Neighborhoods are weighted by their size, so that larger neighborhoods play a more significant role in determining the total measure of segregation.
- The index ranges from 0 to 1. A Theil's H Index value of 0 would mean all neighborhoods within a city have the same demographics as the whole city. A value of 1 would mean each group lives exclusively in their own, separate neighborhood.
- For jurisdictions with a high degree of diversity (multiple racial groups comprise more than 10% of the population), Theil's H offers the clearest summary of overall segregation.

The Theil's H Index values for neighborhood racial segregation in Belmont for the years 2000, 2010, and 2020 can be found in Table 3 below. The "Bay Area Average" column in the table provides the average Theil's H Index across Bay Area jurisdictions in 2020. Between 2010 and 2020, the Theil's H Index for racial segregation in Belmont declined, suggesting that there is now less neighborhood level racial segregation within the jurisdiction. In 2020, the Theil's H Index for racial segregation in Belmont was

lower than the average value for Bay Area jurisdictions, indicating that neighborhood level racial segregation in Belmont is less than in the average Bay Area city.

Table 3: Theil's H Index Values for Racial Segregation within Belmont

	Belmont			Bay Area Average
Index	**2000**	**2010**	**2020**	**2020**
Theil's H Multi-racial	0.014	0.015	0.007	0.042

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Figure 4 below shows how Theil's H index values for racial segregation in Belmont compare to values in other Bay Area jurisdictions in 2020. In this chart, each dot represents a Bay Area jurisdiction. Additionally, the black line notes the Theil's H index value for neighborhood racial segregation in Belmont, and the dashed red line represents the average Theil's H index value across Bay Area jurisdictions. Local staff can use this chart to compare how neighborhood racial segregation levels in their jurisdiction compare to other jurisdictions in the region.

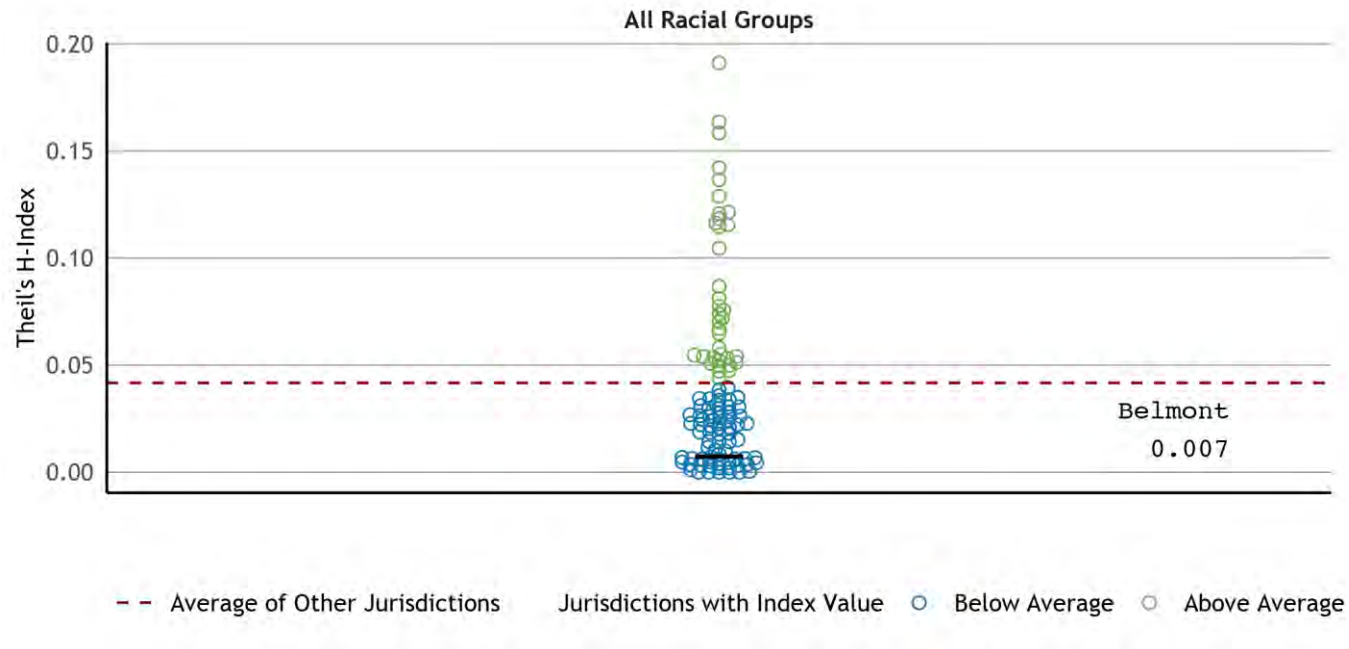


Figure 4: Theil's H Index Values for Racial Segregation in Belmont Compared to Other Bay Area Jurisdictions (2020)

Universe: Bay Area Jurisdictions.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

2.2 Regional Racial Segregation (*between* Belmont and other jurisdictions)

At the regional level, segregation is measured between *cities* instead of between *neighborhoods*. Racial dot maps are not only useful for examining neighborhood racial segregation within a jurisdiction, but these maps can also be used to explore the racial demographic differences between different jurisdictions in the region. Figure 5 below presents a racial dot map showing the spatial distribution of racial groups in Belmont as well as in nearby Bay Area cities.

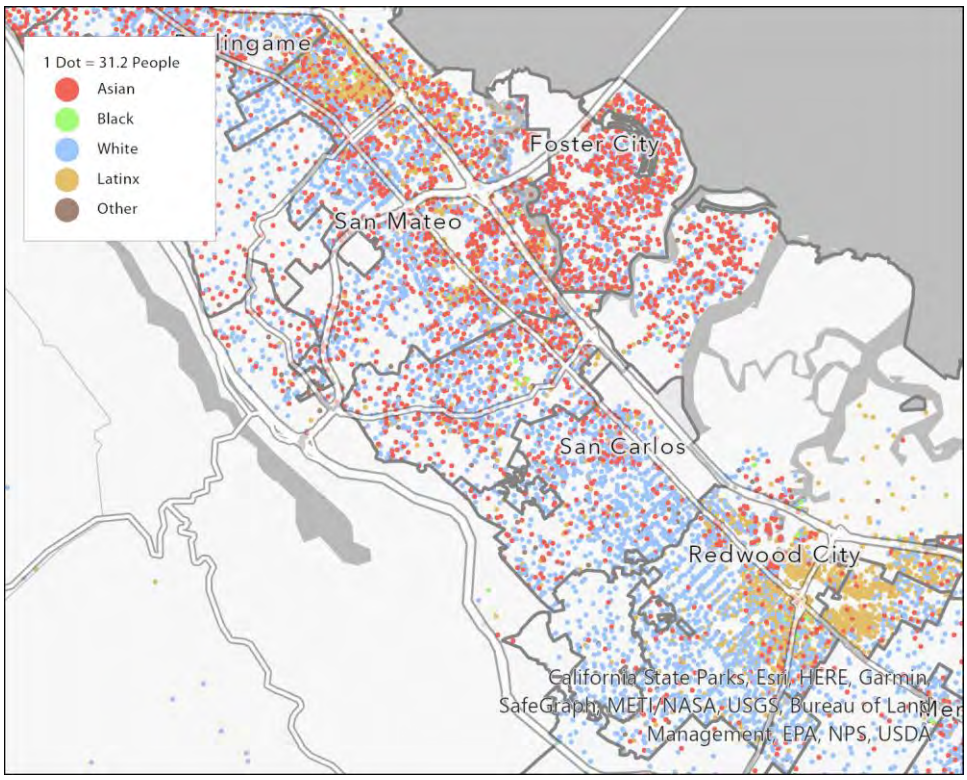


Figure 5: Racial Dot Map of Belmont and Surrounding Areas (2020)

Universe: Population.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: The plot shows the racial distribution at the census block level for City of Belmont and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.

To understand how each city contributes to the total segregation of the Bay Area, one can look at the difference in the racial composition of a jurisdiction compared to the racial composition of the region as a whole. The racial demographics in Belmont for the years 2000, 2010, and 2020 can be found in Table 4 below. The table also provides the racial composition of the nine-county Bay Area. As of 2020, Belmont has a higher share of white residents than the Bay Area as a whole, a lower share of Latinx residents, a lower share of Black residents, and a higher share of Asian/Pacific Islander residents.

Table 4: Population by Racial Group, Belmont and the Region

	Belmont			Bay Area
Race	**2000**	**2010**	**2020**	**2020**
Asian/Pacific Islander	15.3%	20.4%	29.9%	28.2%
Black/African American	1.5%	1.6%	1.2%	5.6%
Latinx	8.3%	11.5%	12.4%	24.4%
Other or Multiple Races	4.4%	5.2%	8.6%	5.9%
White	70.4%	61.3%	47.9%	35.8%

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Figure 6 below compares the racial demographics in Belmont to those of all 109 Bay Area jurisdictions.[11] In this chart, each dot represents a Bay Area jurisdiction. For each racial group, the spread of dots represents the range of that group's representation among Bay Area jurisdictions. Additionally, the black line within each racial group notes the percentage of the population of City of Belmont represented by that group and how that percentage ranks among all 109 jurisdictions. Local staff can use this chart to compare the representation of different racial groups in their jurisdiction to those groups' representation in other jurisdictions in the region, which can indicate the extent of segregation between this jurisdiction and the region.

[11] While comparisons of segregation measures are made only using the 104 jurisdictions with more than one census tract, this comparison of jurisdiction level demographic data can be made using all 109 jurisdictions.

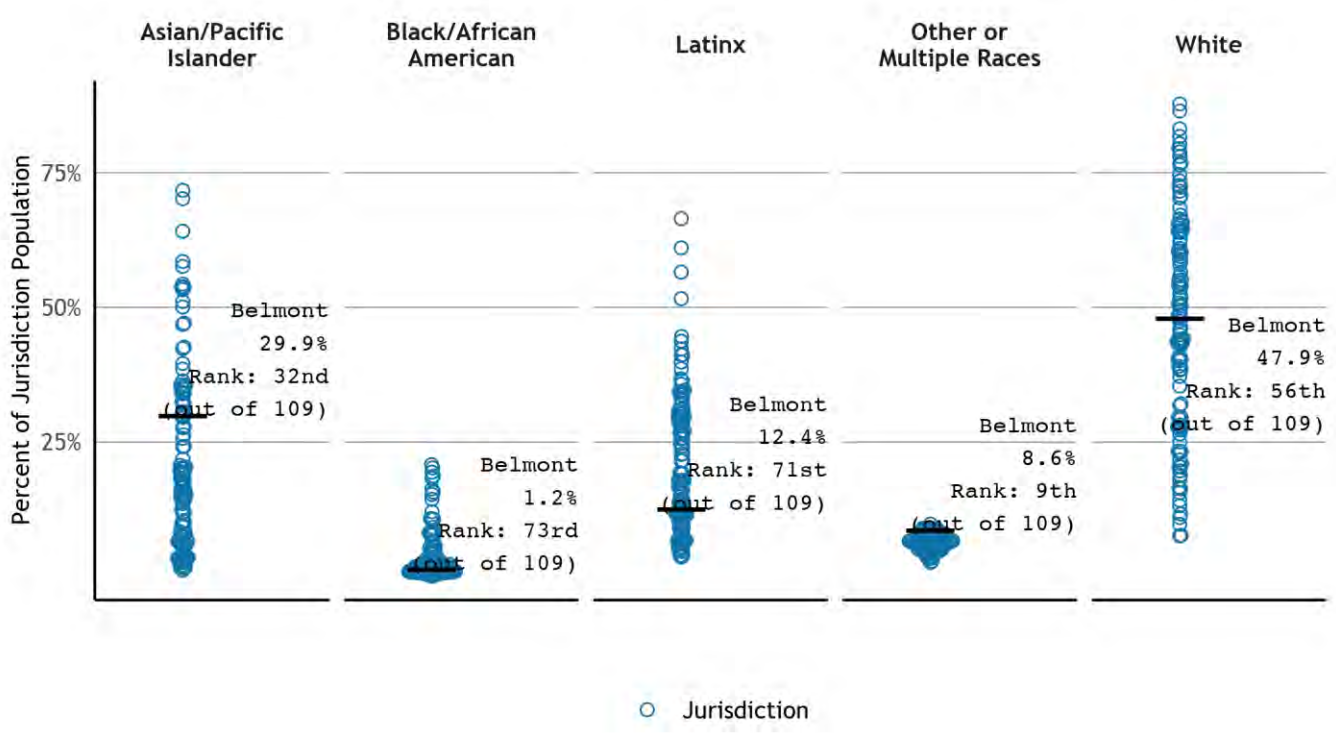


Figure 6: Racial Demographics of Belmont Compared to All Bay Area Jurisdictions (2020)

Universe: Bay Area Jurisdictions.
Source U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

The map in Figure 7 below also illustrates regional racial segregation between Belmont and other jurisdictions. This map demonstrates how the percentage of people of color in Belmont and surrounding jurisdictions compares to the Bay Area as a whole:

- Jurisdictions shaded orange have a share of people of color that is less than the Bay Area as a whole, and the degree of difference is greater than five percentage points.
- Jurisdictions shaded white have a share of people of color comparable to the regional percentage of people of color (within five percentage points).
- Jurisdictions shaded grey have a share of people of color that is more than five percentage points greater than the regional percentage of people of color.

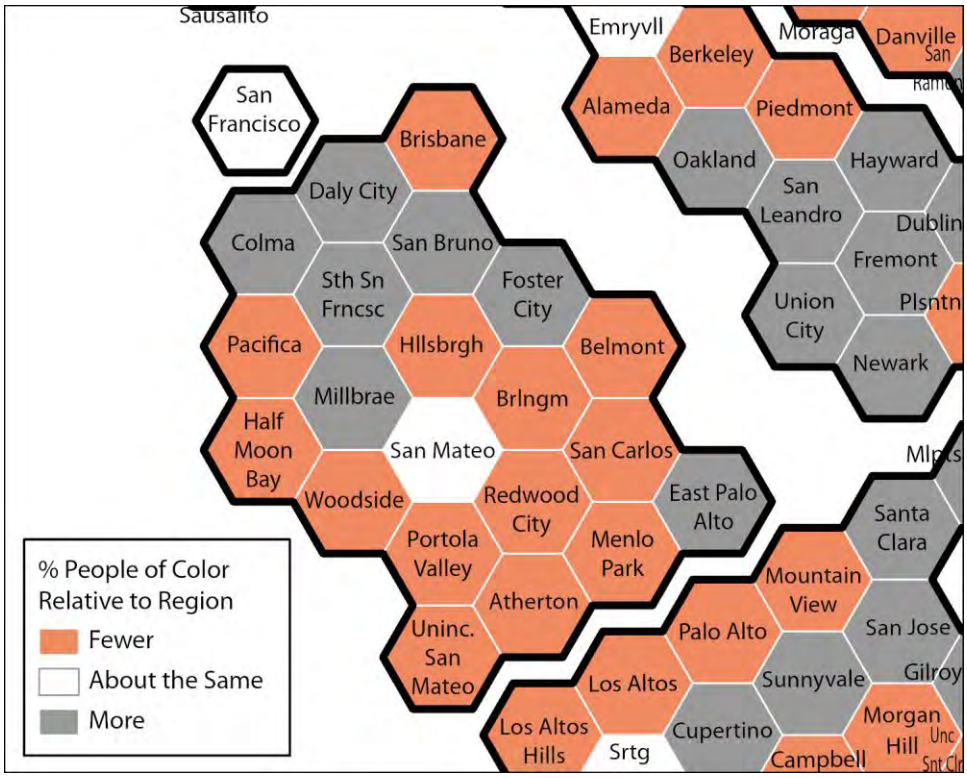


Figure 7: Comparing the Share of People of Color in Belmont and Vicinity to the Bay Area (2020)

Universe: Population.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: People of color refer to persons not identifying as non-Hispanic white. The nine-county Bay Area is the reference region for this map.

Segregation between jurisdictions in the region can also be analyzed by calculating regional values for the segregation indices discussed previously. Table 5 presents dissimilarity index, isolation index, and Theil's H index values for racial segregation for the entire nine-county Bay Area in 2010 and 2020. In the previous section of this report focused on neighborhood level racial segregation, these indices were calculated by comparing the racial demographics of the census tracts within a jurisdiction to the demographics of the jurisdiction as a whole. In Table 5, these measures are calculated by comparing the racial demographics of local jurisdictions to the region's racial makeup. For example, looking at the 2020 data, Table 5 shows the white isolation index value for the region is 0.429, meaning that on average white Bay Area residents live in a jurisdiction that is 42.9% white in 2020. An example of regional dissimilarity index values in Table 5 is the Black/white dissimilarity index value of 0.459, which means that across the region 45.9% of Black (or white) residents would need to move to a different jurisdiction to evenly distribute Black and white residents across Bay Area jurisdictions. The dissimilarity index values in Table 5 reflect recommendations made in HCD's AFFH guidance for calculating dissimilarity at the region level.[12] The regional value for the Theil's H index measures how

[12] For more information on HCD's recommendations regarding data considerations for analyzing integration and segregation patterns, see page 31 of the AFFH Guidance Memo.

diverse each Bay Area jurisdiction is compared to the racial diversity of the whole region. A Theil's H Index value of 0 would mean all *jurisdictions* within the Bay Area have the same racial demographics as the entire region, while a value of 1 would mean each racial group lives exclusively in their own separate jurisdiction. The regional Theil's H index value for racial segregation decreased slightly between 2010 and 2020, meaning that racial groups in the Bay Area are now slightly less separated by the borders between jurisdictions.

Table 5: Regional Racial Segregation Measures

Index	Group	2010	2020
Isolation Index Regional Level	Asian/Pacific Islander	0.317	0.378
	Black/African American	0.144	0.118
	Latinx	0.283	0.291
	White	0.496	0.429
	People of Color	0.629	0.682
Dissimilarity Index Regional Level	Asian/Pacific Islander vs. White	0.384	0.369
	Black/African American vs. White	0.475	0.459
	Latinx vs. White	0.301	0.297
	People of Color vs. White	0.296	0.293
Theil's H Multi-racial	All Racial Groups	0.103	0.097

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, 2010 Census of Population and Housing, Table P4.

3 INCOME SEGREGATION IN CITY OF BELMONT

Definition of Terms - Income Groups

When analyzing segregation by income, this report uses income group designations consistent with the Regional Housing Needs Allocation and the Housing Element:

Very low-income: individuals earning less than 50% of Area Median Income (AMI)

Low-income: individuals earning 50%-80% of AMI

Moderate-income: individuals earning 80%-120% of AMI

Above moderate-income: individuals earning 120% or more of AMI

Additionally, this report uses the term "lower-income" to refer to all people who earn less than 80% of AMI, which includes both low-income and very low-income individuals.

The income groups described above are based on U.S. Department of Housing and Urban Development (HUD) calculations for AMI. HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County).

The income categories used in this report are based on the AMI for the HUD metro area where this jurisdiction is located.

3.1 Neighborhood Level Income Segregation (*within* Belmont)

Income segregation can be measured using similar indices as racial segregation. Income dot maps, similar to the racial dot maps shown in Figures 1 and 5, are useful for visualizing segregation between multiple income groups at the same time. The income dot map of Belmont in Figure 8 below offers a visual representation of the spatial distribution of income groups within the jurisdiction. As with the racial dot maps, when the dots show lack of a pattern or clustering, income segregation measures tend to be lower, and conversely, when clusters are apparent, the segregation measures may be higher as well.

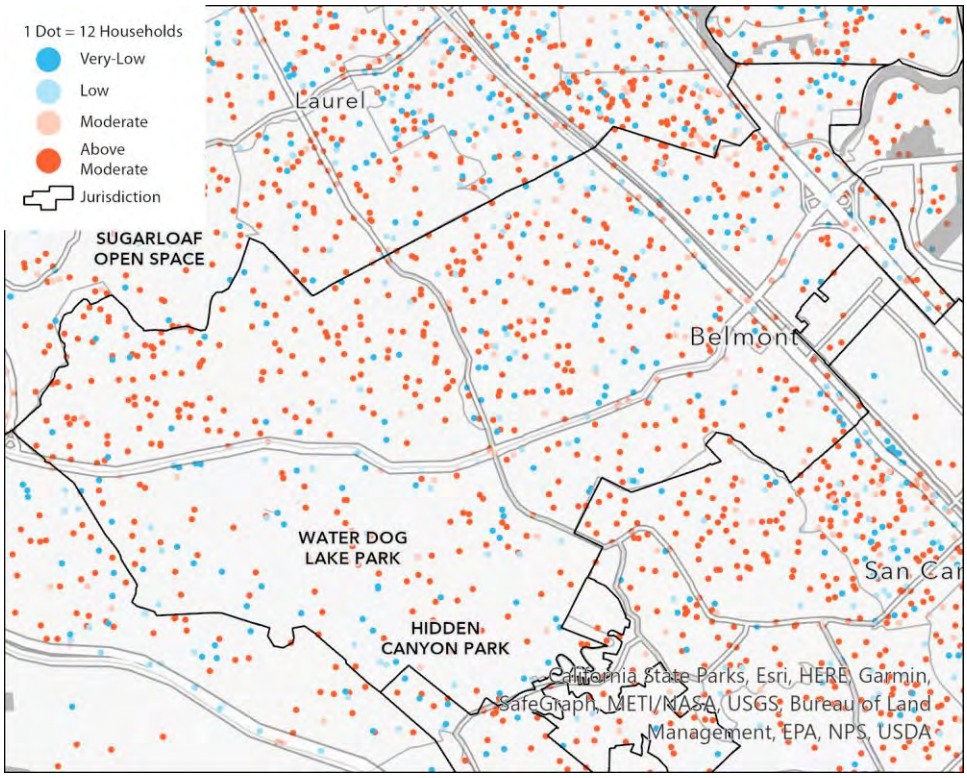


Figure 8: Income Dot Map of Belmont (2015)

Universe: Population.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.
Note: The plot shows the income group distribution at the census block group level for City of Belmont and vicinity. Dots in each block group are randomly placed and should not be construed as actual placement of individuals.

The isolation index values for all income groups in Belmont for the years 2010 and 2015 can be found in Table 6 below.[13] Above Moderate-income residents are the most isolated income group in Belmont. Belmont's isolation index of 0.527 for these residents means that the average Above Moderate-income resident in Belmont lives in a neighborhood that is 52.7% Above Moderate-income. Among all income groups, the Very Low-income population's isolation index has changed the most over time, becoming more segregated from other income groups between 2010 and 2015.

Similar to the tables presented earlier for neighborhood racial segregation, the "Bay Area Average" column in Table 6 provides the average isolation index value across Bay Area jurisdictions for different income groups in 2015. The data in this column can be used as a comparison to provide context for the levels of segregation experienced by income groups in this jurisdiction. For example, Table 6 indicates the average isolation index value for very low-income residents across Bay Area jurisdictions is 0.269,

[13] This report presents data for income segregation for the years 2010 and 2015, which is different than the time periods used for racial segregation. This deviation stems from the data source recommended for income segregation calculations in HCD's AFFH Guidelines. This data source most recently updated with data from the 2011-2015 American Community Survey 5-year estimates. For more information on HCD's recommendations for calculating income segregation, see page 32 of HCD's AFFH Guidelines.

meaning that in the average Bay Area jurisdiction a very low-income resident lives in a neighborhood that is 26.9% very low-income.

Table 6: Income Group Isolation Index Values for Segregation within Belmont

	Belmont		Bay Area Average
Income Group	**2010**	**2015**	**2015**
Very Low-Income (<50% AMI)	0.173	0.243	0.269
Low-Income (50%-80% AMI)	0.146	0.125	0.145
Moderate-Income (80%-120% AMI)	0.213	0.182	0.183
Above Moderate-Income (>120% AMI)	0.513	0.527	0.507

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 9 below shows how income group isolation index values in Belmont compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each income group, the spread of dots represents the range of isolation index values among Bay Area jurisdictions. Additionally, the black line within each income group notes the isolation index value for that group in Belmont, and each dashed red line represents the Bay Area average for the isolation index for that group. Local staff can use this chart to contextualize how segregation levels for income groups in their jurisdiction compare to the rest of the region.

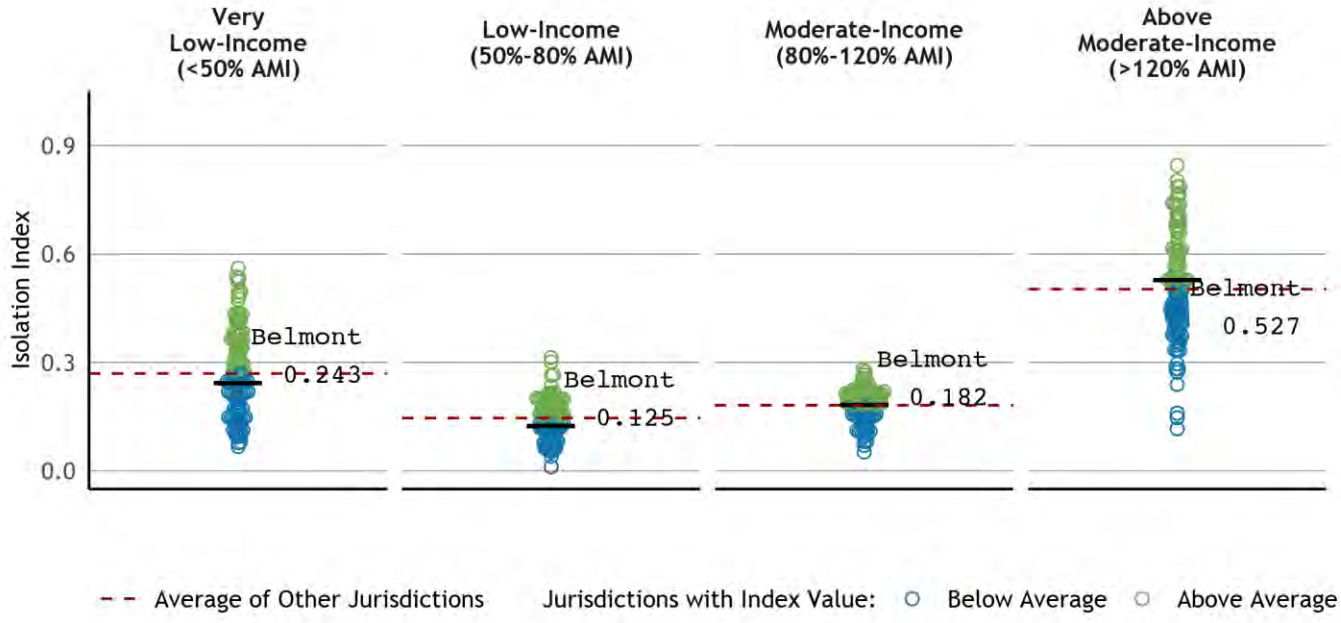


Figure 9: Income Group Isolation Index Values for Belmont Compared to Other Bay Area Jurisdictions (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

Table 7 below provides the dissimilarity index values indicating the level of segregation in Belmont between residents who are lower-income (earning less than 80% of AMI) and those who are not lower-income (earning above 80% of AMI). This data aligns with the requirements described in HCD's AFFH Guidance Memo for identifying dissimilarity for lower-income households.[14] Segregation in Belmont between lower-income residents and residents who are not lower-income increased between 2010 and 2015. Additionally, Table 7 shows dissimilarity index values for the level of segregation in Albany between residents who are very low-income (earning less than 50% of AMI) and those who are above moderate-income (earning above 120% of AMI). This supplementary data point provides additional nuance to an analysis of income segregation, as this index value indicates the extent to which a jurisdiction's lowest and highest income residents live in separate neighborhoods.

Similar to other tables in this report, the "Bay Area Average" column shows the average dissimilarity index values for these income group pairings across Bay Area jurisdictions in 2015. For example, Table 7 indicates that the average dissimilarity index between lower-income residents and other residents in a Bay Area jurisdiction is 0.198, so on average 19.8% of lower-income residents in a Bay Area jurisdiction would need to move to a different neighborhood within the jurisdiction to create perfect income group integration in that jurisdiction.

[14] For more information, see page 32 of HCD's AFFH Guidance Memo.

In 2015, the income segregation in Belmont between lower-income residents and other residents was higher than the average value for Bay Area jurisdictions (See Table 7). This means that the lower-income residents are more segregated from other residents within Belmont compared to other Jurisdictions in the region.

Table 7: Income Group Dissimilarity Index Values for Segregation within Belmont

	Belmont		Bay Area Average
Income Group	**2010**	**2015**	**2015**
Below 80% AMI vs. Above 80% AMI	0.188	0.244	0.198
Below 50% AMI vs. Above 120% AMI	0.209	0.237	0.253

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 10 below shows how dissimilarity index values for income segregation in Belmont compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each income group pairing, the spread of dots represents the range of dissimilarity index values among Bay Area jurisdictions. Additionally, the black line within each income group pairing notes the dissimilarity index value in Belmont, and each dashed red line represents the Bay Area average for the dissimilarity index for that pairing. Local staff can use this chart to contextualize how segregation levels between lower-income residents and wealthier residents in their jurisdiction compared to the rest of the region.

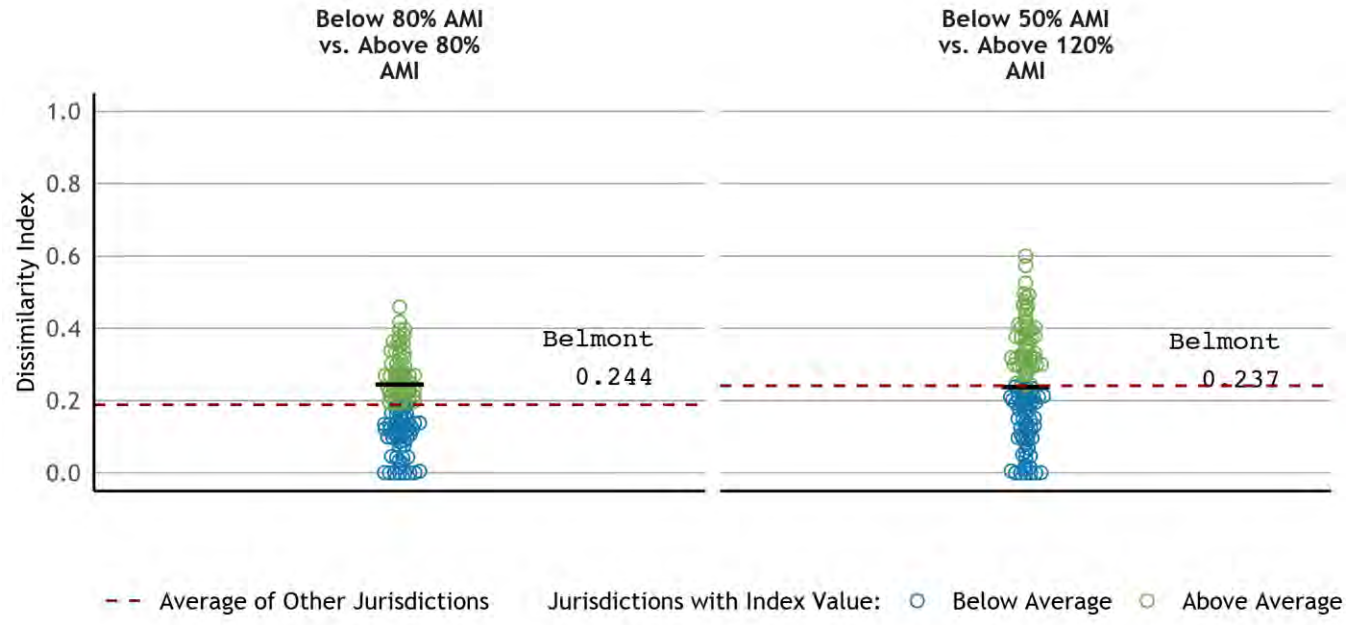


Figure 10: Income Group Dissimilarity Index Values for Belmont Compared to Other Bay Area Jurisdictions (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

The Theil's H Index values for neighborhood income group segregation in Belmont for the years 2010 and 2015 can be found in Table 8 below. The "Bay Area Average" column in this table provides the average Theil's H Index value across Bay Area jurisdictions for different income groups in 2015. By 2015, the Theil's H Index value for income segregation in Belmont was more than it had been in 2010. In 2015, the Theil's H Index value for income group segregation in Belmont was lower than the average value for Bay Area jurisdictions, indicating there is less neighborhood level income segregation in Belmont than in the average Bay Area city.

Table 8: Theil's H Index Values for Income Segregation within Belmont

	Belmont		Bay Area Average
Index	**2010**	**2015**	**2015**
Theil's H Multi-income	0.018	0.033	0.043

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 11 below shows how Theil's H index values for income group segregation in Belmont compare to values in other Bay Area jurisdictions in 2015. In this chart, each dot represents a Bay Area jurisdiction. Additionally, the black line notes the Theil's H index value for income group segregation in Belmont, and the dashed red line represents the average Theil's H index value across Bay Area jurisdictions. Local staff can use this chart to compare how neighborhood income group segregation levels in their jurisdiction compare to other jurisdictions in the region.

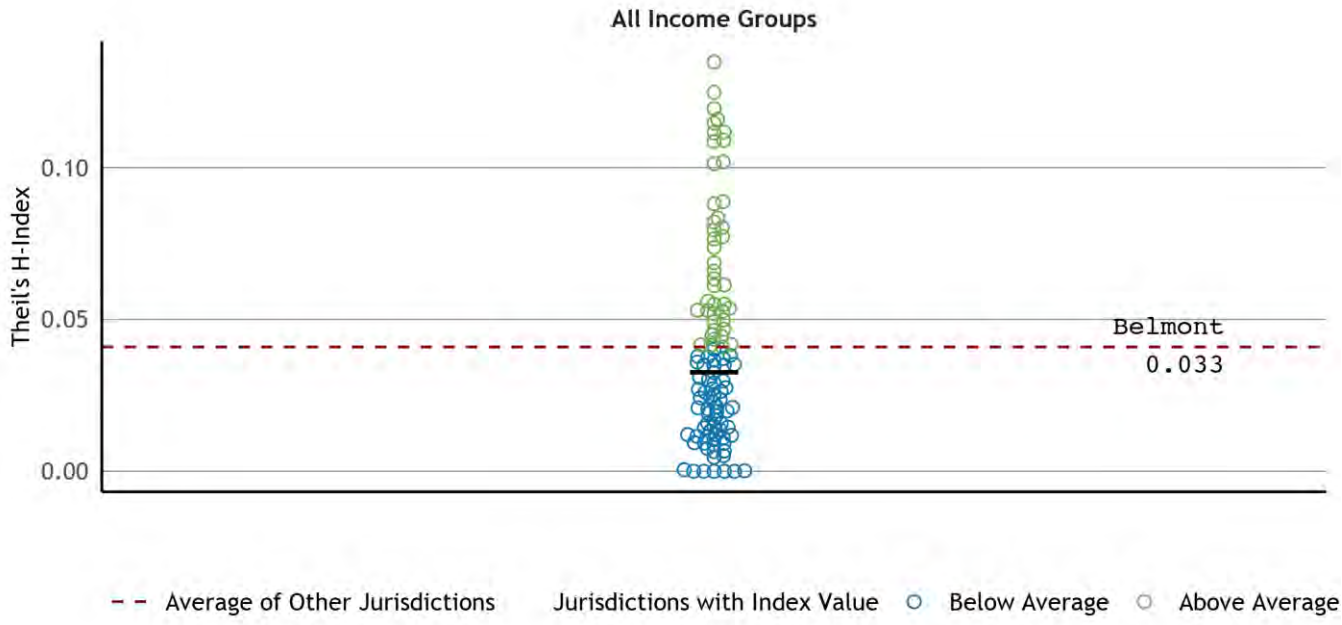


Figure 11: Income Group Theil's H Index Values for Belmont Compared to Other Bay Area Jurisdictions (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

3.2 Regional Income Segregation (*between* Belmont and other jurisdictions)

At the regional level, segregation is measured between jurisdictions instead of between neighborhoods. Income dot maps are not only useful for examining neighborhood income segregation within a jurisdiction, but these maps can also be used to explore income demographic differences between jurisdictions in the region. Figure 12 below presents an income dot map showing the spatial distribution of income groups in Belmont as well as in nearby Bay Area jurisdictions.

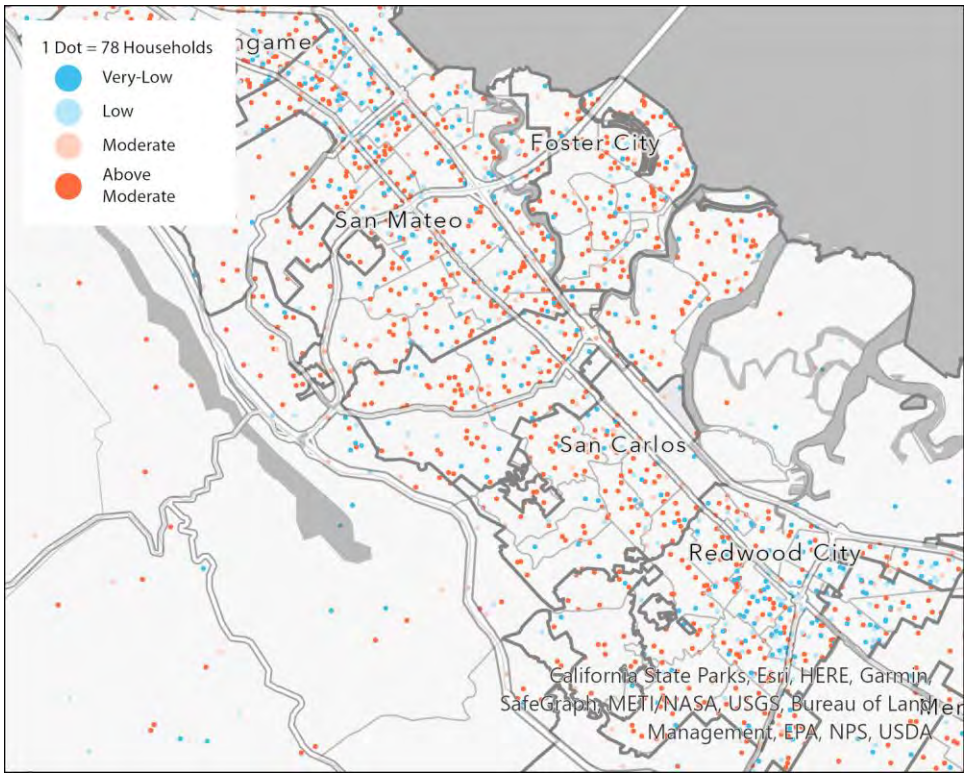


Figure 12: Income Dot Map of Belmont and Surrounding Areas (2015)

Universe: Population.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.
Note: The plot shows the income group distribution at the census block group level for City of Belmont and vicinity. Dots in each block group are randomly placed and should not be construed as actual placement of individuals.

When looking at income segregation between jurisdictions in the Bay Area, one can examine how Belmont differs from the region. The income demographics in Belmont for the years 2010 and 2015 can be found in Table 9 below. The table also provides the income composition of the nine-county Bay Area in 2015. As of that year, Belmont had a lower share of very low-income residents than the Bay Area as a whole, a lower share of low-income residents, a similar share of moderate-income residents, and a higher share of above moderate-income residents.

Table 9: Population by Income Group, Belmont and the Region

	Belmont		Bay Area
Income Group	**2010**	**2015**	**2015**
Very Low-Income (<50% AMI)	15.7%	21.99%	28.7%
Low-Income (50%-80% AMI)	13.56%	10.7%	14.3%
Moderate-Income (80%-120% AMI)	21.12%	17.12%	17.6%
Above Moderate-Income (>120% AMI)	49.62%	50.19%	39.4%

Universe: Population.
Source: Data for 2015 is from Housing U.S. Department of and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 13 below compares the income demographics in Belmont to other Bay Area jurisdictions.[15] Like the chart in Figure 3, each dot represents a Bay Area jurisdiction. For each income group, the spread of dots represents the range of that group's representation among Bay Area jurisdictions. The smallest range is among jurisdictions' moderate-income populations, while Bay Area jurisdictions vary the most in the share of their population that is above moderate-income. Additionally, the black lines within each income group note the percentage of Belmont population represented by that group and how that percentage ranks among other jurisdictions. Local staff can use this chart to compare the representation of different income groups in their jurisdiction to those groups' representation in other jurisdictions in the region, which can indicate the extent of segregation between this jurisdiction and the region.

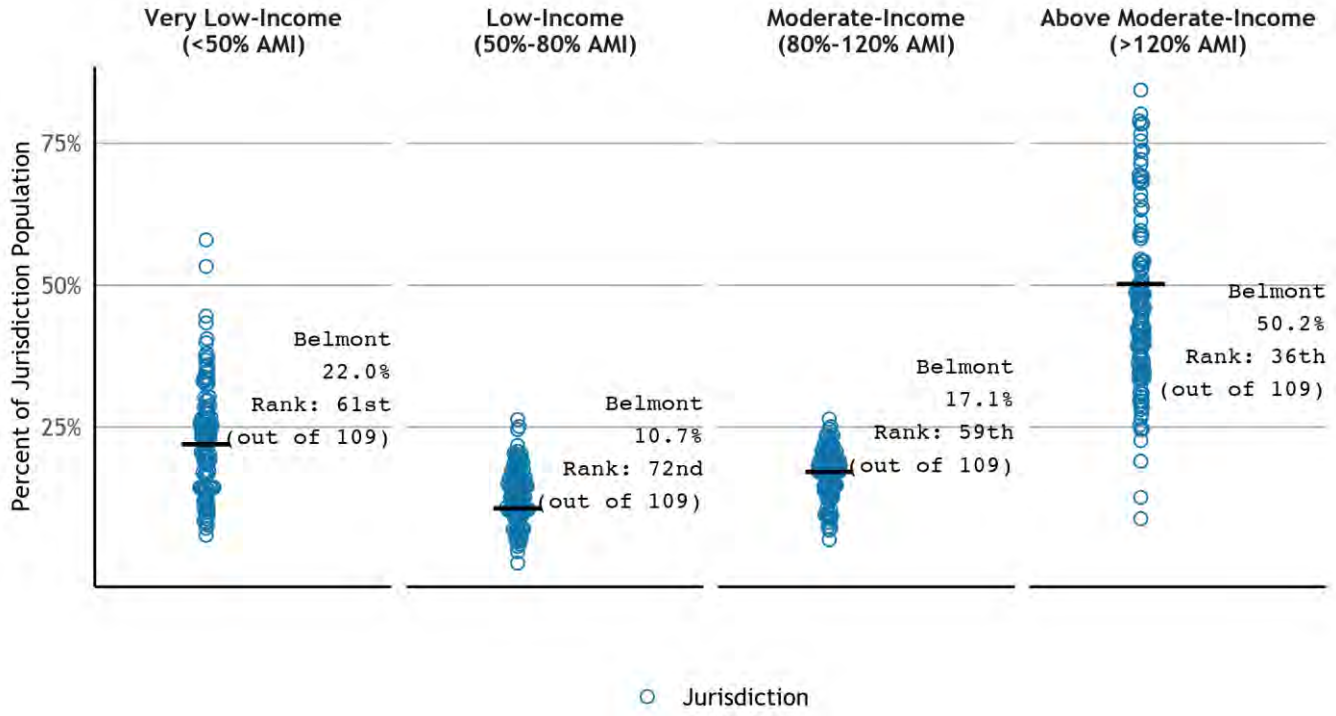


Figure 13: Income Demographics of Belmont Compared to Other Bay Area Jurisdictions (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

[15] While comparisons of segregation measures are made only using the 104 jurisdictions with more than one census tract, this comparison of jurisdiction level demographic data can be made using all 109 jurisdictions.

Income segregation between jurisdictions in the region can also be analyzed by calculating regional values for the segregation indices discussed previously. Similar to the regional racial segregation measures shown in Table 5, Table 10 presents dissimilarity index, isolation index, and Theil's H index values for income segregation for the entire nine-county Bay Area in 2010 and 2015. In the previous section of this report focused on neighborhood level income segregation, segregation indices were calculated by comparing the income demographics of the census tracts within a jurisdiction to the demographics of the jurisdiction as a whole. In Table 10, these measures are calculated by comparing the income demographics of local jurisdictions to the region's income group makeup. For example, looking at 2015 data, Table 10 shows the regional isolation index value for very low-income residents is 0.315 for 2015, meaning that on average very low-income Bay Area residents live in a jurisdiction that is 31.5% very low-income. The regional dissimilarity index for lower-income residents and other residents is 0.194 in 2015, which means that across the region 19.4% of lower-income residents would need to move to a different jurisdiction to create perfect income group integration in the Bay Area as a whole. The regional value for the Theil's H index measures how diverse each Bay Area jurisdiction is compared to the income group diversity of the whole region. A Theil's H Index value of 0 would mean all jurisdictions within the Bay Area have the same income demographics as the entire region, while a value of 1 would mean each income group lives exclusively in their own separate jurisdiction. The regional Theil's H index value for income segregation decreased slightly between 2010 and 2015, meaning that income groups in the Bay Area are now slightly less separated by the borders between jurisdictions.

Table 10: Regional Income Segregation Measures

Index	Group	2010	2015
Isolation Index Regional Level	Very Low-Income (<50% AMI)	0.277	0.315
	Low-Income (50%-80% AMI)	0.157	0.154
	Moderate-Income (80%-120% AMI)	0.185	0.180
	Above Moderate-Income (>120% AMI)	0.467	0.435
Dissimilarity Index Regional Level	Below 80% AMI vs. Above 80% AMI	0.186	0.194
	Below 50% AMI vs. Above 120% AMI	0.238	0.248
Theil's H Multi-income	All Income Groups	0.034	0.032

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

4 APPENDIX 1: SUMMARY OF FINDINGS

4.1 Segregation in City of Belmont

- The isolation index measures the segregation of a single group, and the dissimilarity index measures segregation between two different groups. The Theil's H-Index can be used to measure segregation between all racial or income groups across the city at once.
- As of 2020, white residents are the most segregated compared to other racial groups in Belmont, as measured by the isolation index. White residents live in neighborhoods where they are less likely to come into contact with other racial groups.
- Among all racial groups, the white population's isolation index value has changed the most over time, becoming less segregated from other racial groups between 2000 and 2020.
- According to the dissimilarity index, within Belmont the highest level of racial segregation is between Black and white residents.[16] However, local jurisdiction staff should note that this dissimilarity index value is not a reliable data point due to small population size.
- According to the Theil's H-Index, neighborhood racial segregation in Belmont declined between 2010 and 2020. Neighborhood income segregation increased between 2010 and 2015.
- Above Moderate-income residents are the most segregated compared to other income groups in Belmont. Above Moderate-income residents live in neighborhoods where they are less likely to encounter residents of other income groups.
- Among all income groups, the Very Low-income population's segregation measure has changed the most over time, becoming more segregated from other income groups between 2010 and 2015.
- According to the dissimilarity index, segregation between lower-income residents and residents who are not lower-income has increased between 2010 and 2015. In 2015, the income segregation in Belmont between lower-income residents and other residents was higher than the average value for Bay Area jurisdictions.

4.2 Segregation Between City of Belmont and Other jurisdictions in the Bay Area Region

- Belmont has a higher share of white residents than other jurisdictions in the Bay Area as a whole, a lower share of Latinx residents, a lower share of Black residents, and a higher share of Asian/Pacific Islander residents.

[16] The analysis conducted for this report suggests that dissimilarity index values are unreliable for a population group if that group represents approximately less than 5% of the jurisdiction's total population. ABAG/MTC recommends that when cities have population groups that are less than 5% of the jurisdiction's population (see Table 15 in Appendix 2), jurisdiction staff could focus on the isolation index or Thiel's H-Index to gain a more accurate understanding of neighborhood-level racial segregation in their jurisdiction.

- Regarding income groups, Belmont has a lower share of very low-income residents than other jurisdictions in the Bay Area as a whole, a lower share of low-income residents, a similar share of moderate-income residents, and a higher share of above moderate-income residents.

5 APPENDIX 2: SEGREGATION DATA

Appendix 2 combines tabular data presented throughout this report into a more condensed format. This data compilation is intended to enable local jurisdiction staff and their consultants to easily reference this data and re-use the data in the Housing Element or other relevant documents/analyses.

Table 11 in this appendix combines data from Table 1, Table 2, and Table 3 in the body of the report. Table 12 in this appendix combines data from Table 6, Table 7, and Table 8 in the body of the report. Table 13 represents a duplication of Table 5 in the body of the report; Table 14 represents a duplication of Table 10 in the body of the report; Table 15 in this appendix represents a duplication of Table 4 in the body of the report, while Table 16 represents a duplication of Table 9 in the body of the report.

Table 11: Neighborhood Racial Segregation Levels in Belmont

		Belmont			Bay Area Average
Index	**Race**	**2000**	**2010**	**2020**	**2020**
Isolation	Asian/Pacific Islander	0.166	0.215	0.302	0.245
	Black/African American	0.016	0.018	0.014	0.053
	Latinx	0.092	0.124	0.130	0.251
	White	0.712	0.624	0.485	0.491
Dissimilarity	Asian/Pacific Islander vs. White	0.161	0.156	0.088	0.185
	Black/African American vs. White	0.151*	0.175*	0.165*	0.244
	Latinx vs. White	0.151	0.142	0.119	0.207
	People of Color vs. White	0.141	0.139	0.087	0.168
Theil's H Multi-racial	All	0.014	0.015	0.007	0.042

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, 2010 Census of Population and Housing, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.
Note: If a number is marked with an asterisk (*), it indicates that the index is based on a racial group making up less than 5 percent of the jurisdiction population, leading to unreliable numbers.

Table 12: Neighborhood Income Segregation Levels in Belmont

		Belmont		Bay Area Average
Index	**Income Group**	**2010**	**2015**	**2015**
Isolation	Very Low-Income (<50% AMI)	0.173	0.243	0.269
	Low-Income (50%-80% AMI)	0.146	0.125	0.145
	Moderate-Income (80%-120% AMI)	0.213	0.182	0.183
	Above Moderate-Income (>120% AMI)	0.513	0.527	0.507
Dissimilarity	Below 80% AMI vs. Above 80% AMI	0.188	0.244	0.198
	Below 50% AMI vs. Above 120% AMI	0.209	0.237	0.253
Theil's H Multi-racial	All	0.018	0.033	0.043

Universe: Population.
Source: Income data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Table 13: Regional Racial Segregation Measures

Index	Group	2010	2020
Isolation Index Regional Level	Asian/Pacific Islander	0.317	0.378
	Black/African American	0.144	0.118
	Latinx	0.283	0.291
	White	0.496	0.429
	People of Color	0.629	0.682
Dissimilarity Index Regional Level	Asian/Pacific Islander vs. White	0.384	0.369
	Black/African American vs. White	0.475	0.459
	Latinx vs. White	0.301	0.297
	People of Color vs. White	0.296	0.293
Theil's H Multi-racial	All Racial Groups	0.103	0.097

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, 2010 Census of Population and Housing, Table P4.

Table 14: Regional Income Segregation Measures

Index	Group	2010	2015
Isolation Index Regional Level	Very Low-Income (<50% AMI)	0.277	0.315
	Low-Income (50%-80% AMI)	0.157	0.154
	Moderate-Income (80%-120% AMI)	0.185	0.180
	Above Moderate-Income (>120% AMI)	0.467	0.435
Dissimilarity Index Regional Level	Below 80% AMI vs. Above 80% AMI	0.186	0.194
	Below 50% AMI vs. Above 120% AMI	0.238	0.248
Theil's H Multi-income	All Income Groups	0.034	0.032

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Table 15: Population by Racial Group, Belmont and the Region

	Belmont			Bay Area
Race	**2000**	**2010**	**2020**	**2020**
Asian/Pacific Islander	15.3%	20.44%	29.86%	35.8%
Black/African American	1.55%	1.56%	1.23%	5.6%
Latinx	8.32%	11.52%	12.43%	28.2%
Other or Multiple Races	4.4%	5.21%	8.58%	24.4%
White	70.44%	61.28%	47.9%	5.9%

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, 2010 Census of Population and Housing, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Table 16: Population by Income Group, Belmont and the Region

	Belmont		Bay Area
Income Group	**2010**	**2015**	**2015**
Very Low-Income (<50% AMI)	15.7%	21.99%	28.7%
Low-Income (50%-80% AMI)	13.56%	10.7%	14.3%
Moderate-Income (80%-120% AMI)	21.12%	17.12%	17.6%
Above Moderate-Income (>120% AMI)	49.62%	50.19%	39.4%

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

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AFFH Attachment C.5.
Fair Housing Laws & Regulations

This appendix summarizes key state laws and regulations related to mitigating housing discrimination and expanding housing choice.

California Fair Employment and Housing Act (FEHA) (Part 2.8 (commencing with Section 12900) of Division 3 of Title 2) is the state fair housing law that prohibits those engaged in the housing business—landlords, real estate agents, home sellers, builders, mortgage lenders, and others—from discriminating against tenants or homeowners.

California law protects individuals from illegal discrimination by housing providers based on:

- Race, color
- Ancestry, national origin
- Citizenship, immigration status
- Primary language
- Age
- Religion
- Disability, mental or physical
- Sex, gender
- Gender identity, gender expression
- Marital status
- Familial status
- Source of income
- Military or veteran status

Government Code section 65008. Covers actions of a city, county, city and county, or other local government agency, and makes those actions null and void if the action denies an individual or group of individuals the enjoyment of residence, landownership, tenancy, or other land use in the state because of membership in a protected class, the method of financing, and/or the intended occupancy.

- For example, a violation under Government Code section 65008 may occur if a jurisdiction applied more scrutiny to reviewing and approving an affordable

development as compared to market-rate developments, or multifamily housing as compared to single family homes.

- Government Code section 65008, subdivision (e), authorizes preferential treatment of affordable housing

Government Code section 8899.50 requires all public agencies to administer programs and activities relating to housing and community development in a manner to affirmatively further fair housing and avoid any action that is materially inconsistent with its obligation to affirmatively further fair housing.

Government Code section 11135 et seq. requires full and equal access to all programs and activities operated, administered, or funded with financial assistance from the state, regardless of one's membership or perceived membership in a protected class.

Density Bonus Law (Gov. Code, section 65915) requires California jurisdictions to adopt ordinances that specify how density bonuses will be offered to incentivize affordable housing. The state law contains the minimum specifications for density bonuses.

Housing Accountability Act (Gov. Code, section 65589.5) prohibits local agencies from disapproving housing developments, including farmworker housing and emergency shelters, or requiring conditions that make such housing infeasible except under certain conditions specified in the law.

No-Net-Loss Law (Gov. Code, section 65863) is meant to ensure that development opportunities remain available throughout a jurisdiction's regional housing need allocation (RHNA) period, especially for low and moderate income households. It prohibits jurisdictions from lowering residential densities without substantial evidence.

Least Cost Zoning Law (Gov. Code, section 65913.1) requires jurisdictions to designate and zone sufficient vacant land for residential use with sufficient standards in relation to growth projections.

Excessive subdivision standards (Gov. Code, section 65913.2) prohibits jurisdictions from imposing design criteria that make residential development infeasible.

Limits on growth controls (Gov. Code, section 65302.8) describes how flood plains are used in comprehensive planning and zoning.

Housing Element Law (Gov. Code, section 65583, esp. subds. (c) (5), (c) (10) governs state-required housing elements.

APPENDIX C.6. Belmont AFFH Maps and Data Packet

Figure I-1.
Fair Housing Assistance Organizations, San Mateo County

Name	Service Area	Address	Phone	Website
Project Sentinel	Northern California	1490 El Camino Real, Santa Clara, CA 95050	(800) 339-6043	https://www.housing.org/
Legal Aid Society of San Mateo County	San Mateo County	330 Twin Dolphin Drive, Suite 123, Redwood City, CA 94065	(650) 558-0915	https://www.legalaidsmc.org/housing-resources
Community Legal Services of East Palo Alto	East Palo Alto, Menlo Park, Burlingame, Mountain View, Redwood City, and San Francisco	1861 Bay Road, East Palo Alto, CA 94303	(650)-326-6440	https://clsepa.org/services/#housing

Source: Organization Websites

Figure I-2. Fair Housing Complaints Filed with HUD by Basis, San Mateo County, 2017-2021

Source: HUD

	2017	2018	2019	2020	2021	2017-2021 Total	
						Cases	% of Total
Disability	8	9	3	9	3	32	56%
Race	3	5	2	1		11	19%
Familial Status	4	3			1	8	14%
National Origin	2				1	3	5%
Religion		1		1		2	4%
Sex					1	1	2%
Total cases	17	18	5	11	6	57	100%

Figure I-3.
HCD Fair Housing Inquiries by City, January 2013-March 2021

Note:
Atherton, Brisbane, Colma, Hillsborough, Millbrae, and Portola Valley had no inquiries during this time.

Source:

California Department of Housing and Community Development

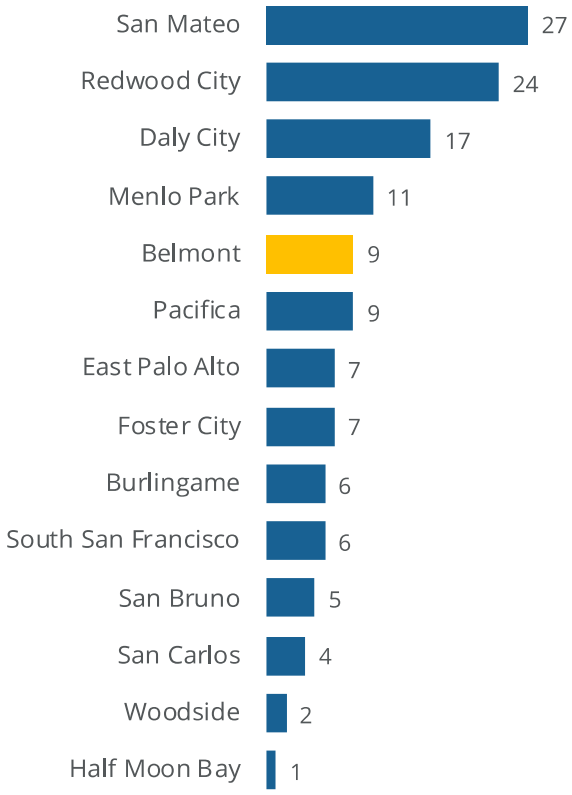
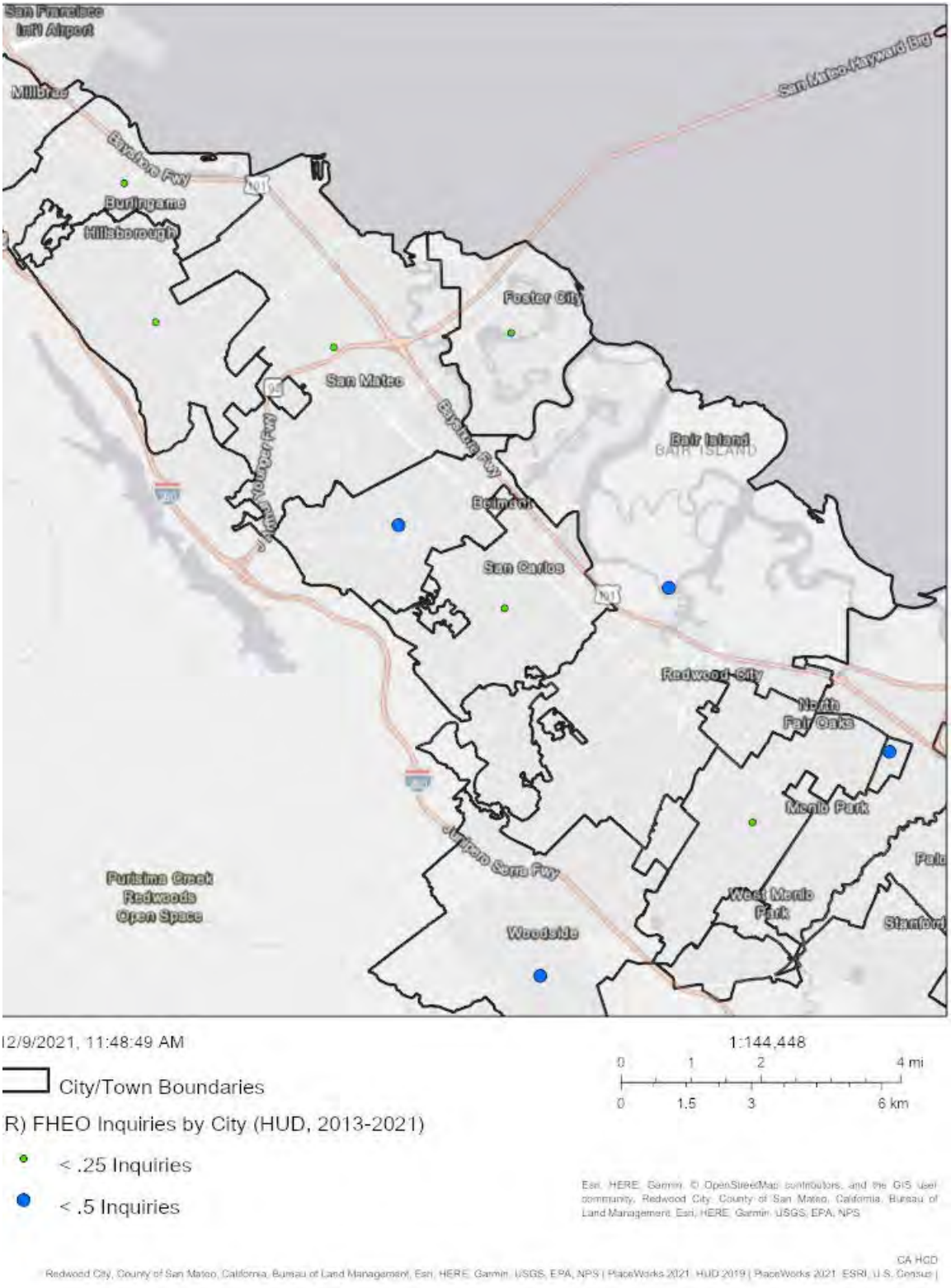


Figure I-4.
FHEO Inquiries by City to HCD, Belmont, 2013-2021



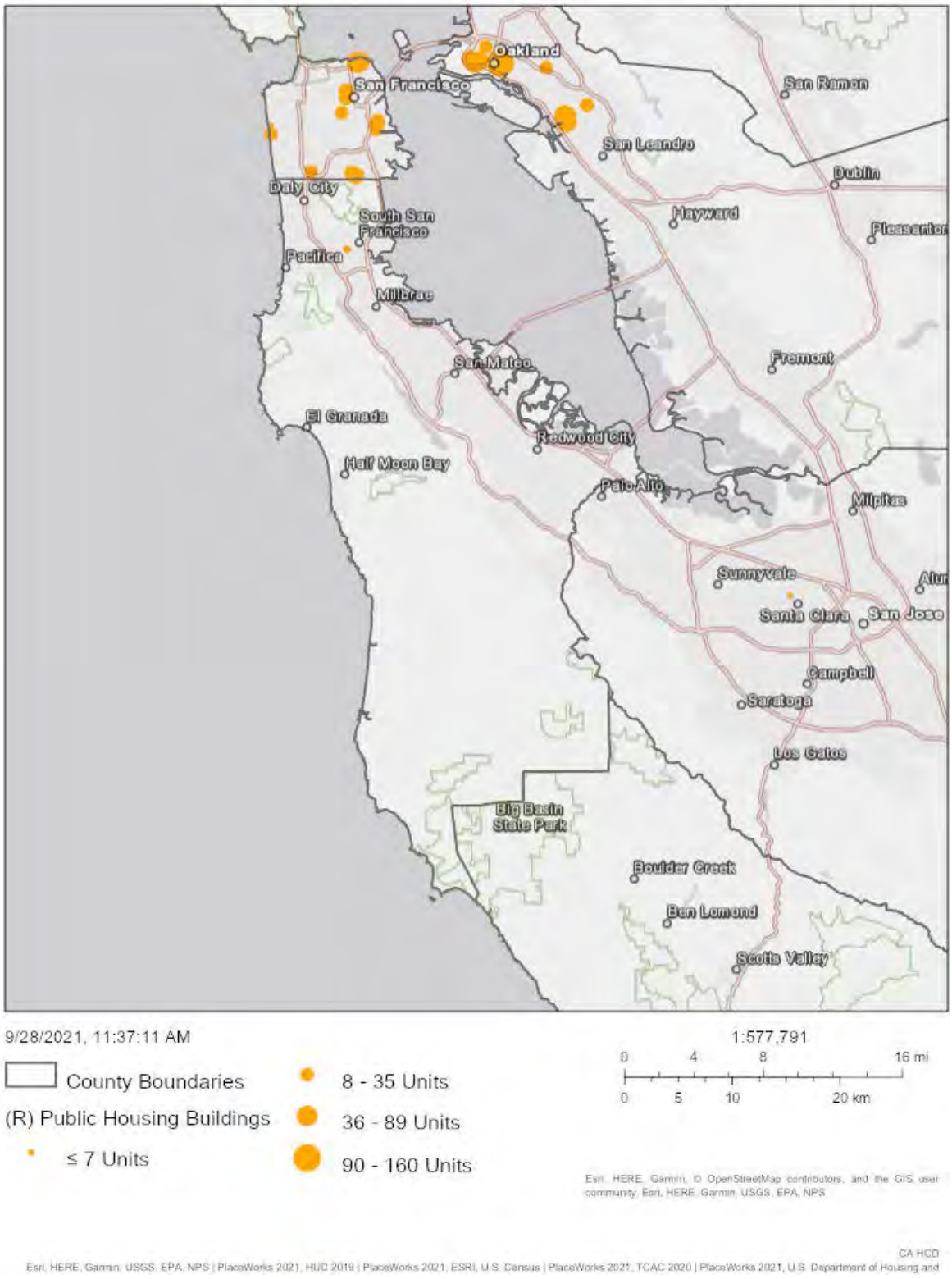
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure I-5.
HCD Fair Housing Inquiries by Bias, January 2013-March 2021

Jurisdiction	Disability	Race	Familial Status	National Origin	Religion	Sex	Color	None Cited	Total
Atherton	0	0	0	0	0	0	0	0	0
Belmont	2	0	1	0	0	0	0	6	9
Brisbane	0	0	0	0	0	0	0	0	0
Burlingame	3	0	2	0	0	0	0	1	6
Colma	0	0	0	0	0	0	0	0	0
Daly City	1	2	1	3	0	0	0	9	16
East Palo Alto	1	1	0	0	0	0	0	5	7
Foster City	4	0	0	0	0	0	0	3	7
Half Moon Bay	0	0	0	0	0	0	0	1	1
Hillsborough	0	0	0	0	0	0	0	0	0
Menlo Park	3	0	0	0	0	1	0	5	9
Millbrae	0	0	0	0	0	0	0	0	0
Pacifica	3	0	0	1	0	1	0	4	9
Portola Valley	0	0	0	0	0	0	0	0	0
Redwood City	5	1	1	1	0	1	0	15	24
San Bruno	0	0	0	0	0	0	0	5	5
San Carlos	1	0	1	0	0	0	0	2	4
San Mateo	4	2	2	2	0	0	0	16	26
South San Francisco	0	0	0	1	0	0	0	5	6
Woodside	0	0	0	0	0	0	0	2	2

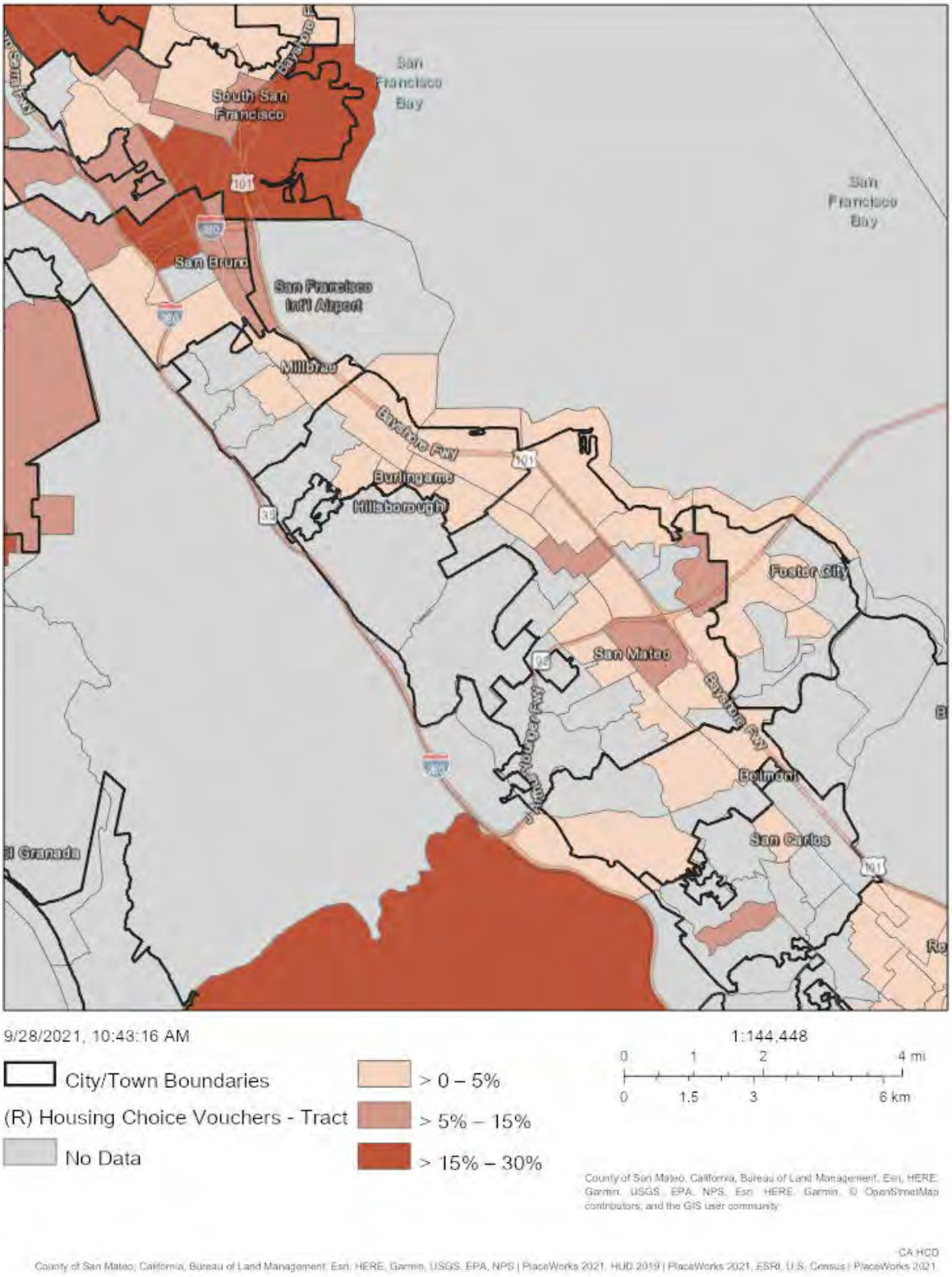
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure I-6.
Public Housing Buildings, San Mateo County



Source: California Department of Housing and Community Development AFFH Data Viewer

Figure I-7.
Housing Choice Vouchers by Census Tract

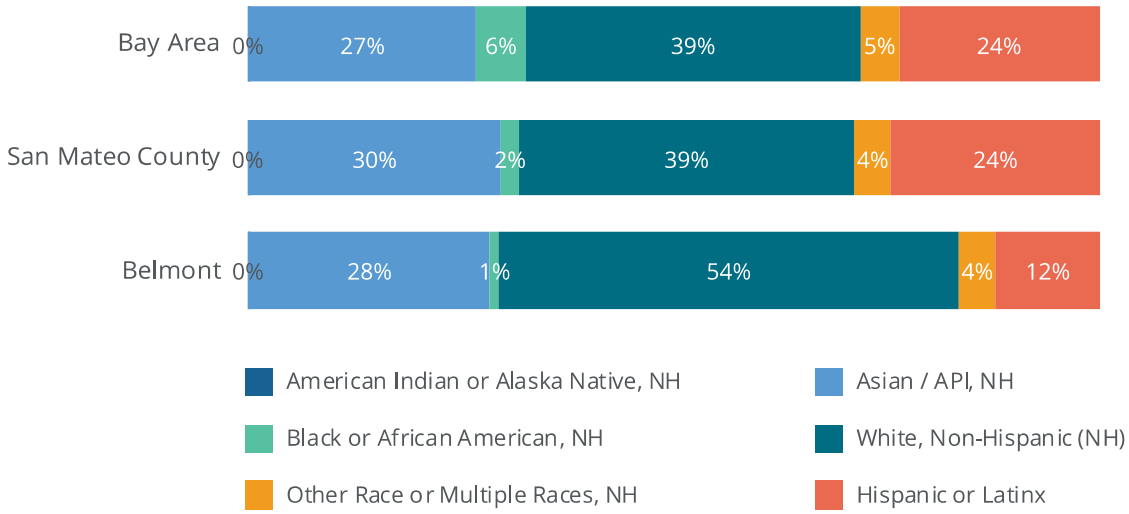


Source: California Department of Housing and Community Development AFFH Data Viewer

SECTION II. Integration and Segregation

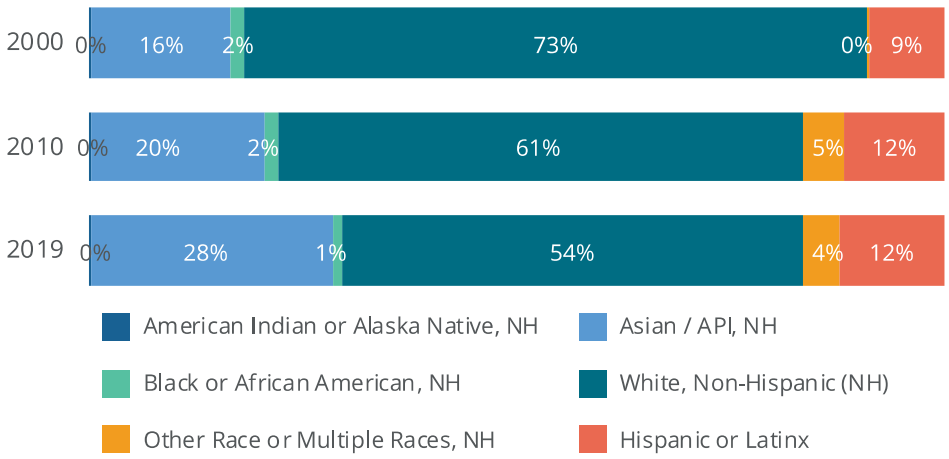
Race and ethnicity.

Figure II-1.
Population by Race and Ethnicity, 2019



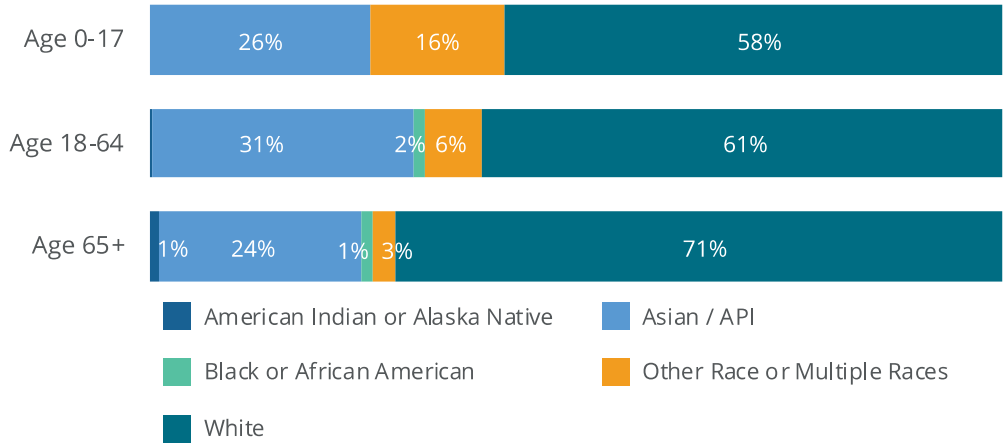
Source: ABAG Housing Needs Data Workbook

Figure II-2.
Population by Race and Ethnicity, Belmont, 2000-2019



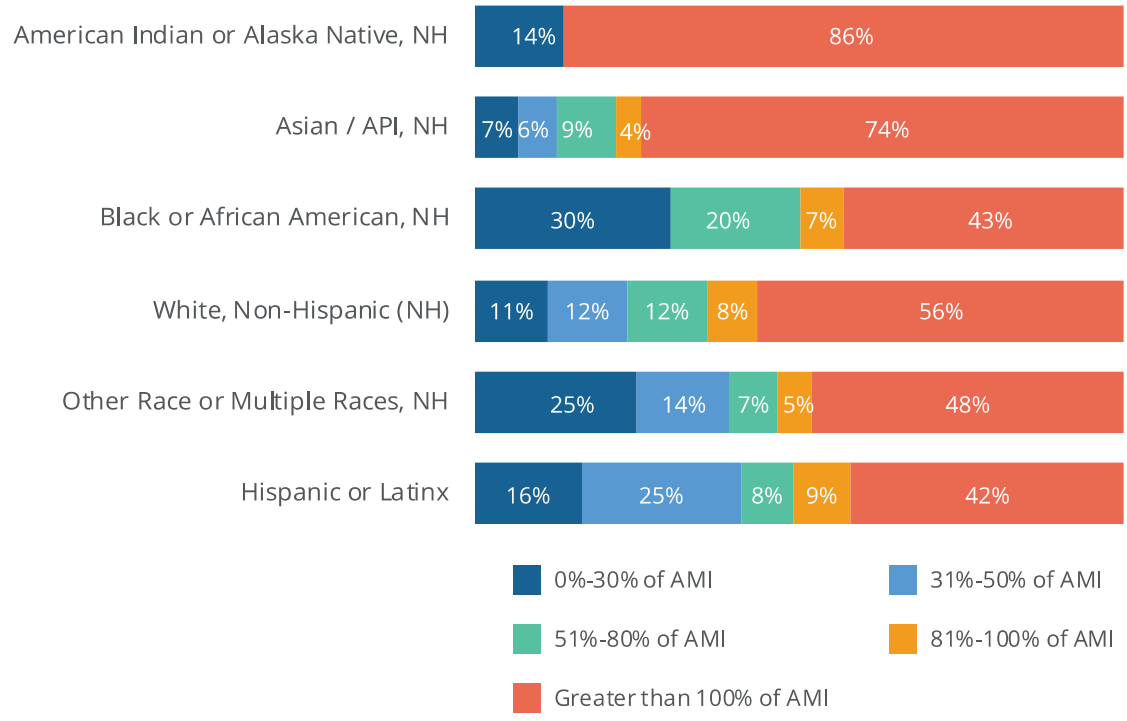
Source: ABAG Housing Needs Data Workbook

Figure II-3.
Senior and Youth Population by Race, Belmont, 2000-2019



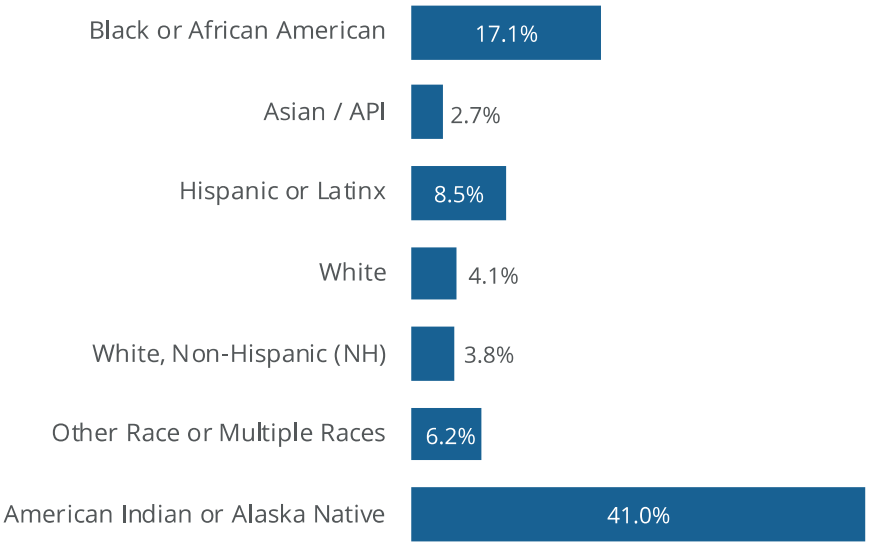
Source: ABAG Housing Needs Data Workbook

Figure II-4.
Area Median Income by Race and Ethnicity, Belmont, 2019



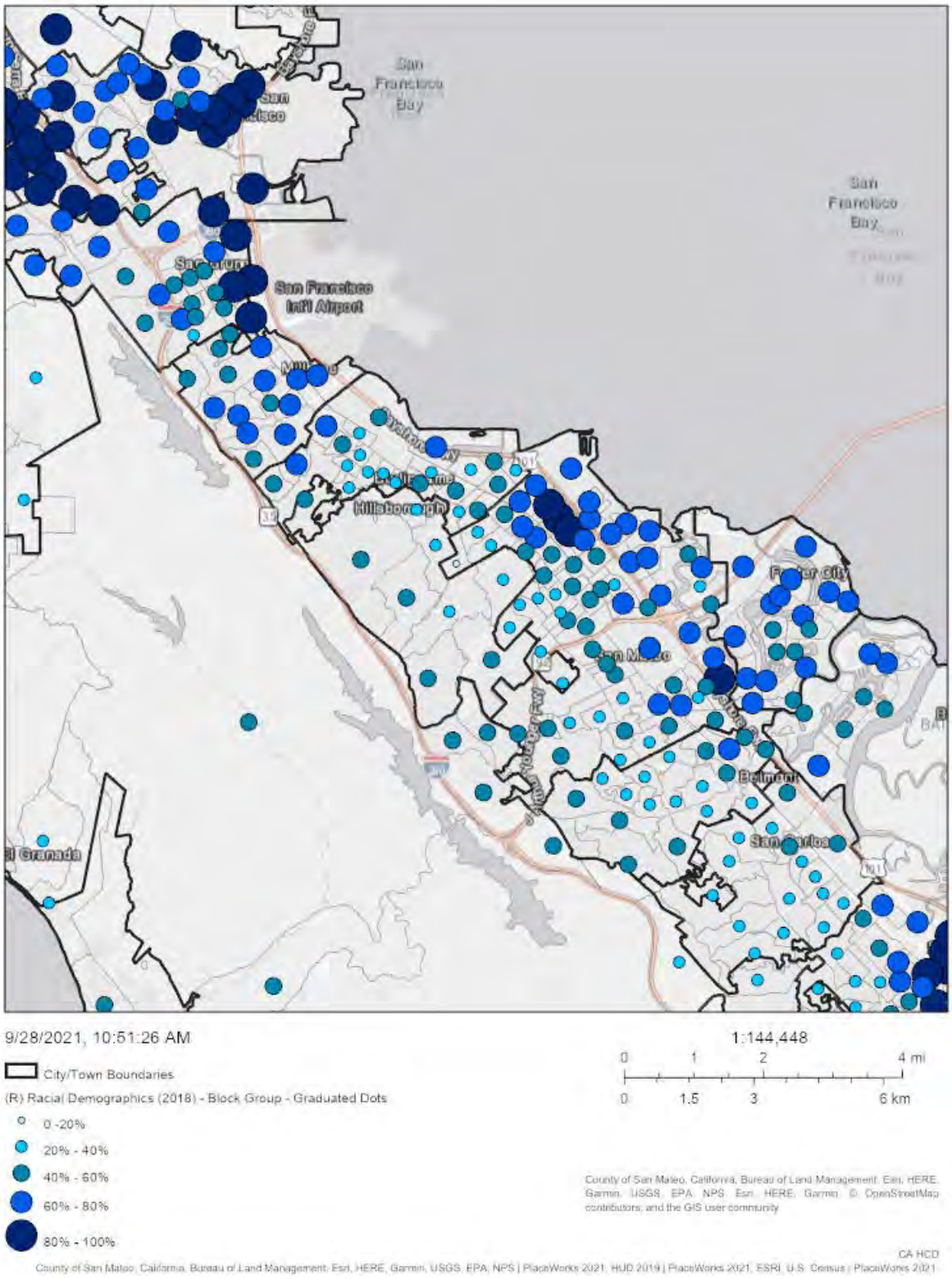
Source: ABAG Housing Needs Data Workbook

Figure II-5.
Poverty Rate by Race and Ethnicity, Belmont, 2019



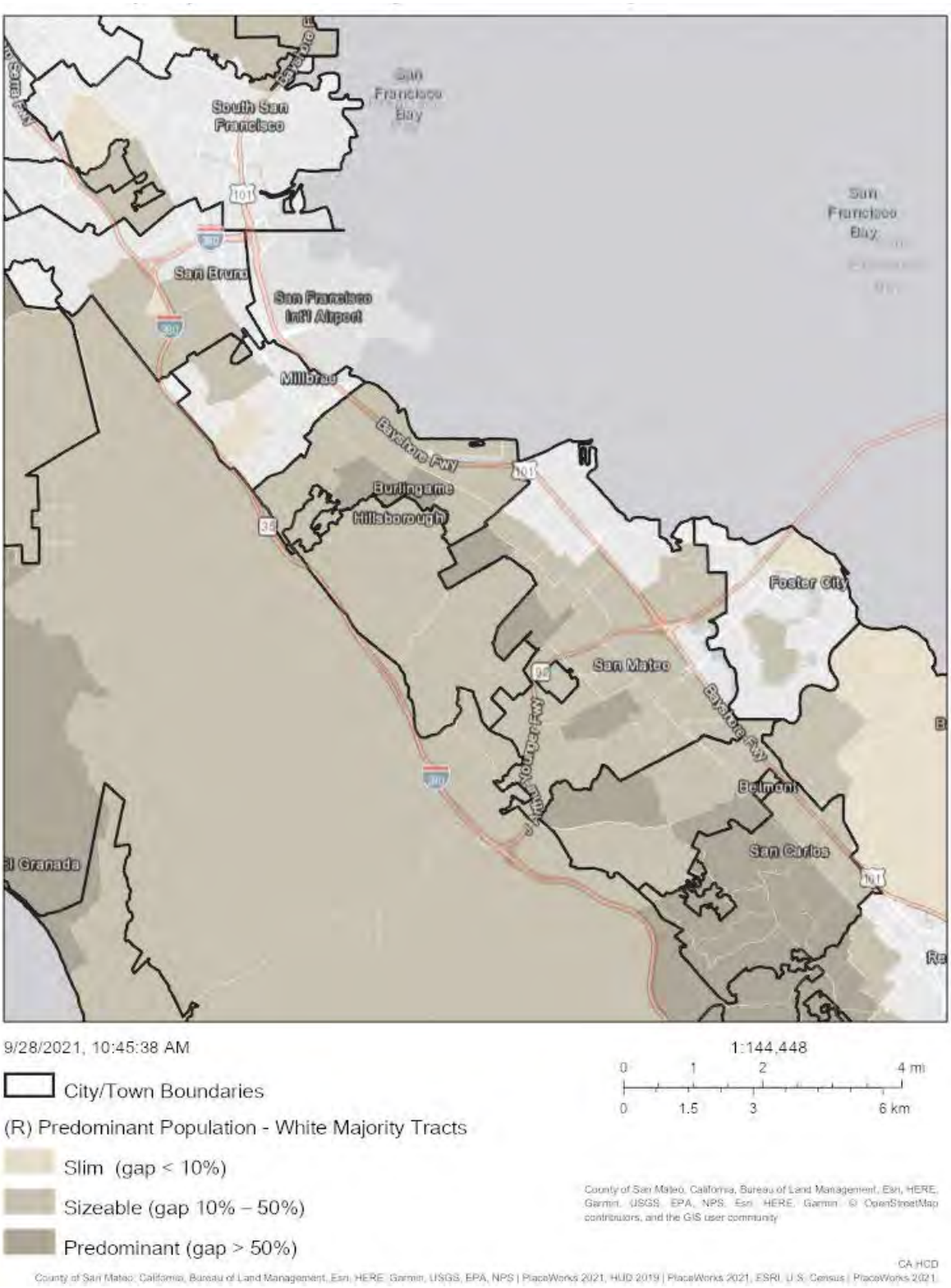
Source: ABAG Housing Needs Data Workbook

Figure II-6.
% Non-White Population by Census Block Groups, 2018



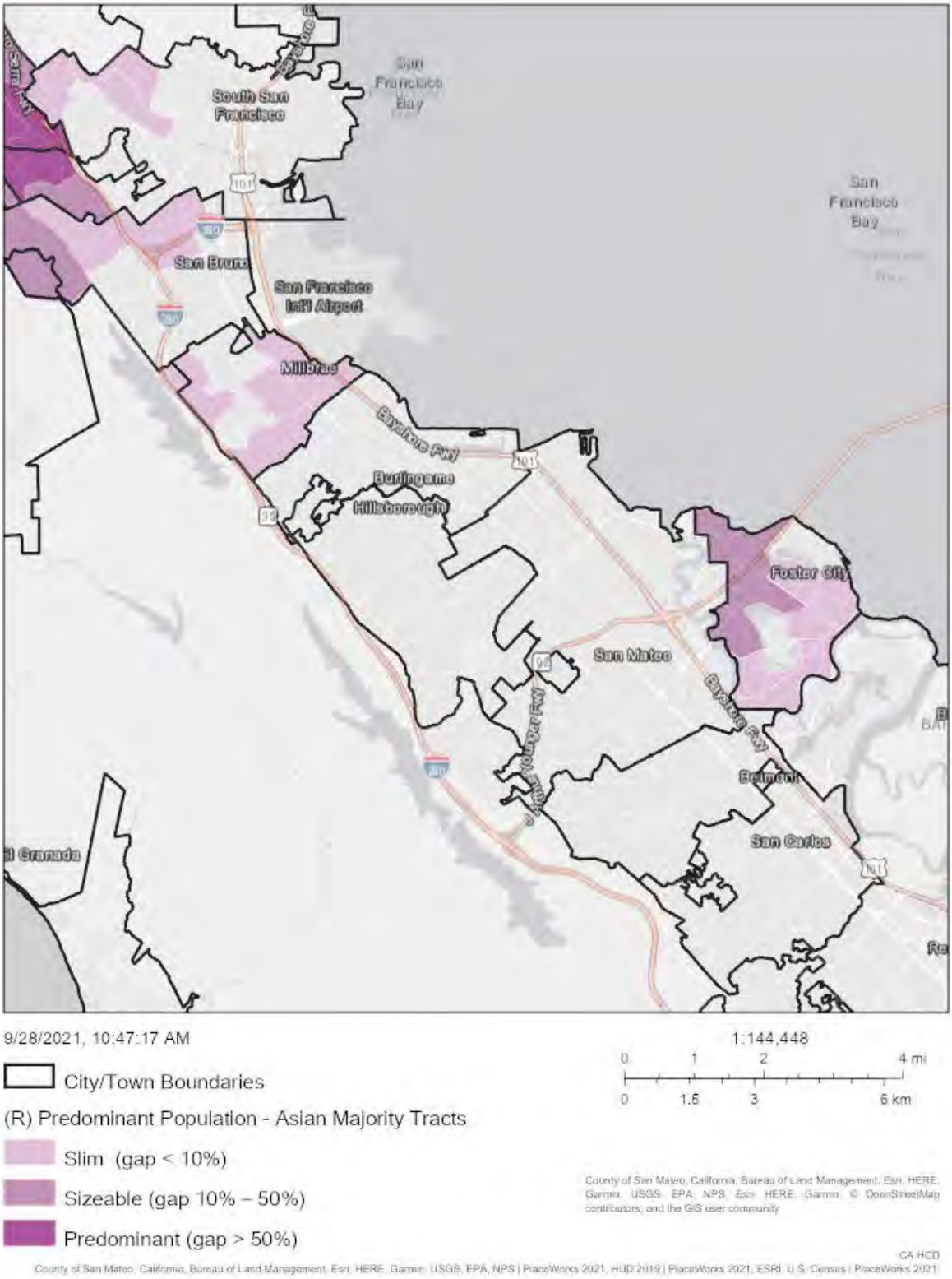
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-7.
White Majority Census Tracts



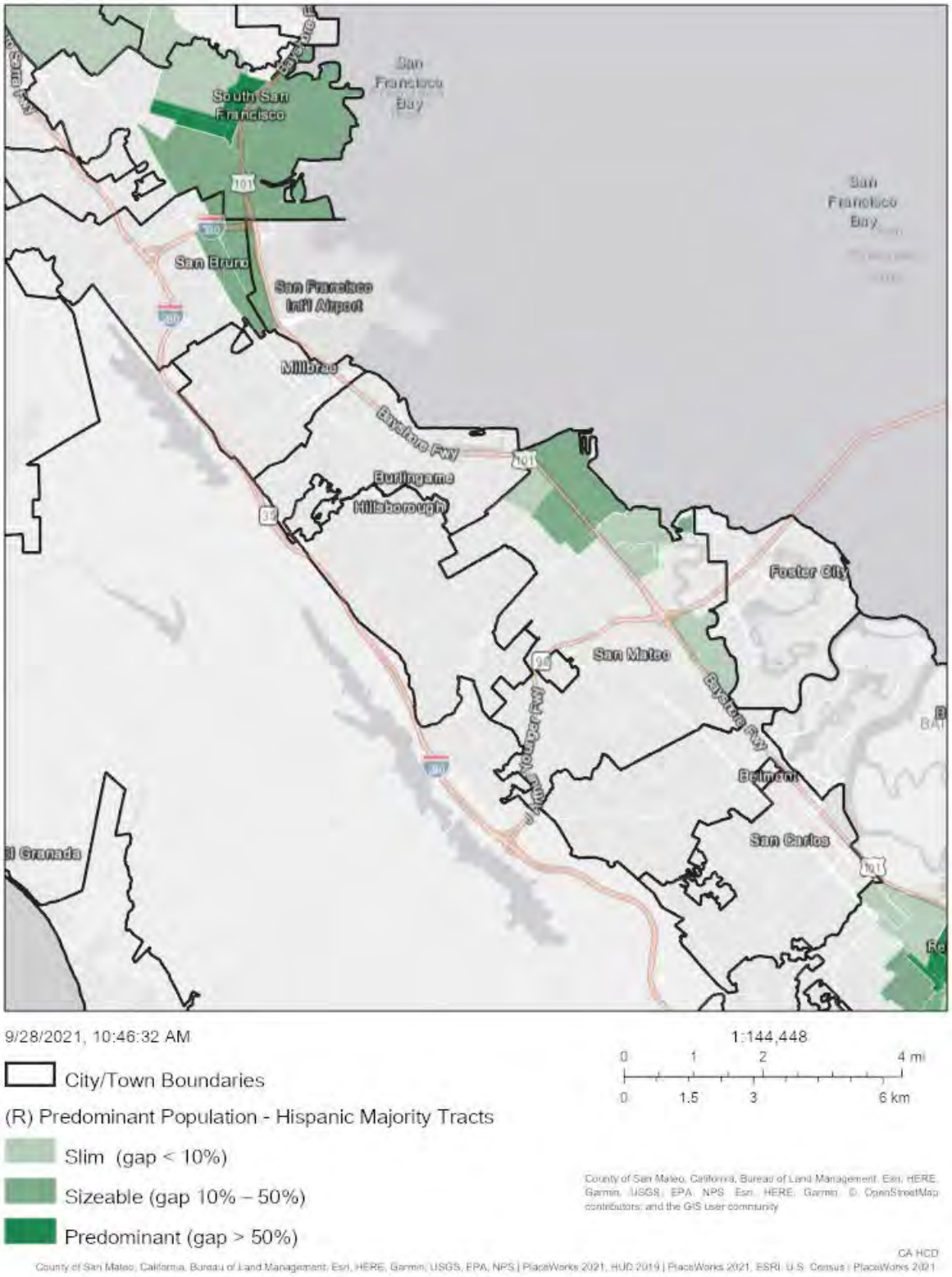
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-8.
Asian Majority Census Tracts



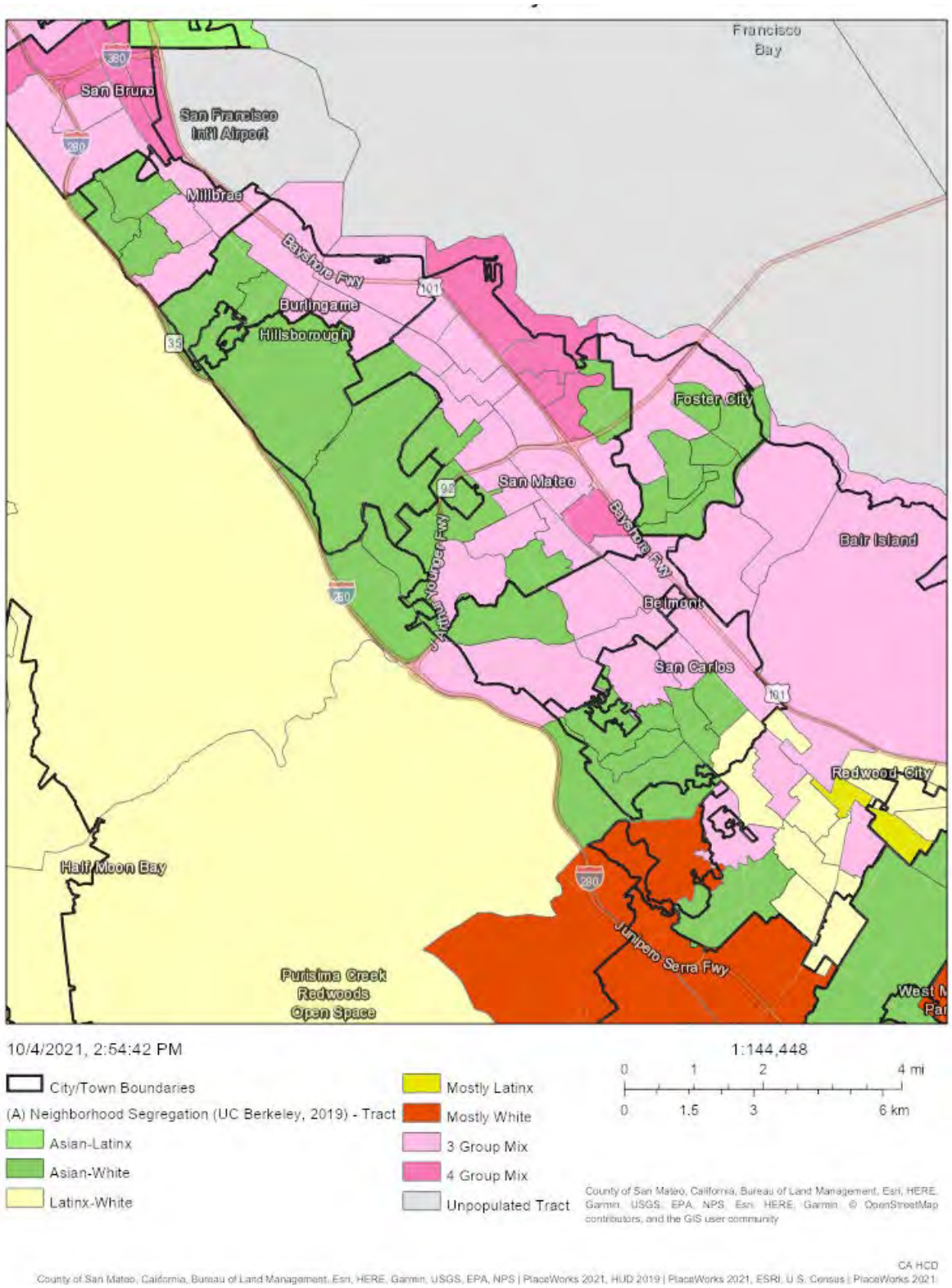
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-9.
Hispanic Majority Census Tracts



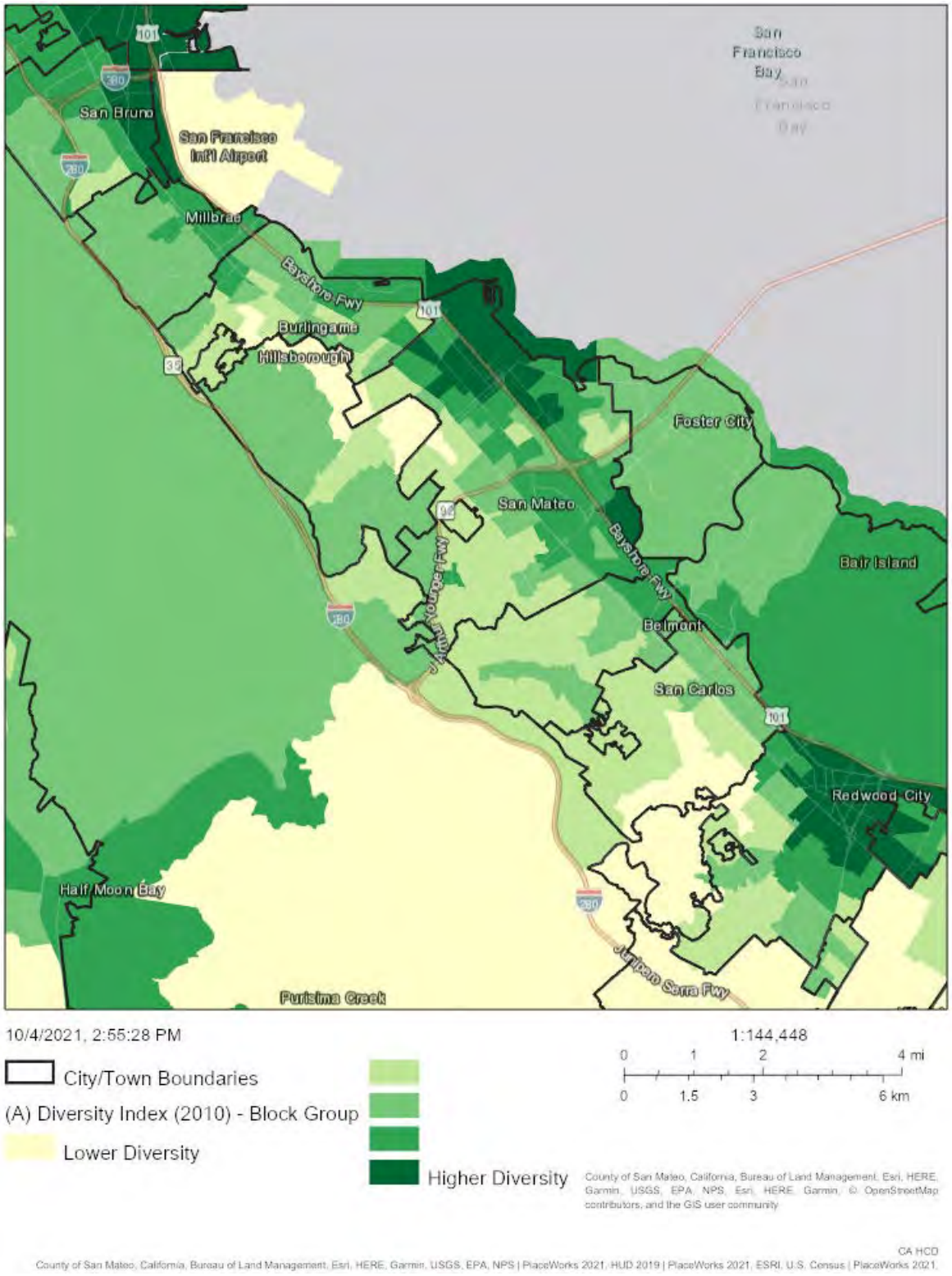
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-10.
Neighborhood Segregation by Census Tract, 2019



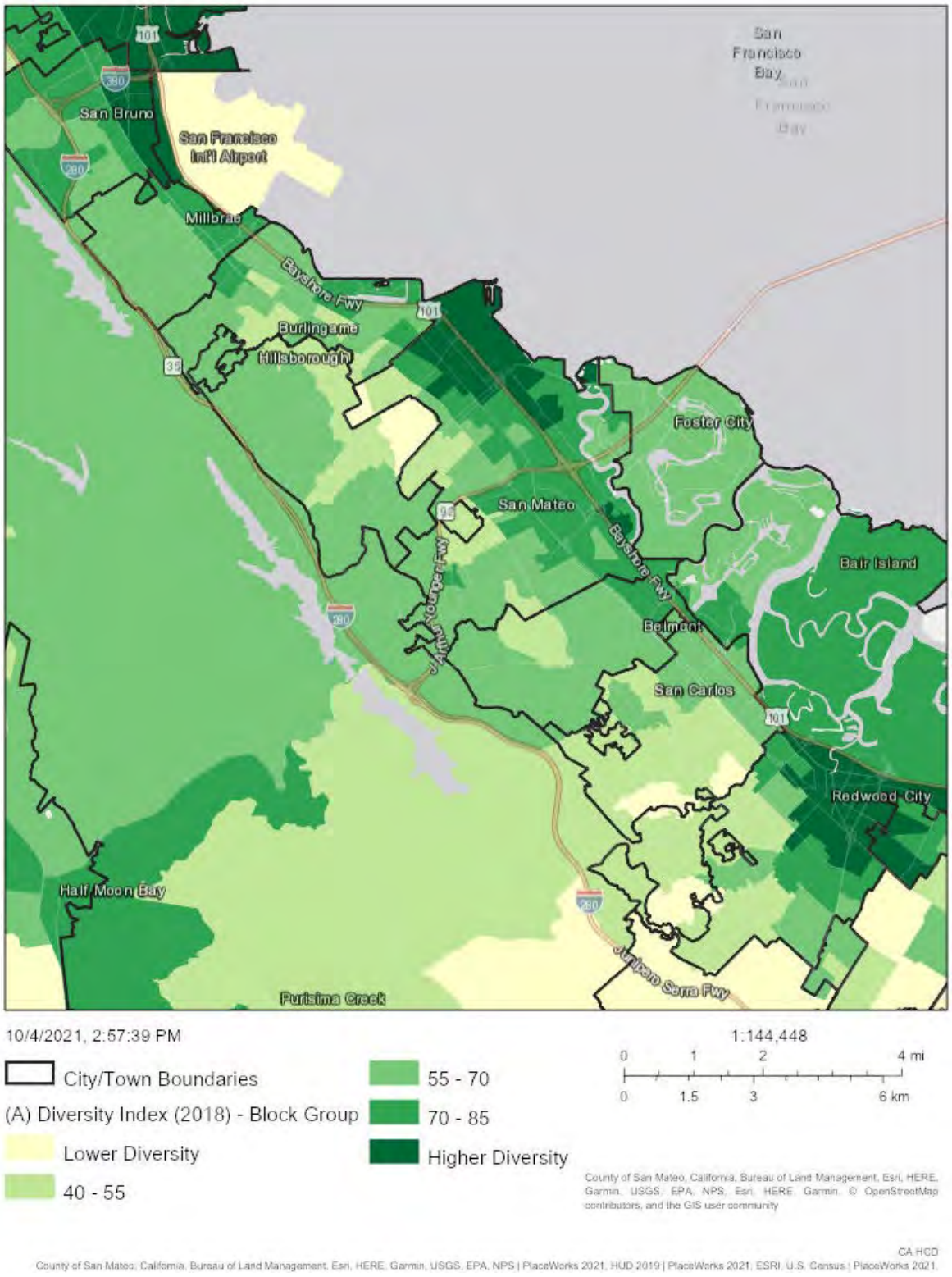
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-11.
Diversity Index by Block Group, 2010



Source: California Department of Housing and Community Development AFFH Data Viewer

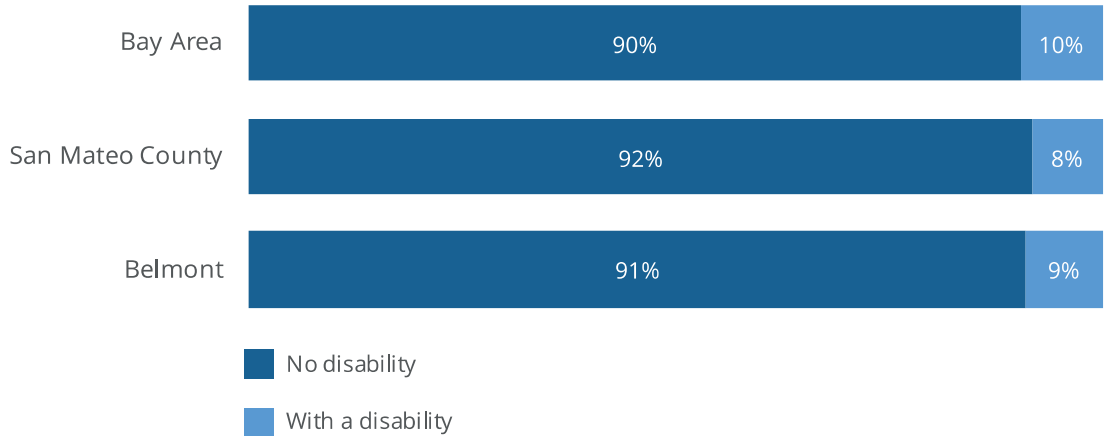
Figure II-12.
Diversity Index by Block Group, 2018



Source: California Department of Housing and Community Development AFFH Data Viewer

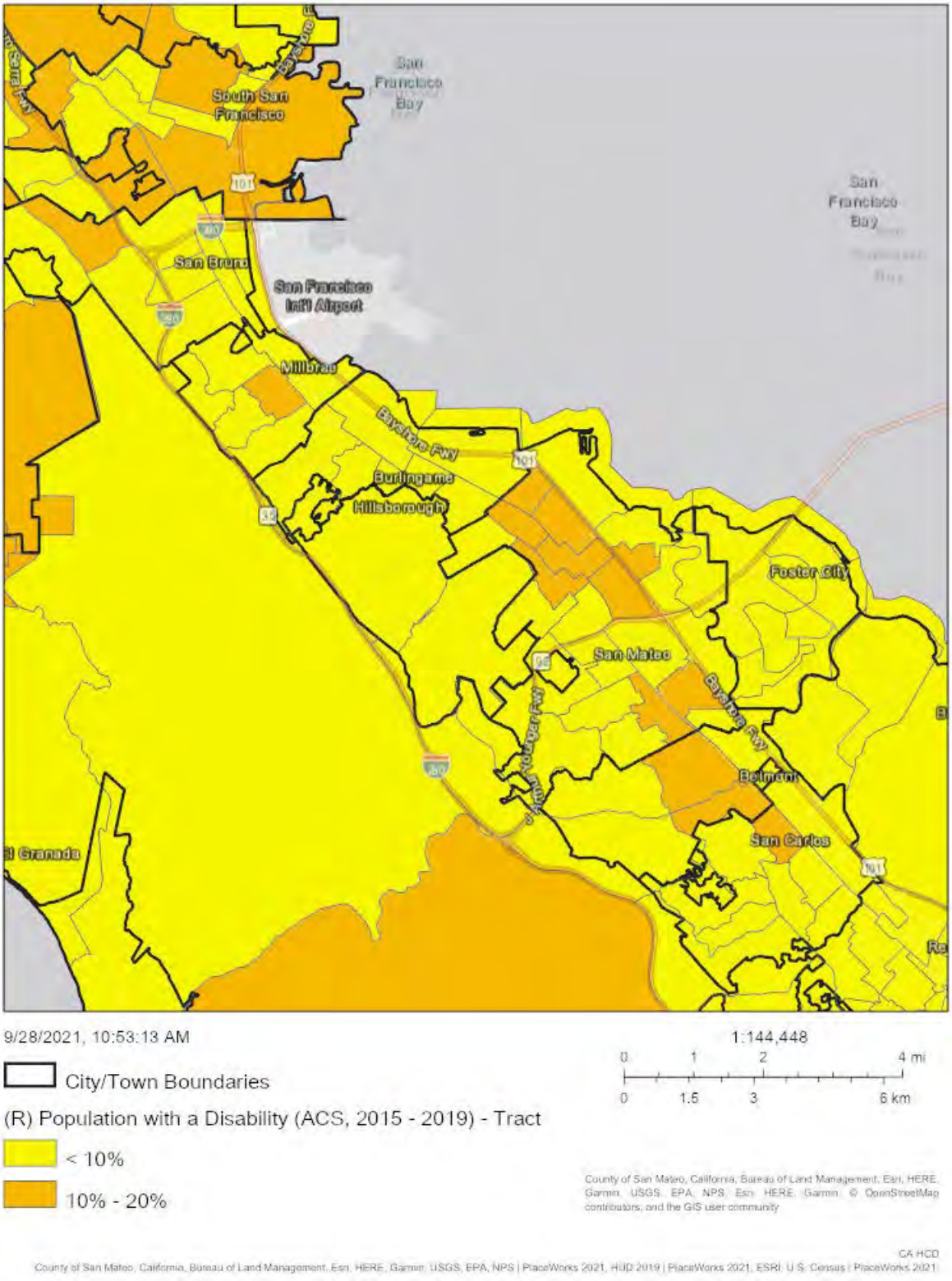
Disability status.

Figure II-13.
Share of Population by Disability Status, 2019



Source: ABAG Housing Needs Data Workbook

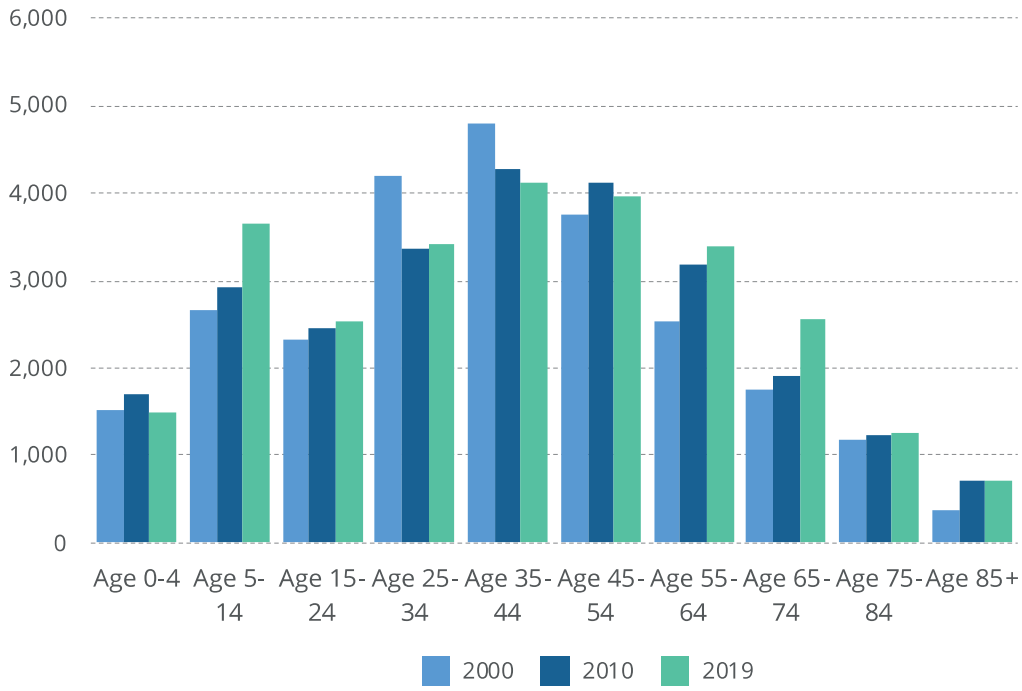
Figure II-14.
% of Population with a Disability by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

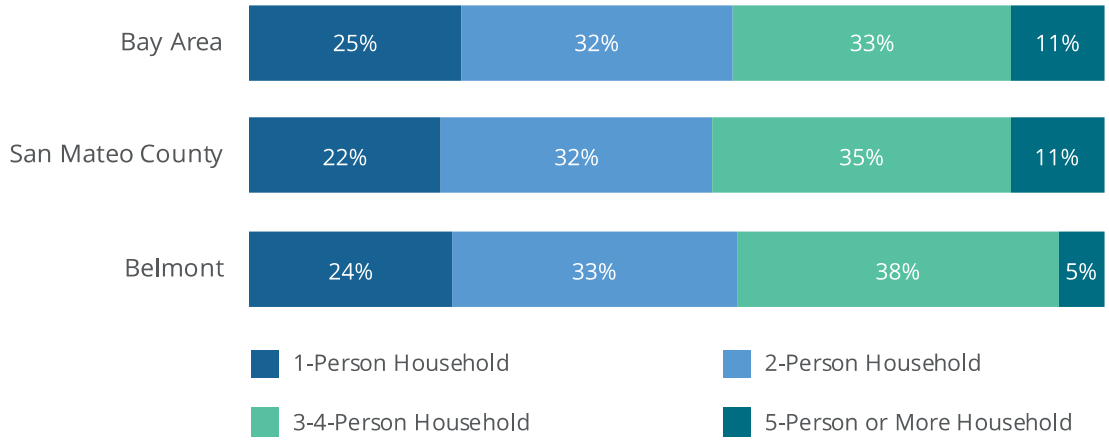
Familial status.

Figure II-15.
Age Distribution, Belmont, 2000-2019



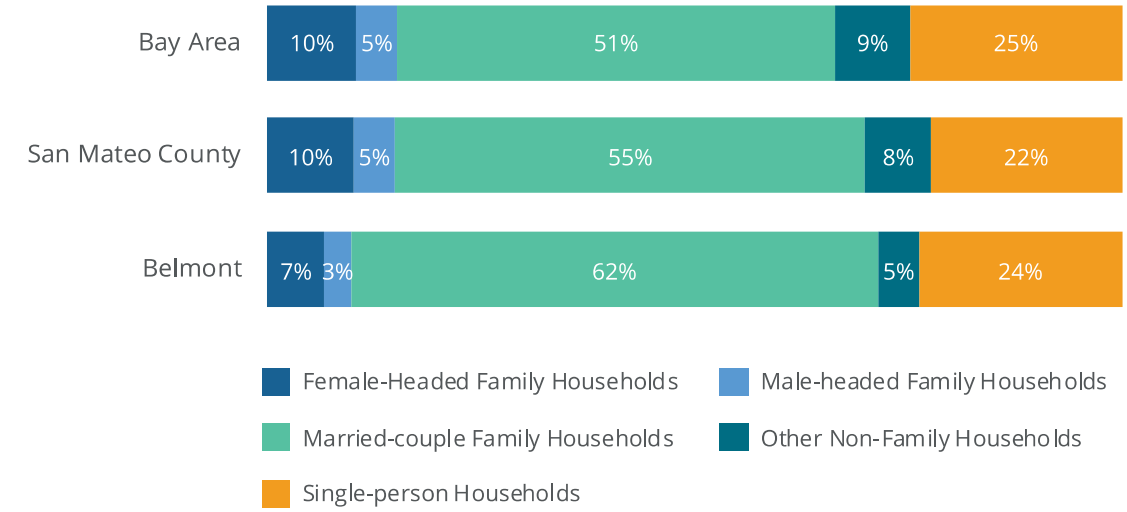
Source: ABAG Housing Needs Data Workbook

Figure II-16.
Share of Households by Size, 2019



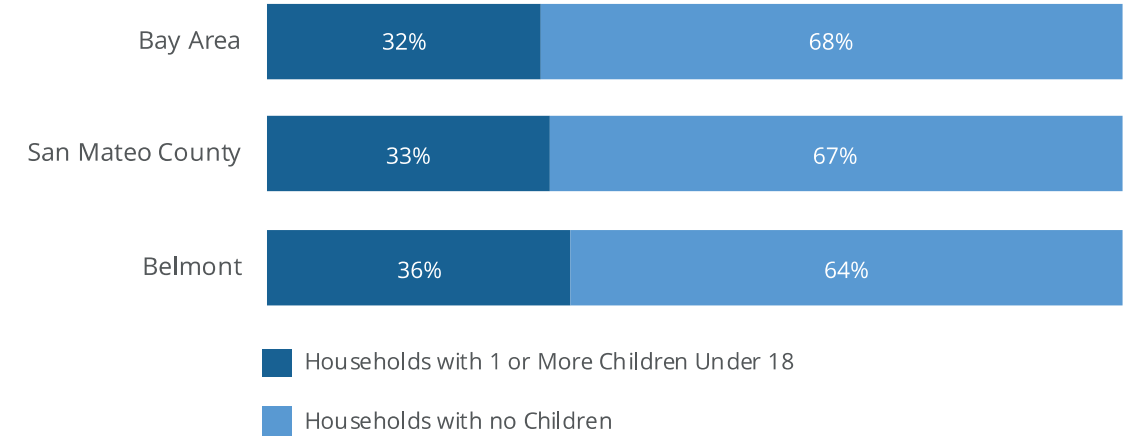
Source: ABAG Housing Needs Data Workbook

Figure II-17.
Share of Households by Type, 2019



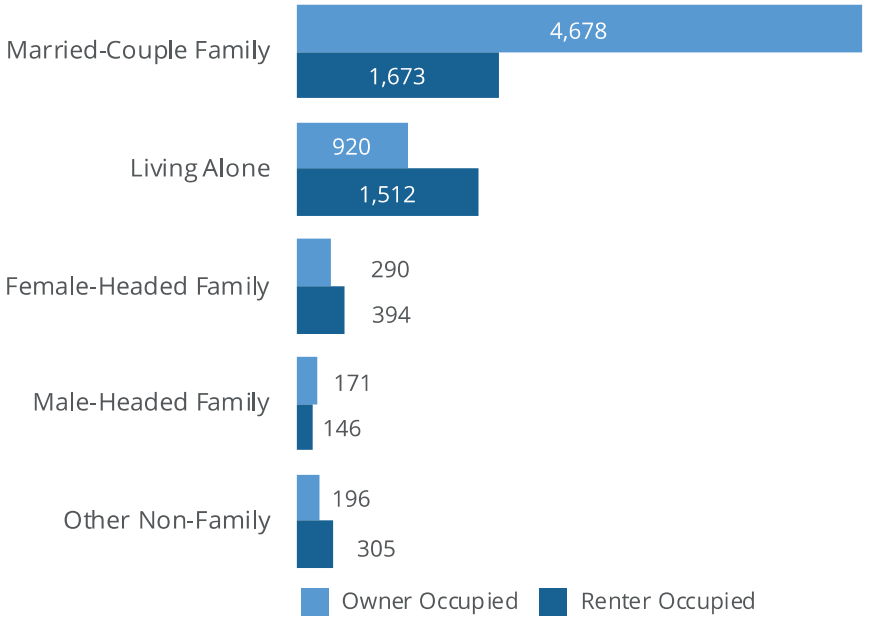
Source: ABAG Housing Needs Data Workbook

Figure II-18.
Share of Households by Presence of Children (Less than 18 years old), 2019



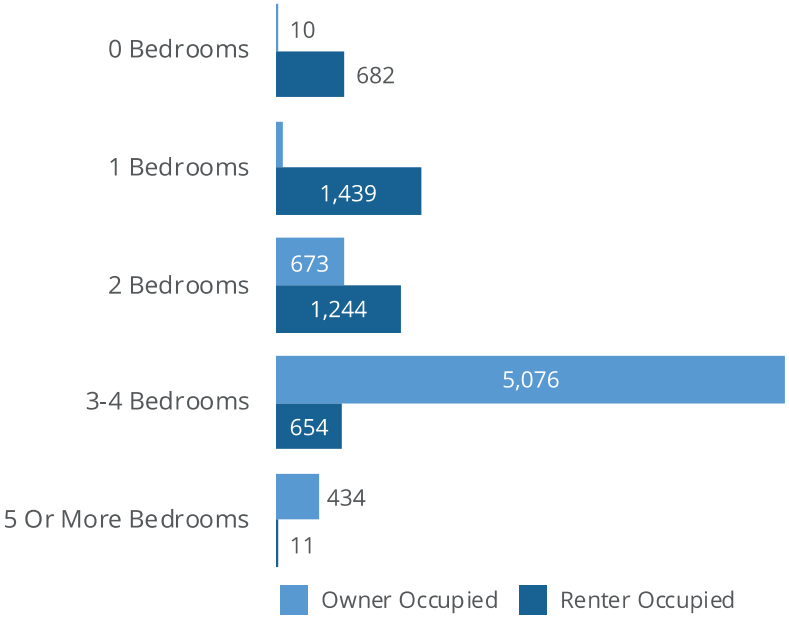
Source: ABAG Housing Needs Data Workbook

Figure II-19.
Housing Type by Tenure, Belmont, 2019



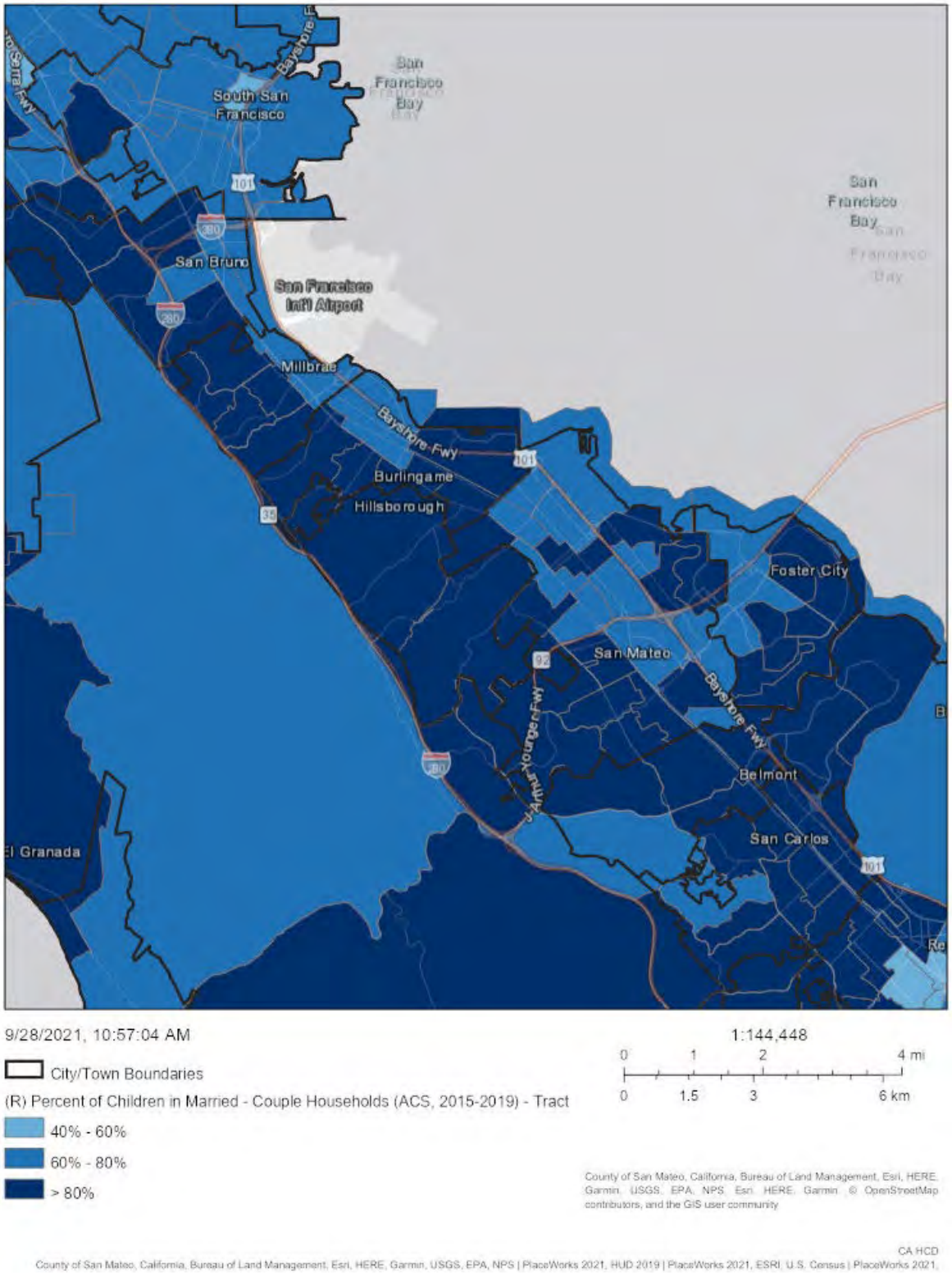
Source: ABAG Housing Needs Data Workbook

Figure II-20.
Housing Units by Number of Bedrooms and Tenure, Belmont, 2019



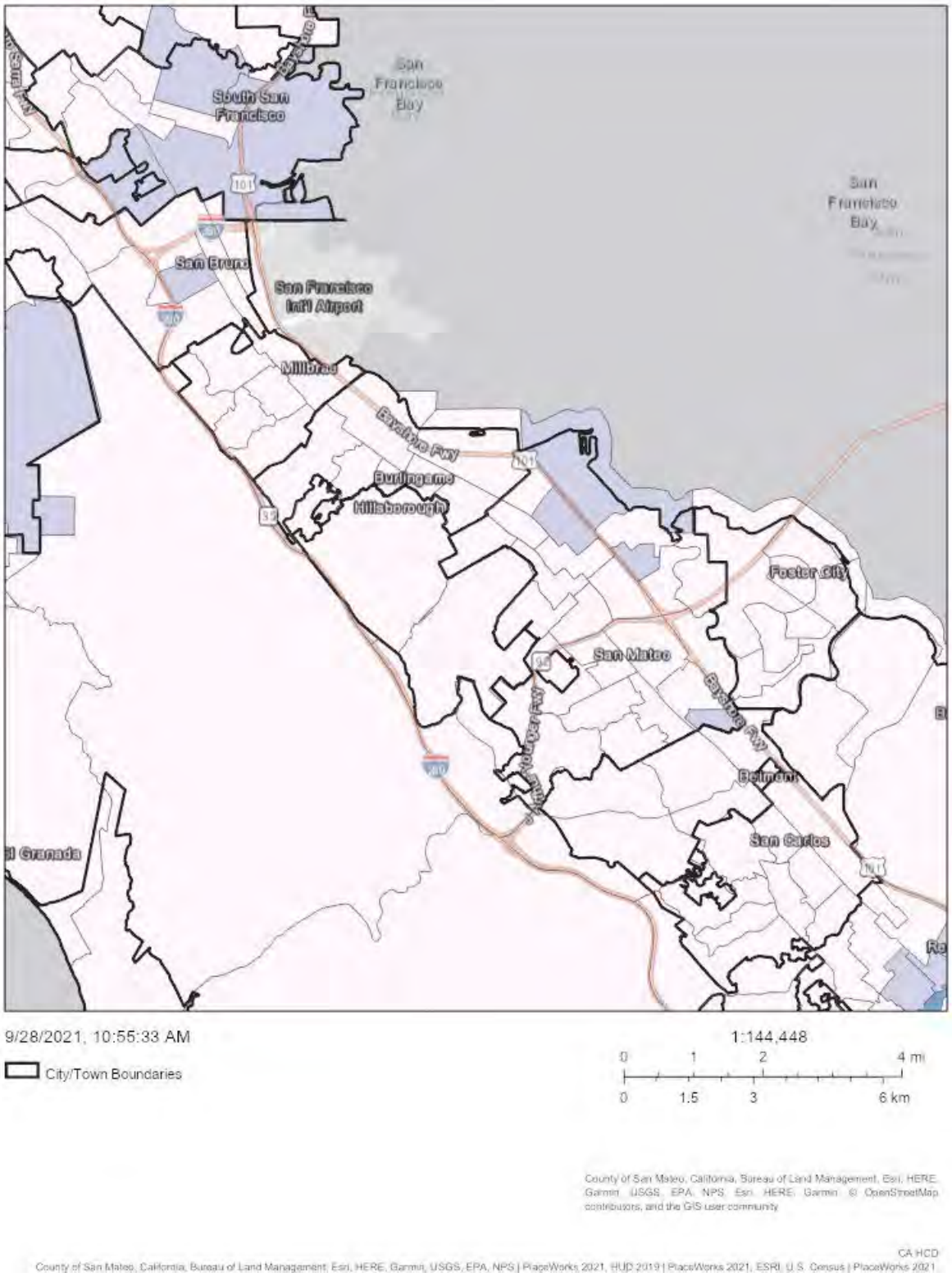
Source: ABAG Housing Needs Data Workbook

Figure II-21.
% of Children in Married Couple Households by Census Tract, 2019



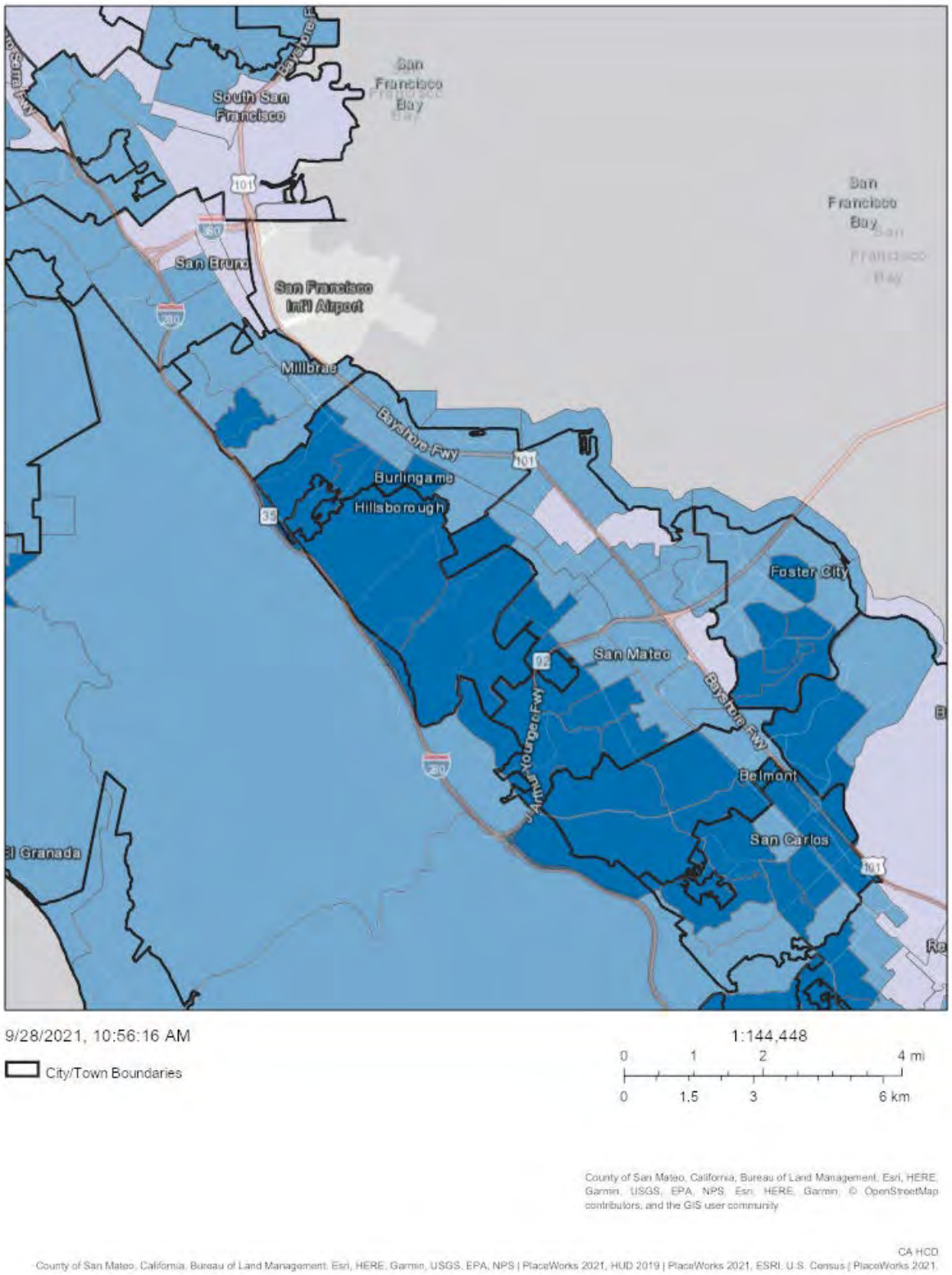
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-22.
% Households with Single Female with Children by Census Tract, 2019



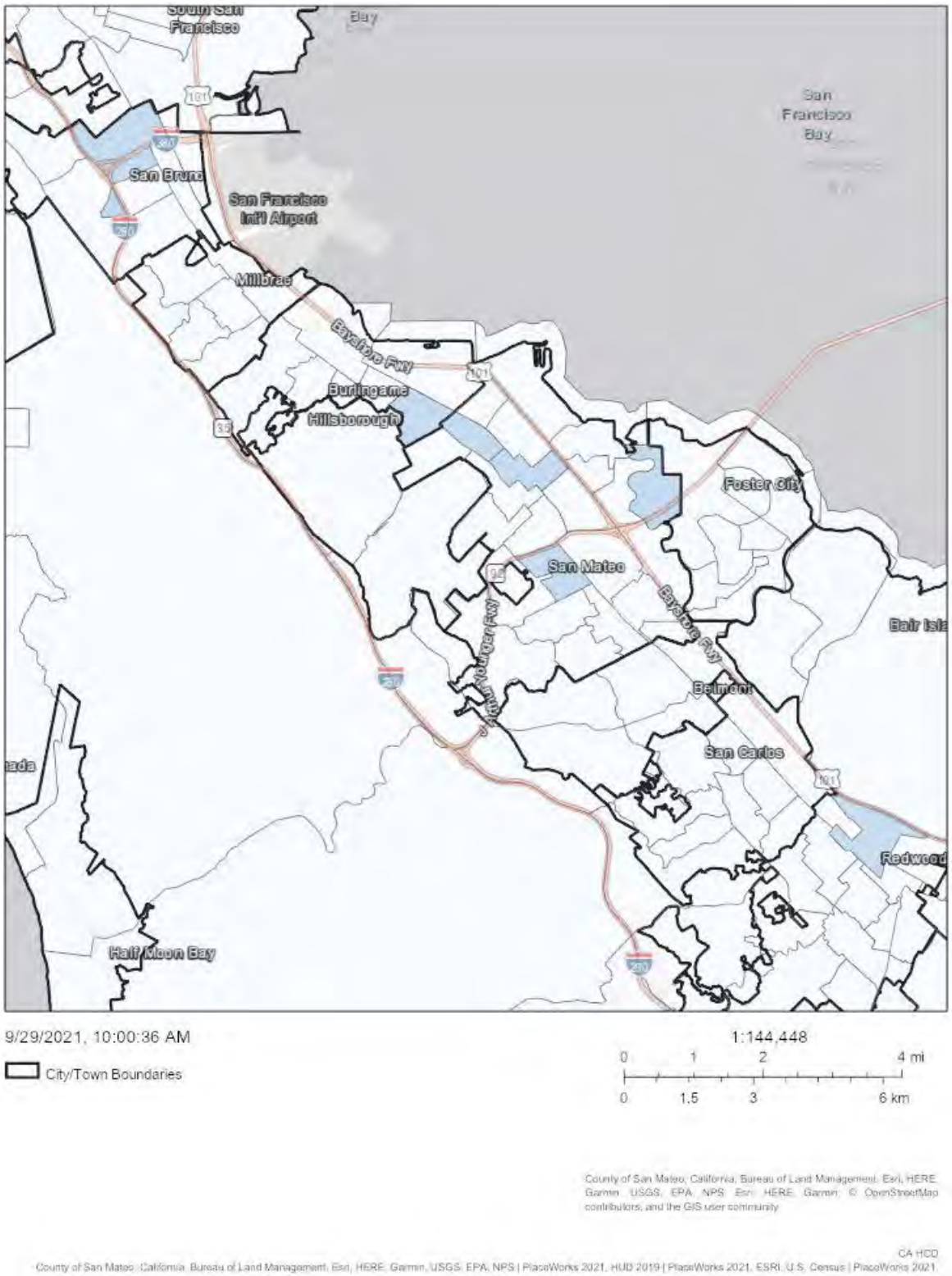
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-23.
% of Married Couple Households by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

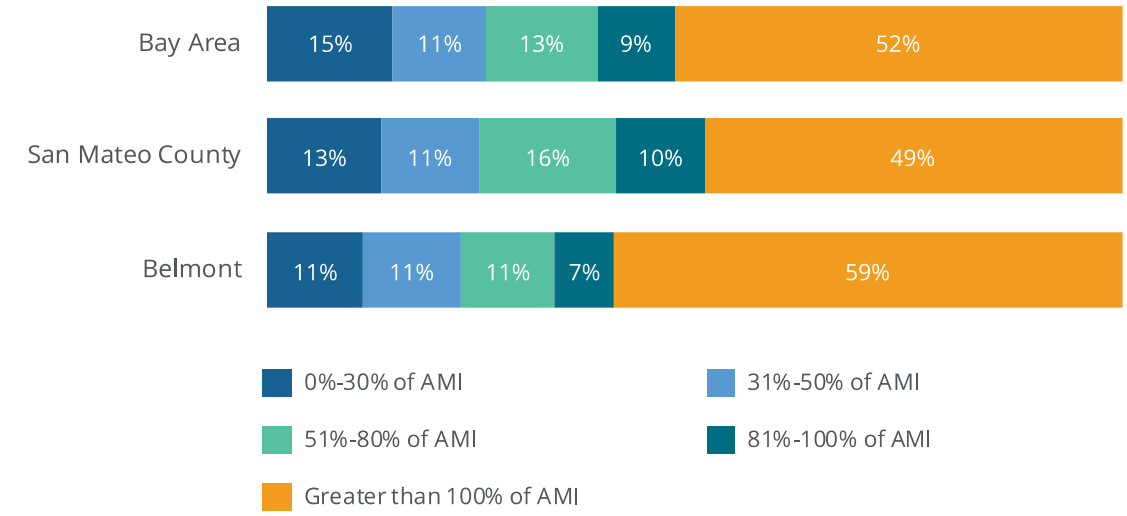
Figure II-24.
% of Adults Living Alone by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

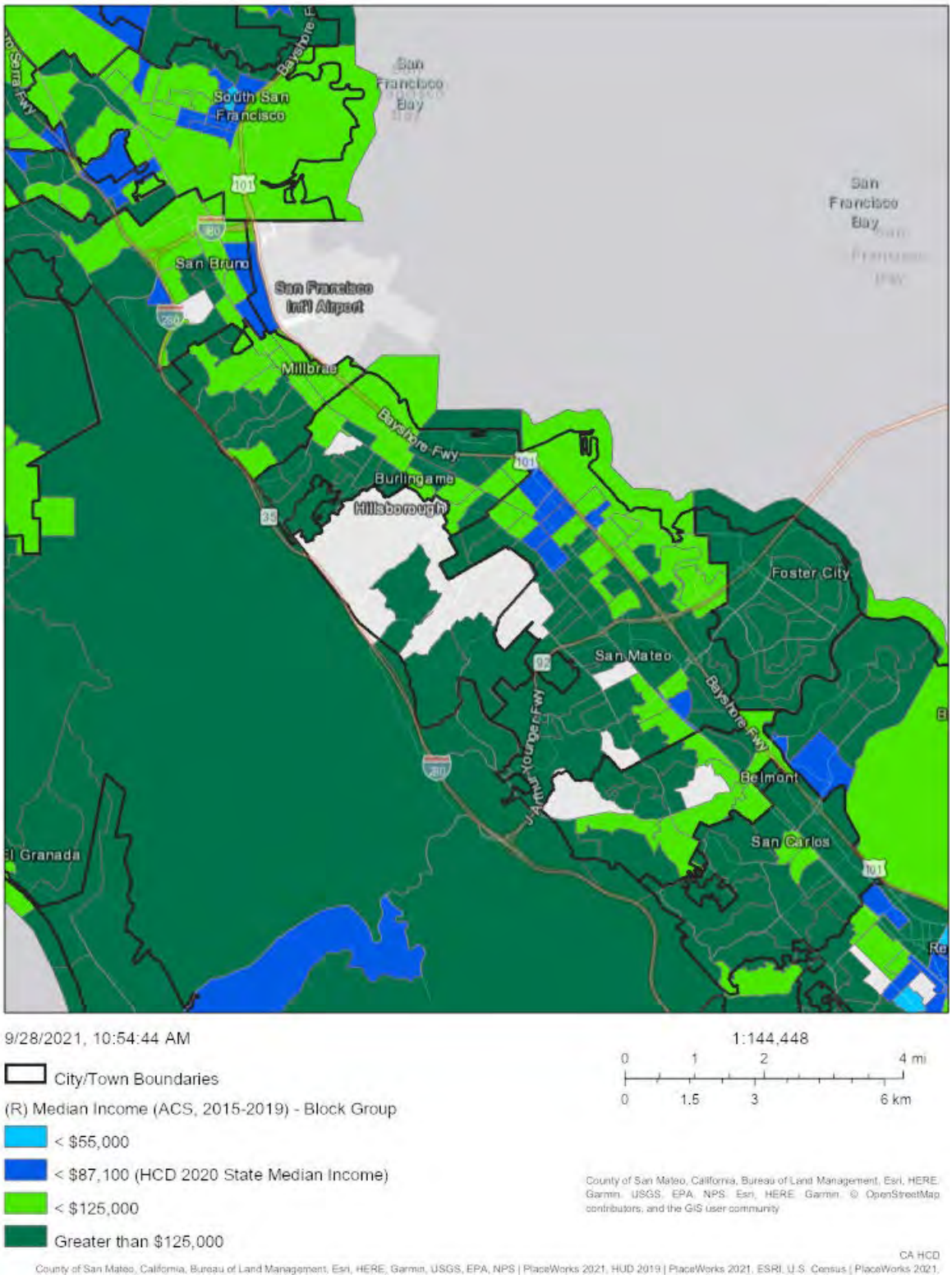
Household income.

Figure II-25.
Share of Households by Area Median Income (AMI), 2019



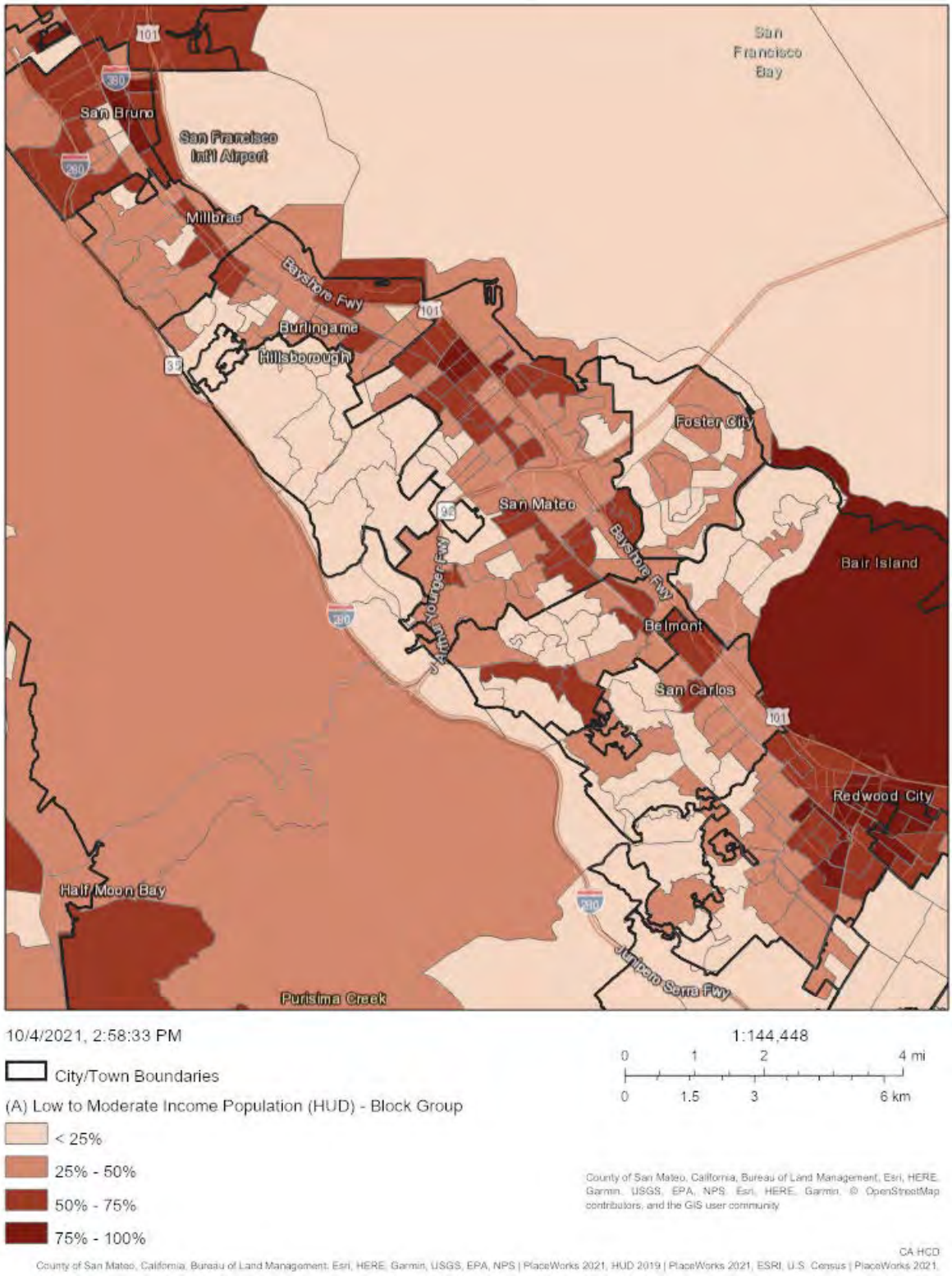
Source: ABAG Housing Needs Data Workbook

Figure II-26.
Median Household Income by Block Group, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-27.
Low to Moderate Income Population by Block Group



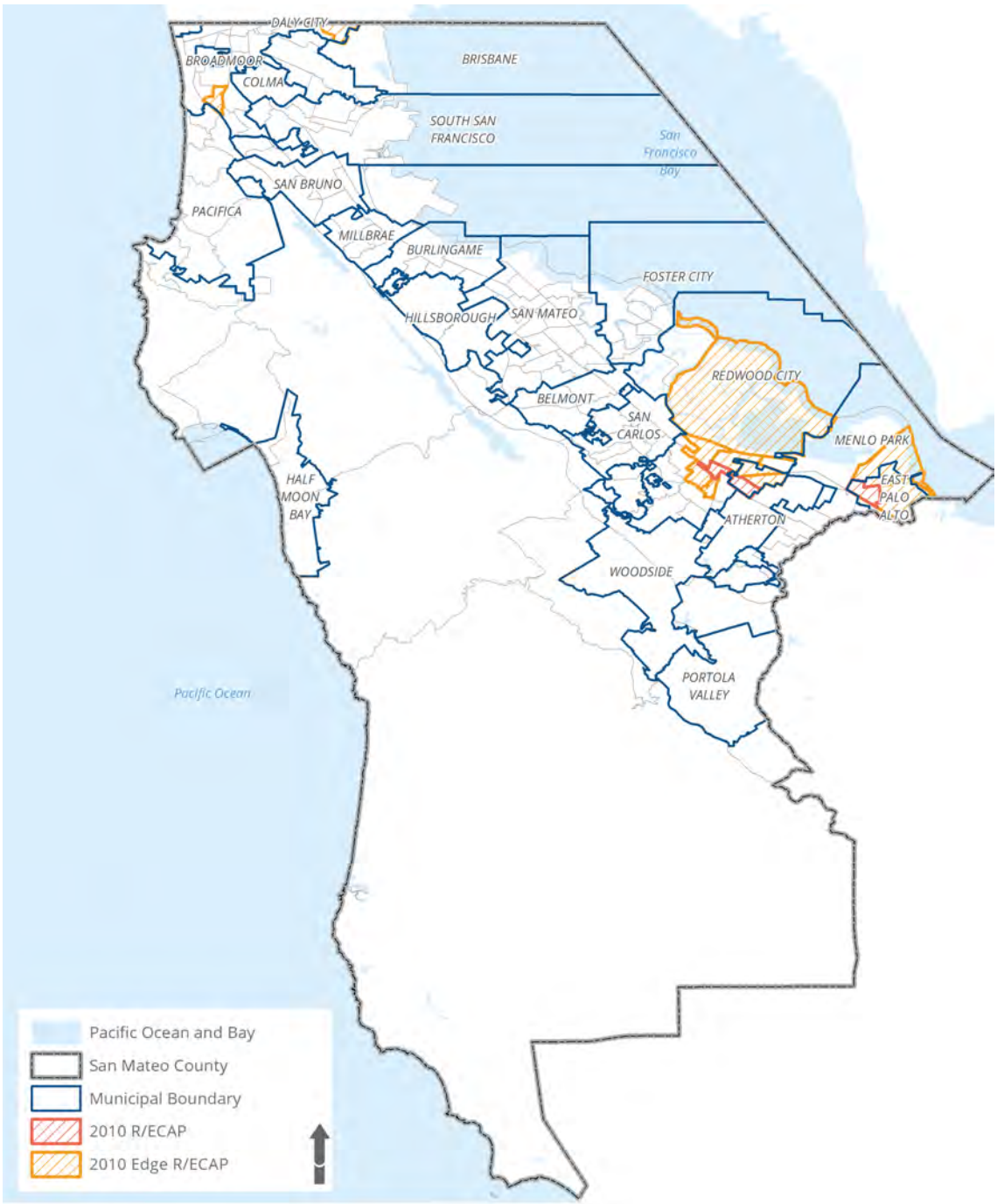
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-28.
Poverty Status by Census Tract, 2019



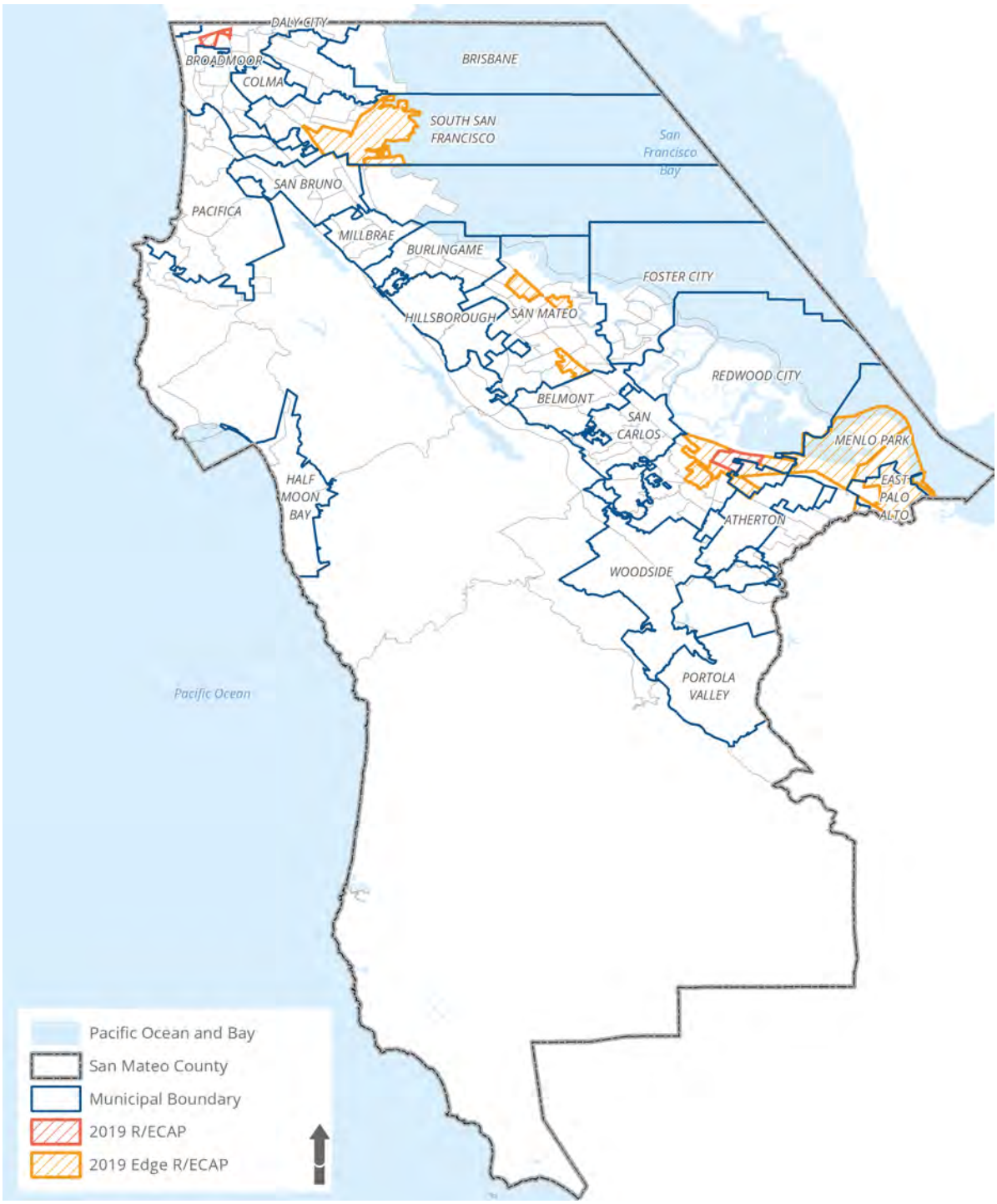
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-29.
R/ECAPs and Edge R/ECAPs, 2010



Note: R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is three times the average tract poverty rate for the County (19.4% in 2010). Edge R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is two times the average tract poverty rate for the County (13% in 2010).
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure II-30.
R/ECAPs and Edge R/ECAPs, 2019



Note: R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is three times the average tract poverty rate for the County (19.1% in 2010). Edge R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is two times the average tract poverty rate for the County (12.8% in 2019).

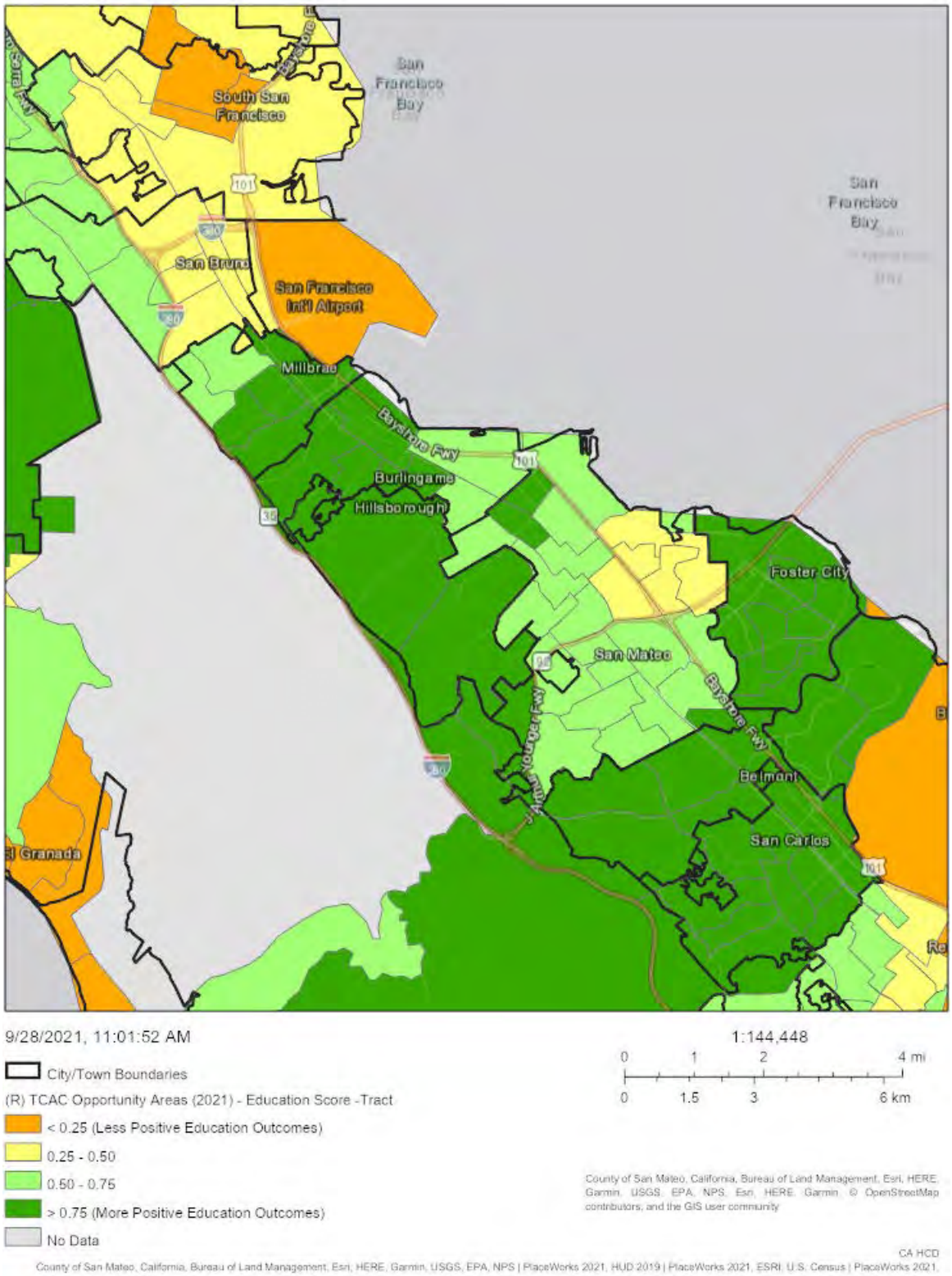
Source: California Department of Housing and Community Development AFFH Data Viewer

SECTION III. Access to Opportunity

Education

Appendix item: Access to education supplement—findings from a countywide analysis of access to education and educational outcomes by protected class.

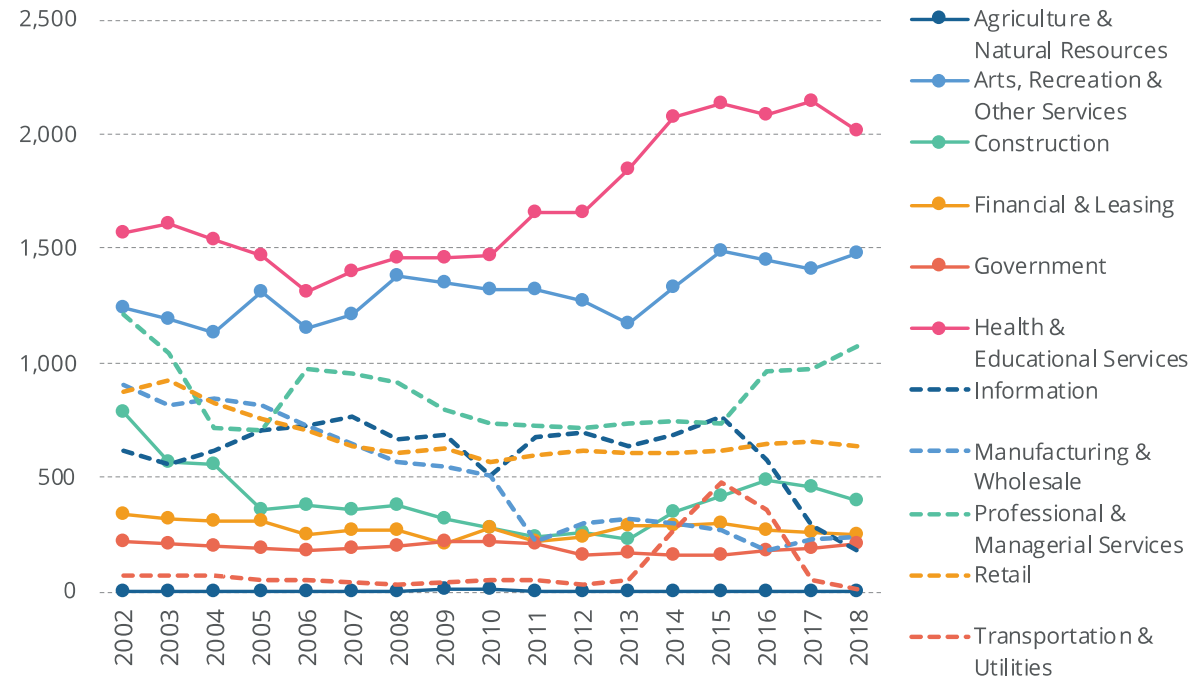
Figure III-1.
TCAC Opportunity Areas Education Score by Census Tract, 2021



Source: California Department of Housing and Community Development AFFH Data Viewer

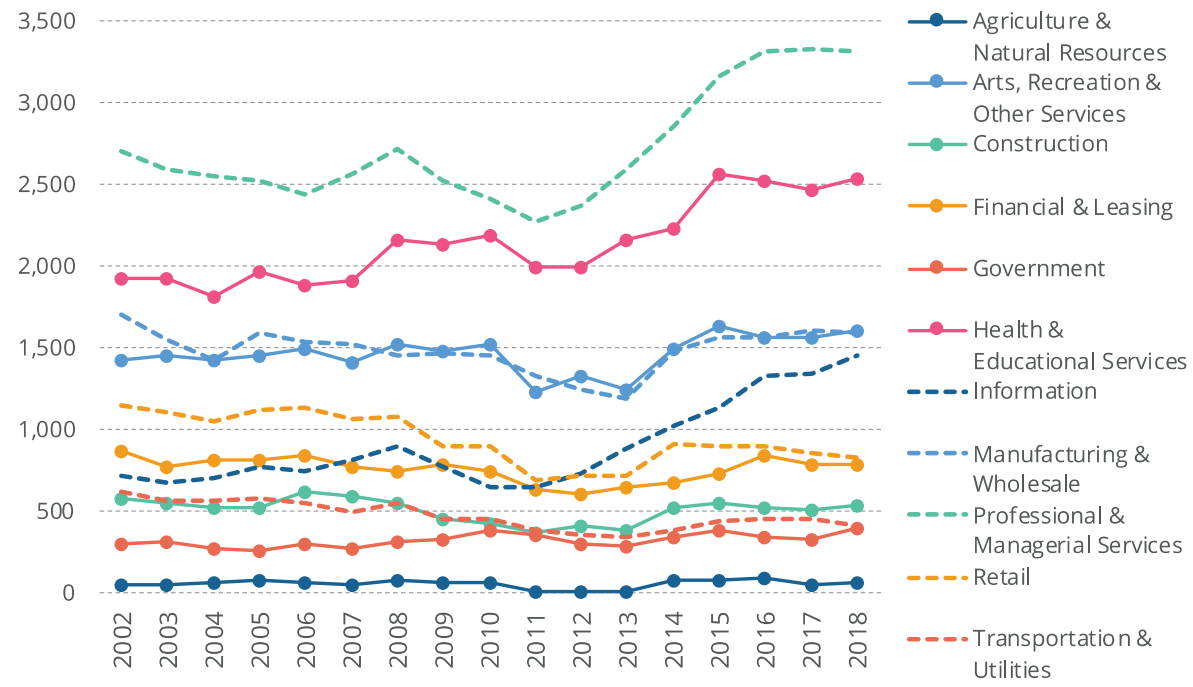
Employment

Figure III-2.
Jobs by Industry, Belmont, 2002-2018



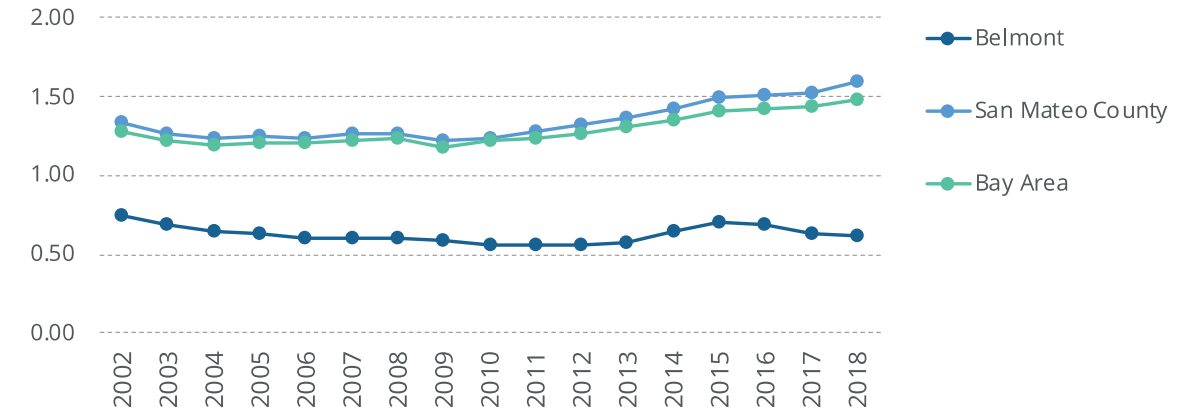
Source: ABAG Housing Needs Data Workbook

Figure III-3.
Job Holders by Industry, Belmont, 2002-2018



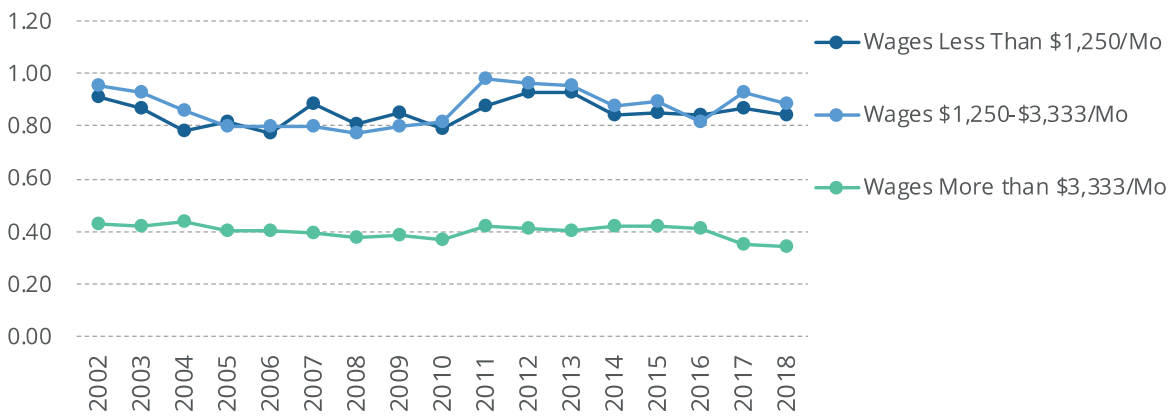
Source: ABAG Housing Needs Data Workbook

Figure III-4.
Jobs to Household Ratio, Belmont, 2002-2018



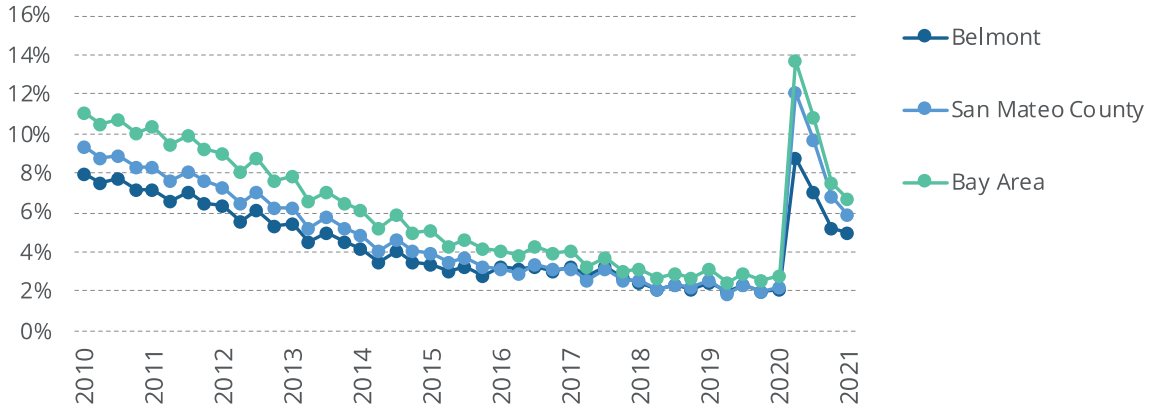
Source: ABAG Housing Needs Data Workbook

Figure III-5.
Jobs to Worker Ratio by Wage, Belmont, 2002-2018



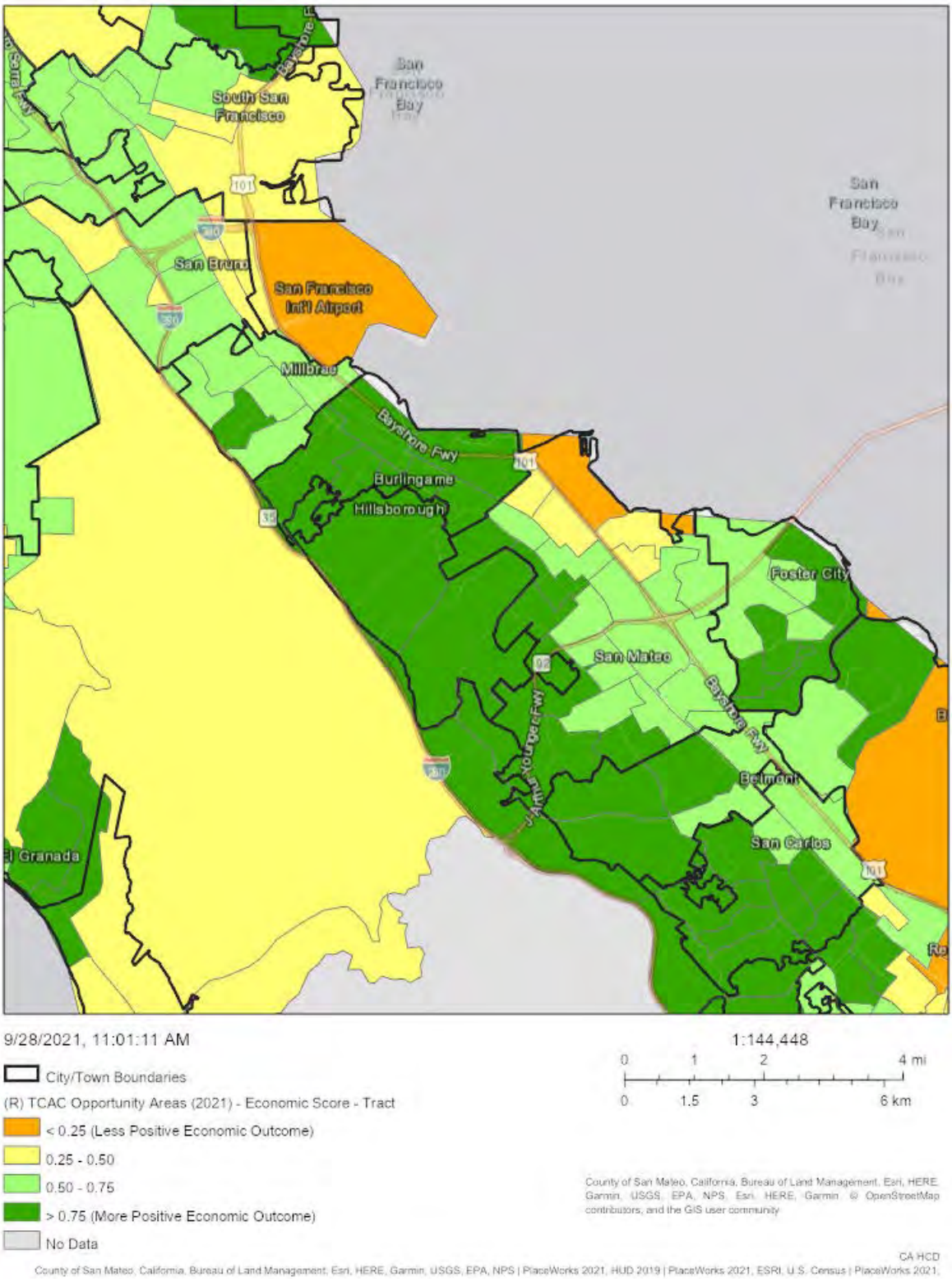
Source: ABAG Housing Needs Data Workbook

Figure III-6.
Unemployment Rate, 2010-2021



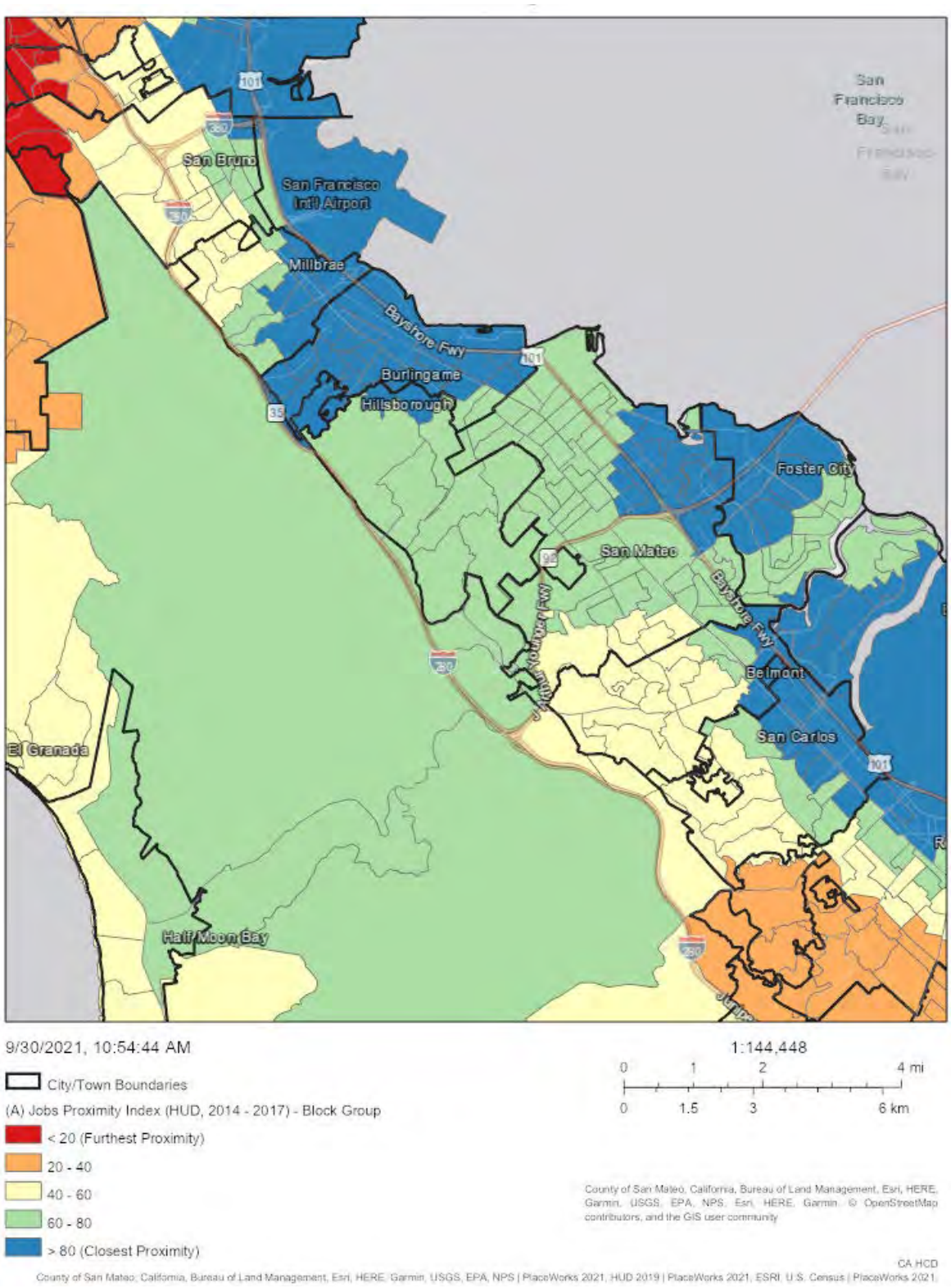
Source: ABAG Housing Needs Data Workbook

Figure III-7.
TCAC Opportunity Areas Economic Score by Census Tract, 2021



Source: California Department of Housing and Community Development AFFH Data Viewer

Figure III-8.
Jobs Proximity Index by Block Group, 2017

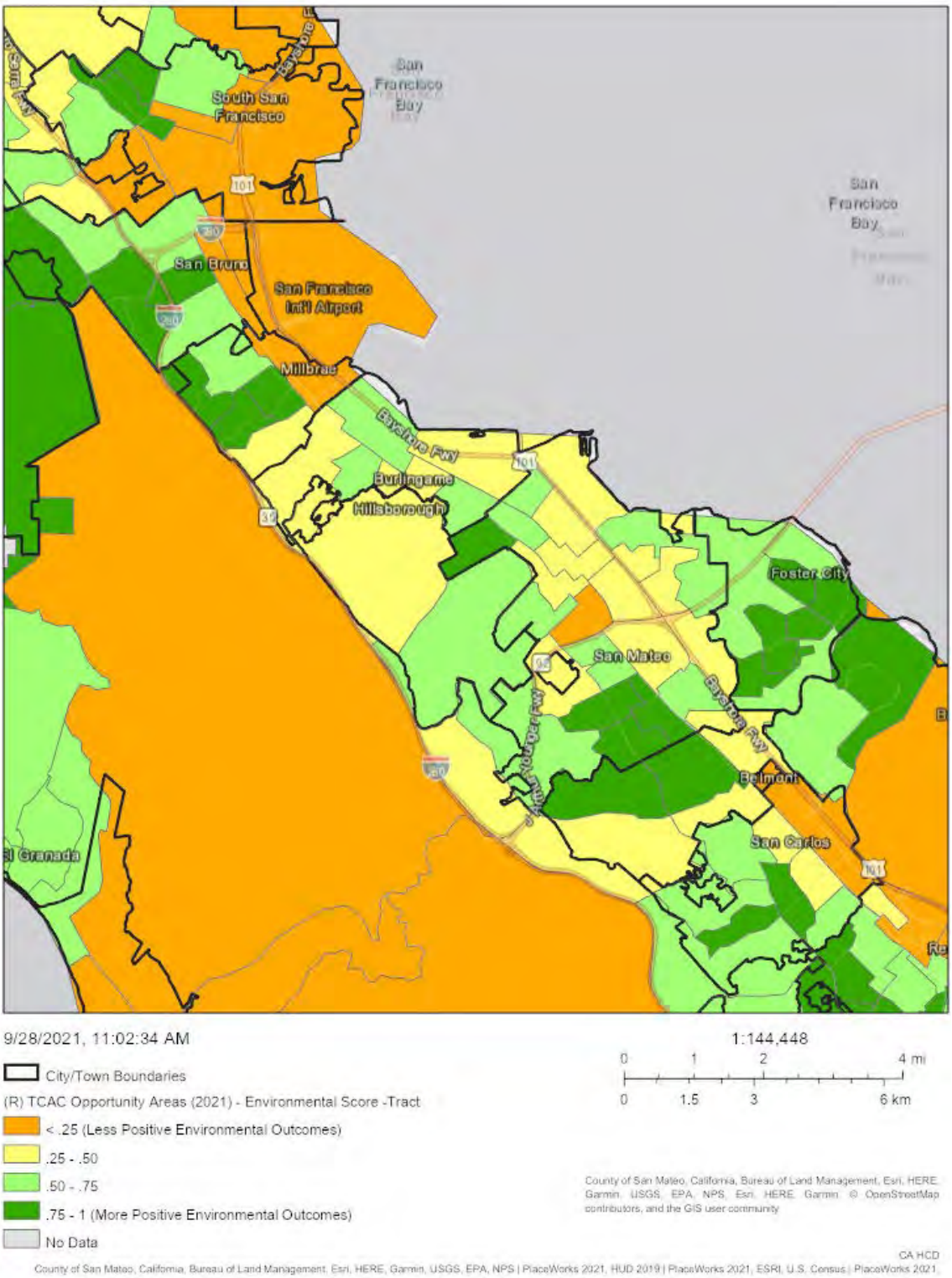


Source: California Department of Housing and Community Development AFFH Data Viewer

Environment

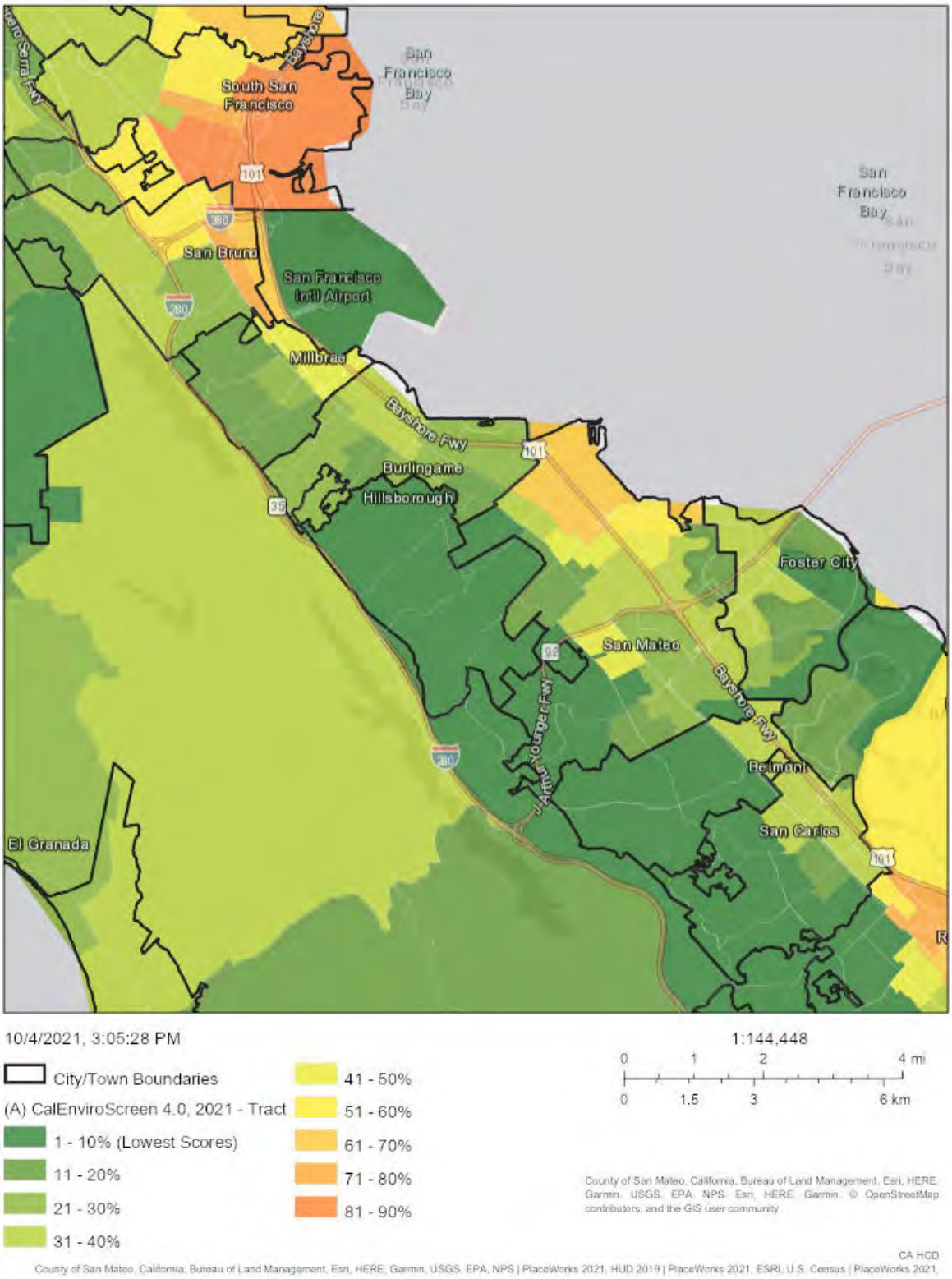
Figure III-9.

TCAC Opportunity Areas Environmental Score by Census Tract, 2021



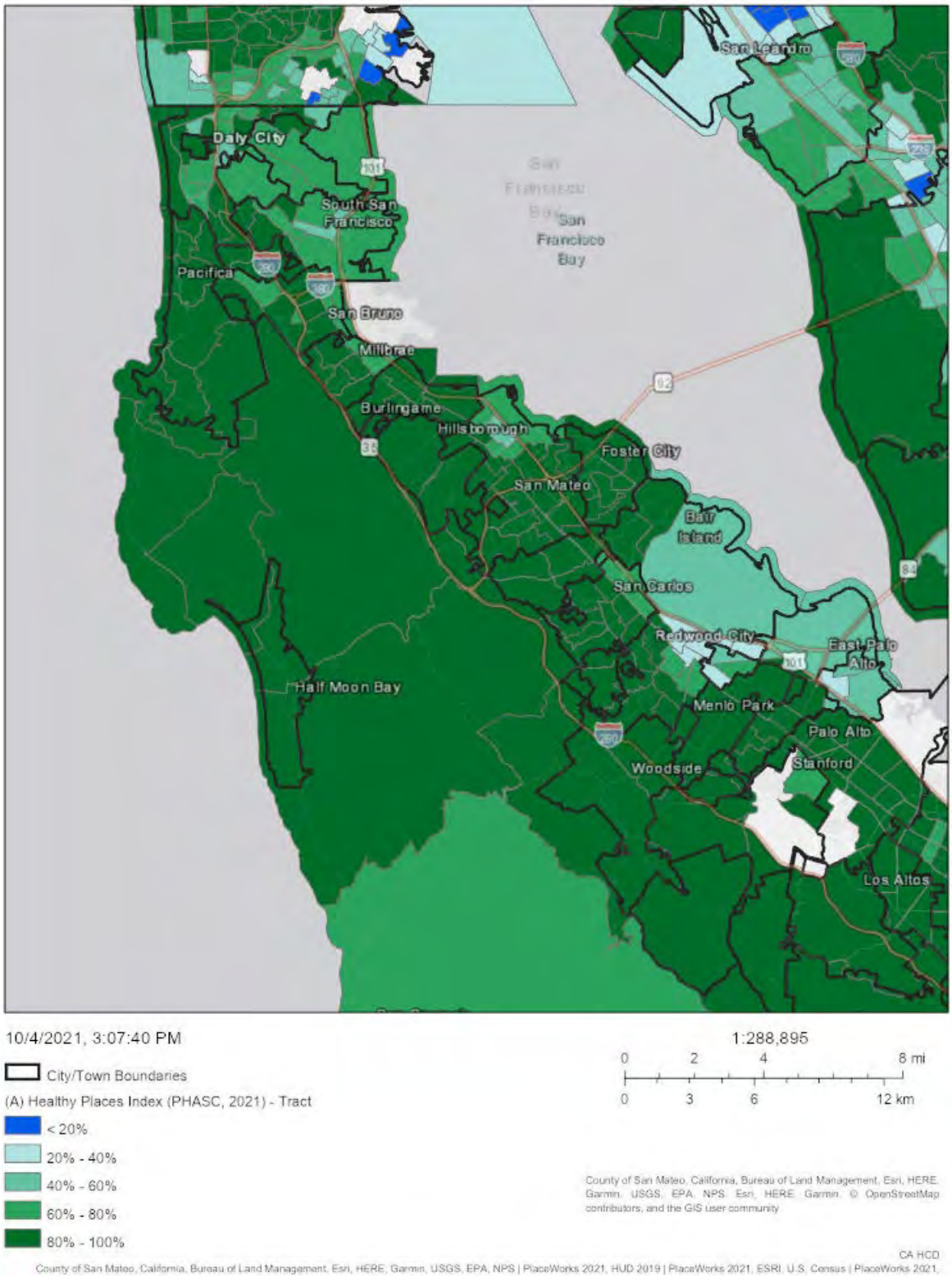
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure III-10.
CalEnviroScreen by Census Tract, 2021



Source: California Department of Housing and Community Development AFFH Data Viewer

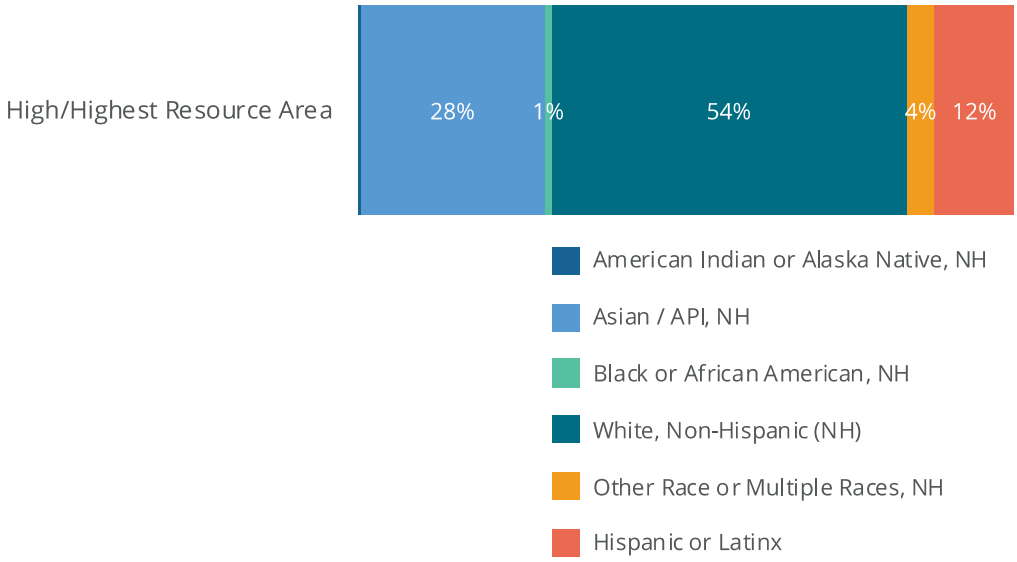
Figure III-11.
Healthy Places Index by Census Tract, 2021



Source: California Department of Housing and Community Development AFFH Data Viewer

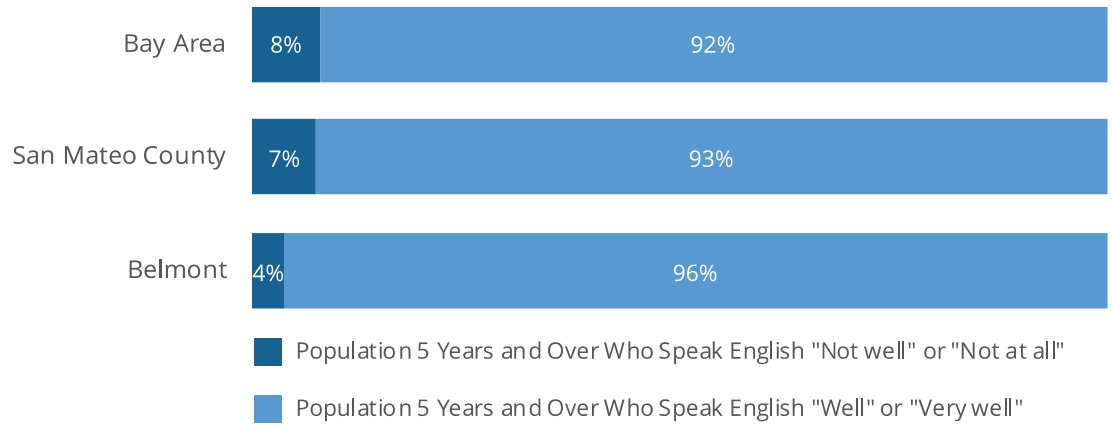
Patterns in disparities in access to opportunity.

Figure III-12.
Population Living in Moderate and High Resource Ares by Race and Ethnicity, Belmont, 2019



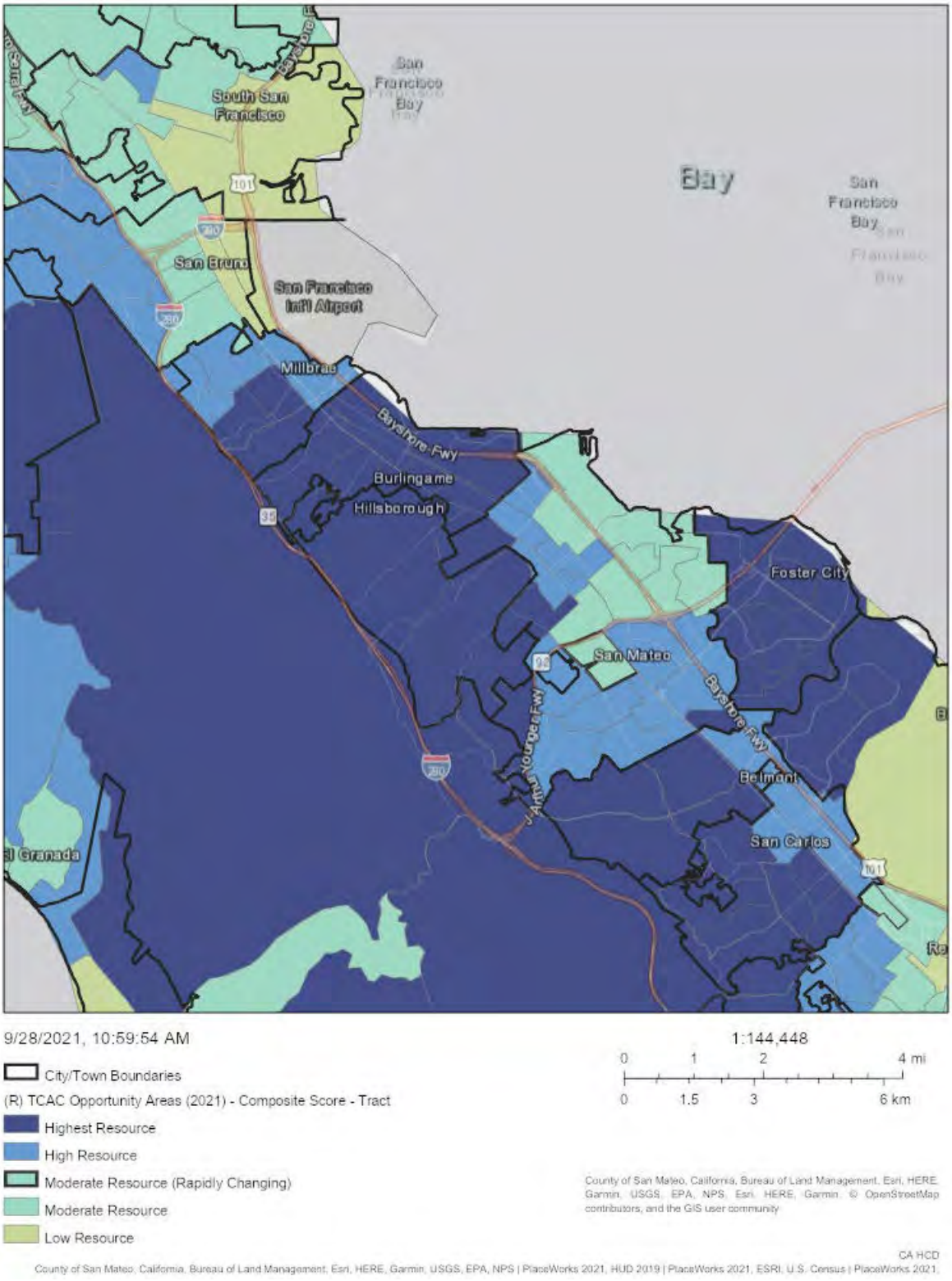
Source: ABAG Housing Needs Data Workbook

Figure III-13.
Population with Limited English Proficiency, Belmont, 2019



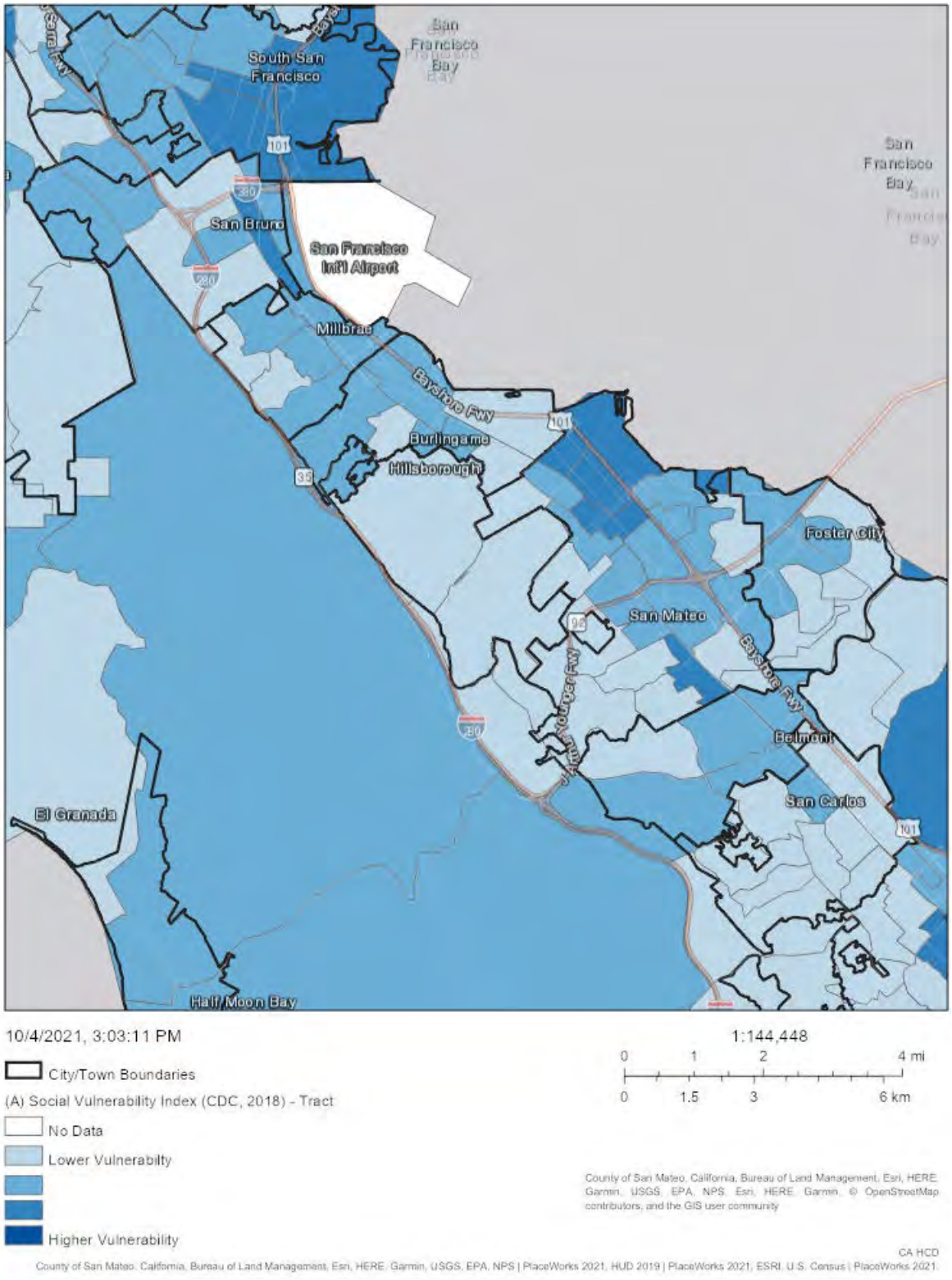
Source: ABAG Housing Needs Data Workbook

Figure III-14.
TCAC Opportunity Areas Composite Score by Census Tract, 2021



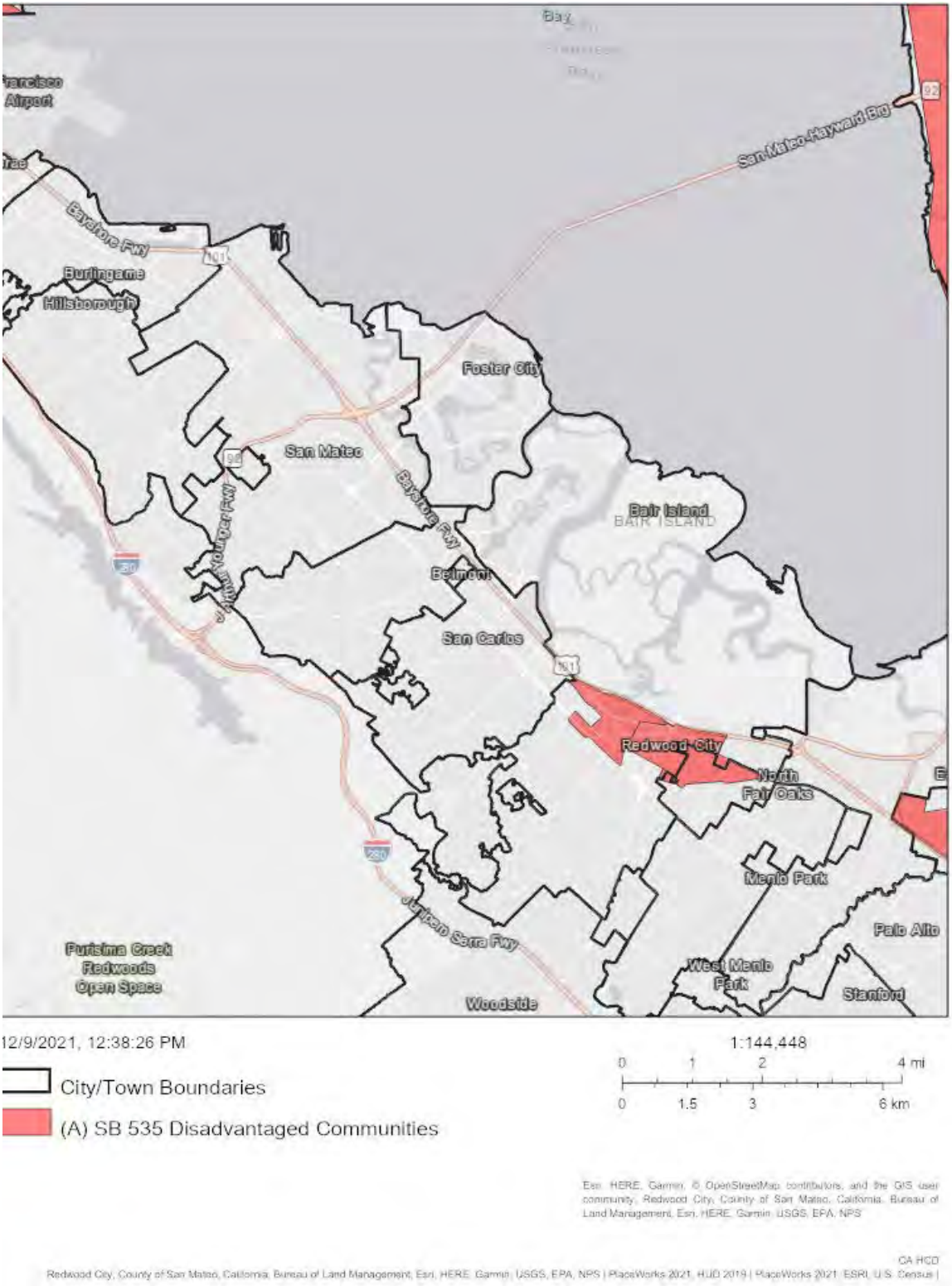
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure III-15.
Social Vulnerability Index by Census Tract, 2018



Source: California Department of Housing and Community Development AFFH Data Viewer

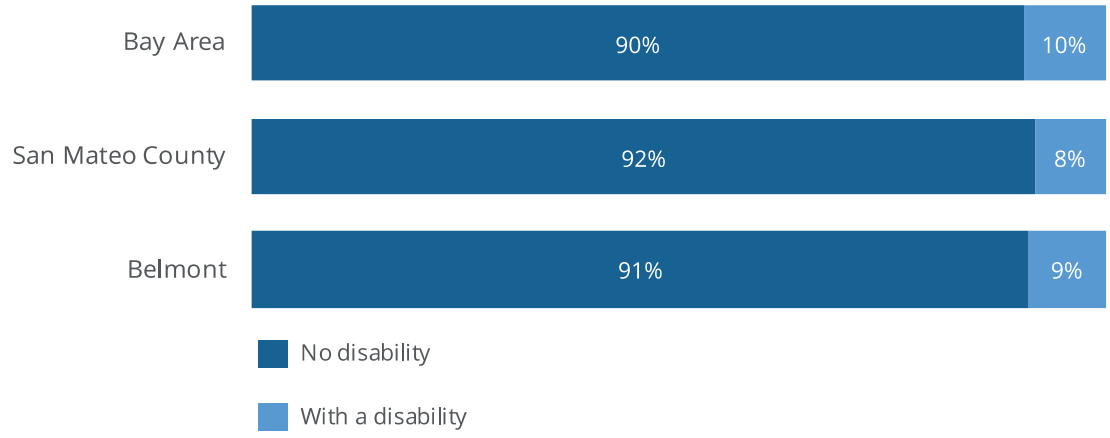
Figure III-16.
SB 535 Disadvantaged Communities



Source: California Department of Housing and Community Development AFFH Data Viewer

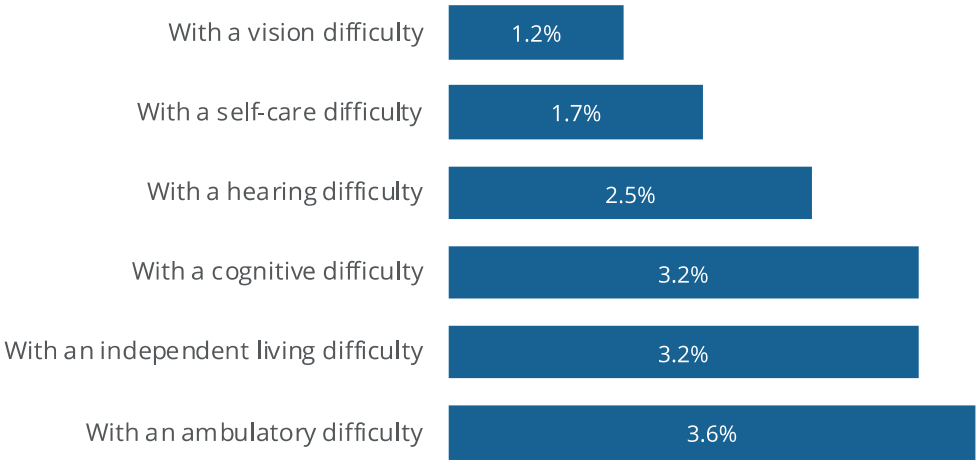
Disparities in access to opportunity for persons with disabilities.

Figure III-17.
Population by Disability Status, Belmont, 2019



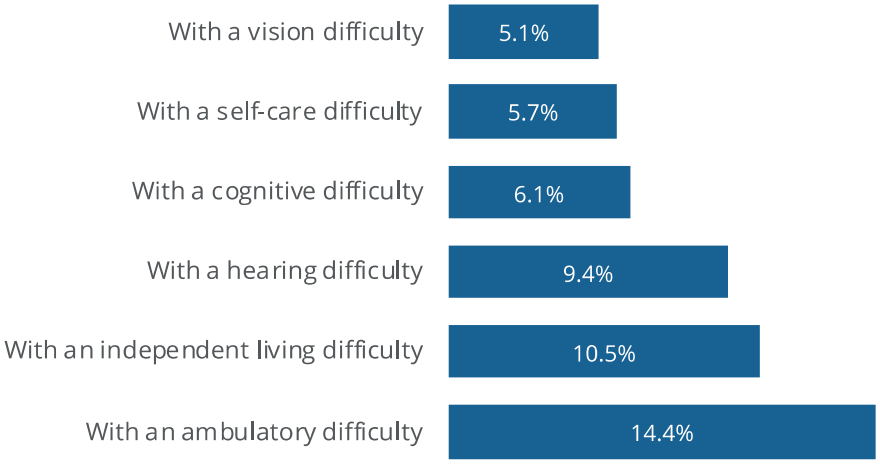
Source: ABAG Housing Needs Data Workbook

Figure III-18.
Disability by Type for the Non-Institutionalized Population 18 Years and Over, Belmont, 2019



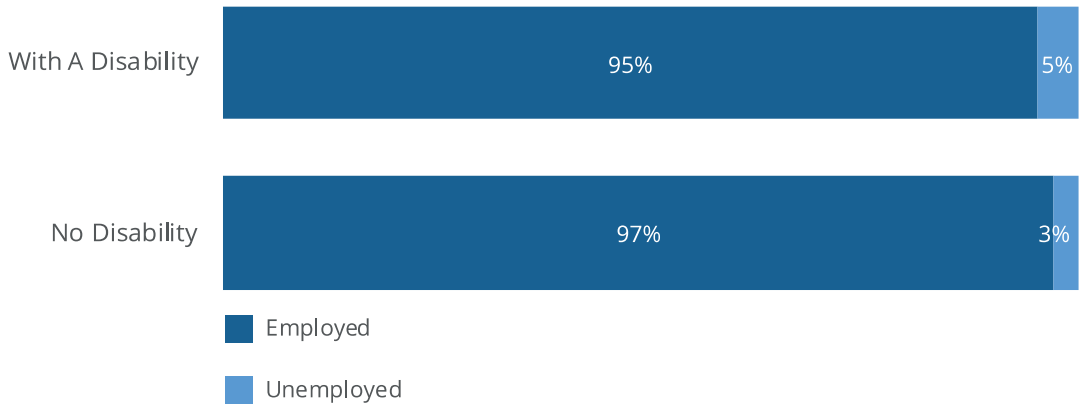
Source: ABAG Housing Needs Data Workbook

Figure III-19.
Disability by Type for Seniors (65 years and over), Belmont, 2019



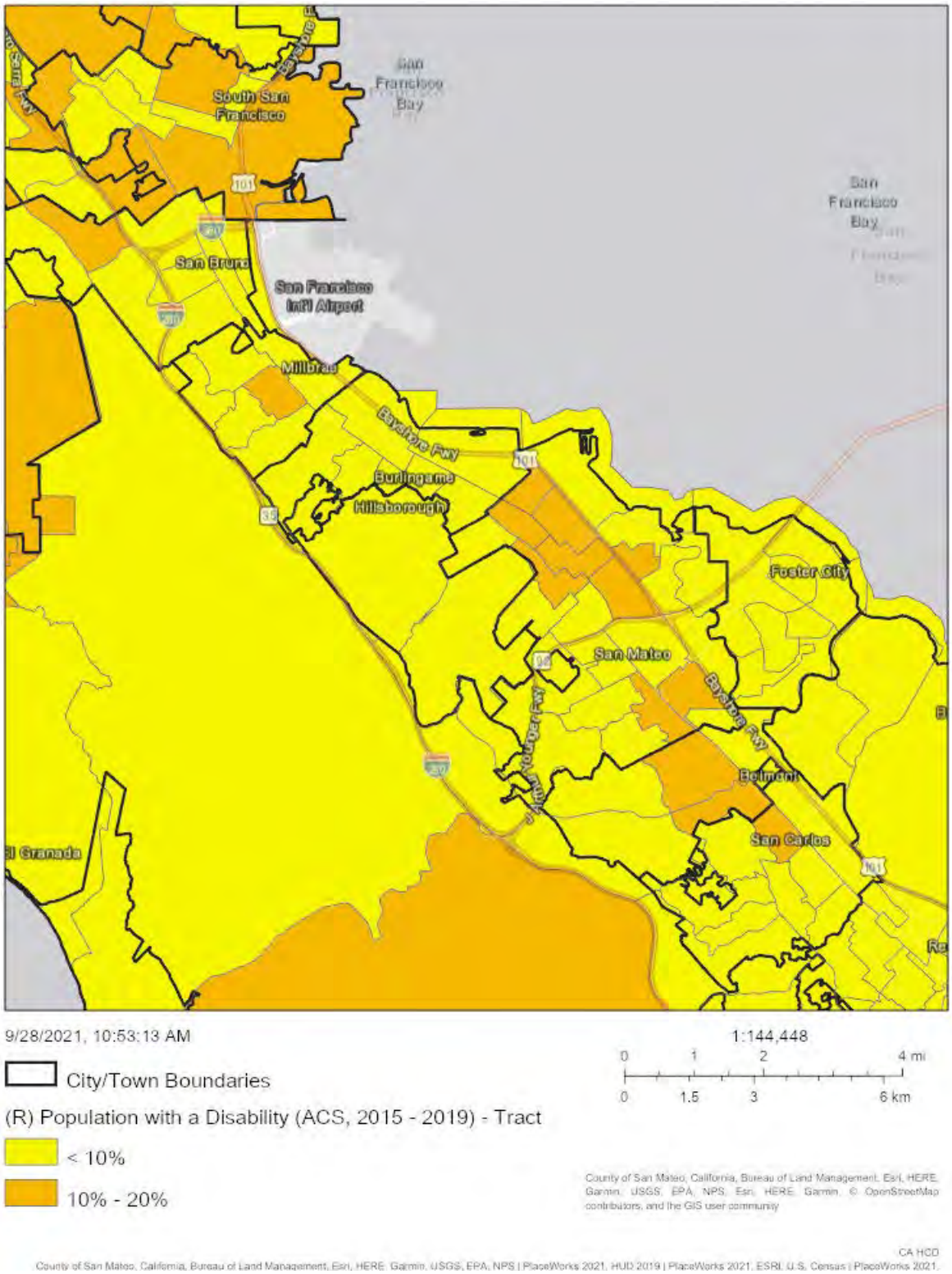
Source: ABAG Housing Needs Data Workbook

Figure III-20.
Employment by Disability Status, Belmont, 2019



Source: ABAG Housing Needs Data Workbook

Figure III-21.
Share of Population with a Disability by Census Tract, 2019

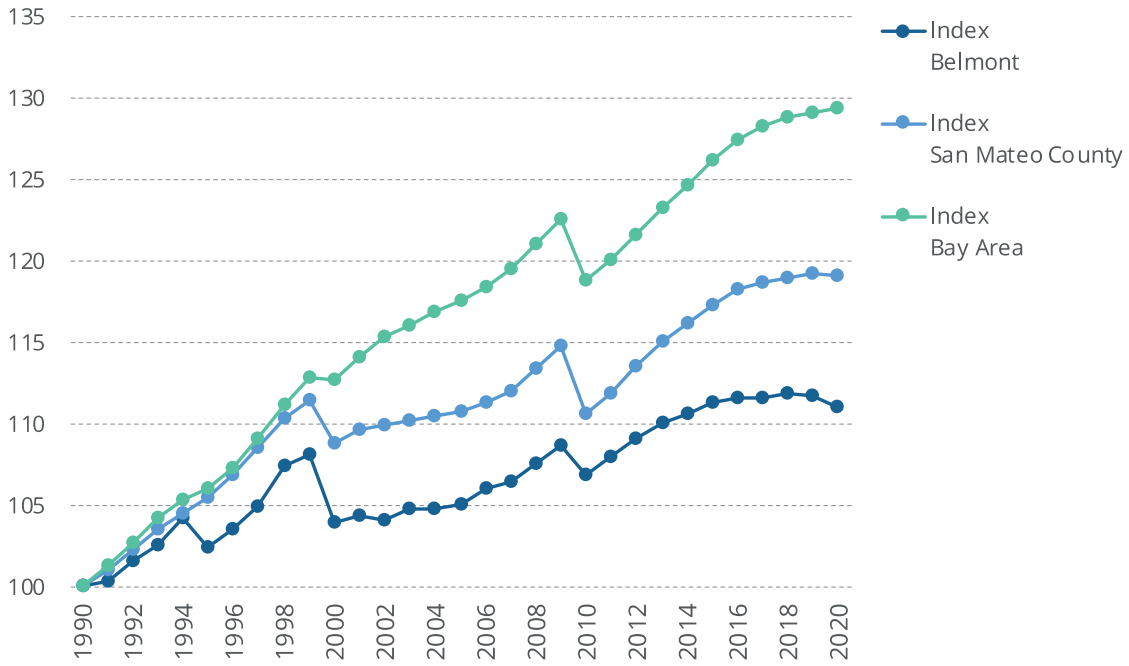


Source: California Department of Housing and Community Development AFFH Data Viewer

SECTION IV. Disproportionate Housing Needs

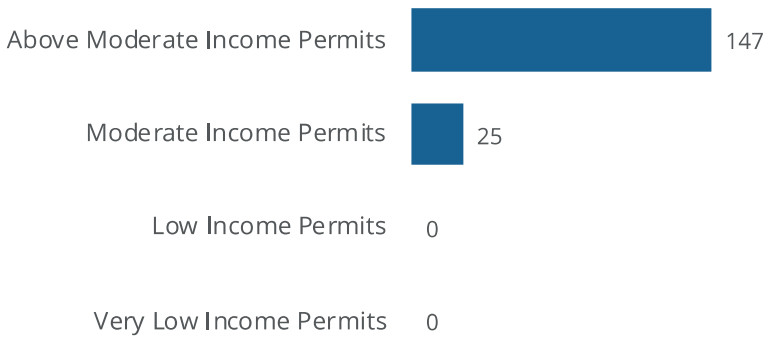
Housing needs.

Figure IV-1.
Population Indexed to 1990



Source: ABAG Housing Needs Data Workbook

Figure IV-2. Housing Permits Issued by Income Group, Belmont, 2015-2019



Source:
ABAG Housing Needs Data Workbook

Figure IV-3.
Housing Units by Year Built, Belmont

Source:
ABAG Housing Needs Data Workbook

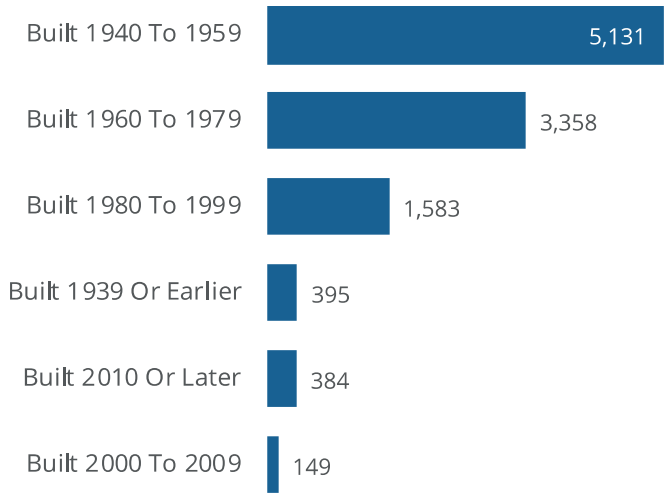
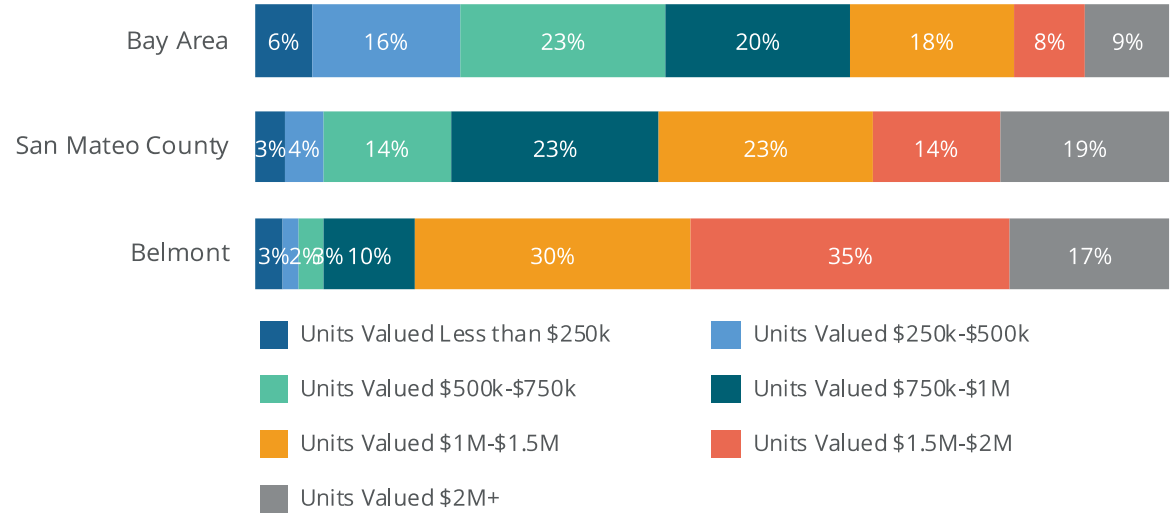
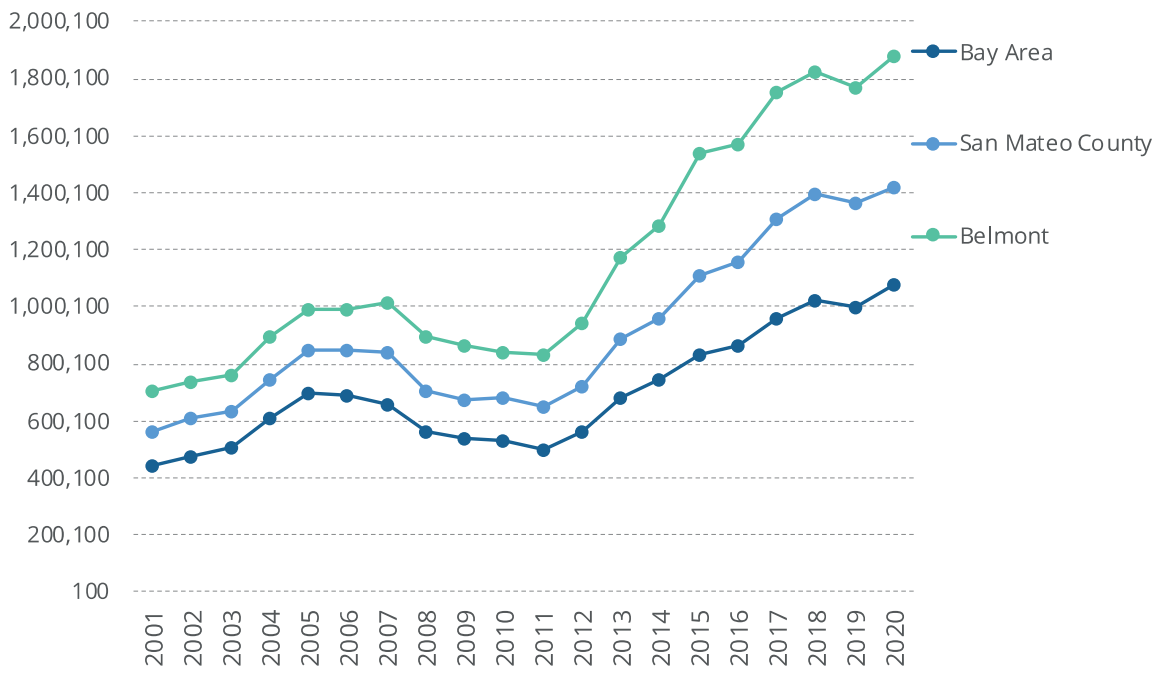


Figure IV-4.
Distribution of Home Value for Owner Occupied Units, 2019



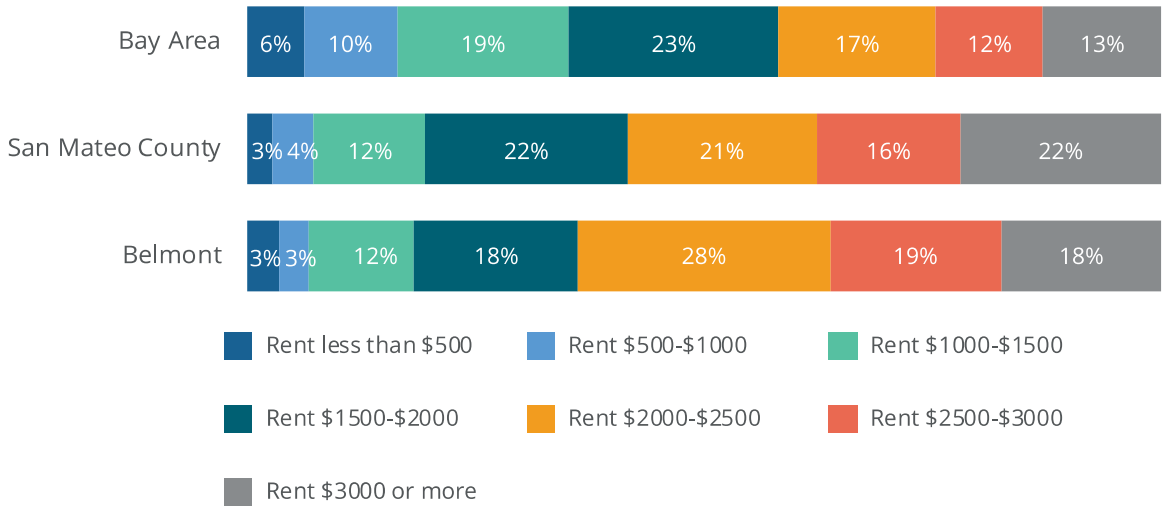
Source: ABAG Housing Needs Data Workbook

Figure IV-5.
Zillow Home Value Index, 2001-2020



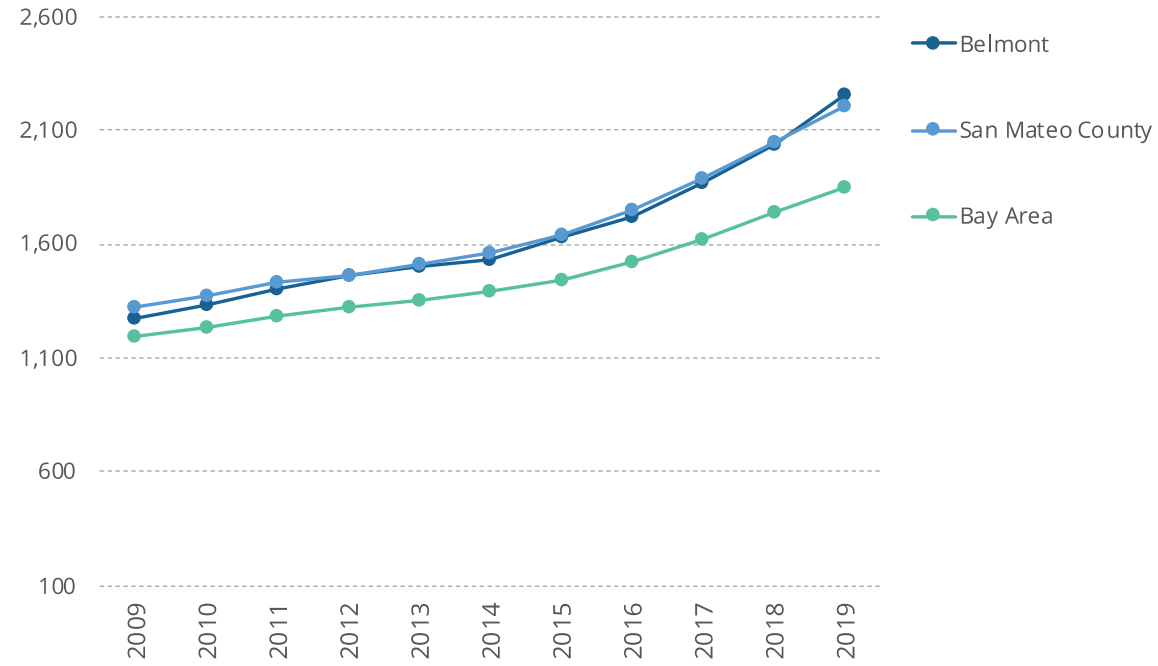
Source: ABAG Housing Needs Data Workbook

Figure IV-6.
Distribution of Contract Rents for Renter Occupied Units, 2019



Source: ABAG Housing Needs Data Workbook

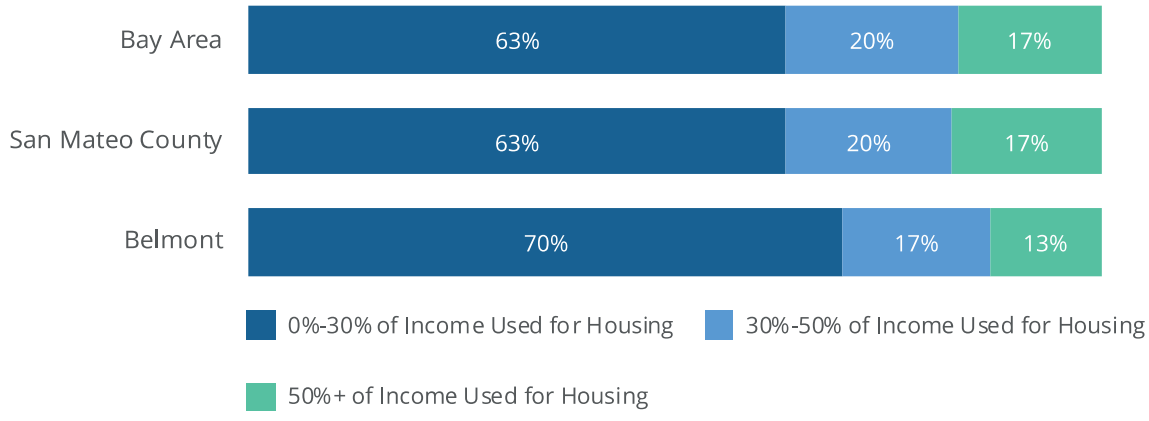
Figure IV-7.
Median Contract Rent, 2009-2019



Source: ABAG Housing Needs Data Workbook

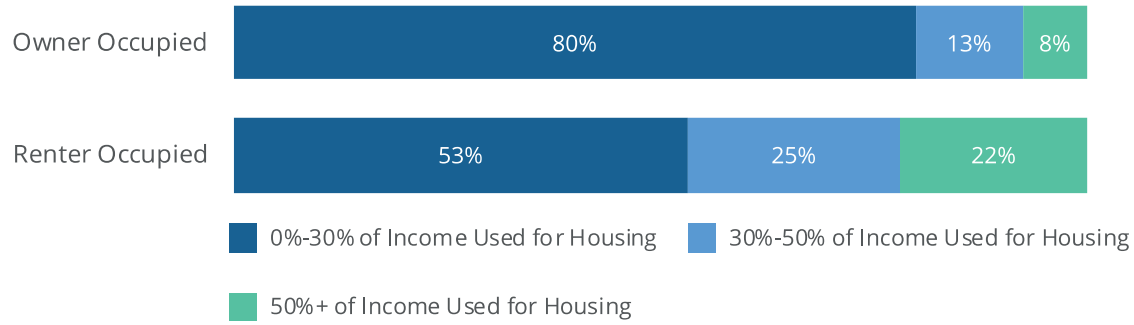
Cost burden and severe cost burden.

Figure IV-8.
Overpayment (Cost Burden) by Jurisdiction, 2019



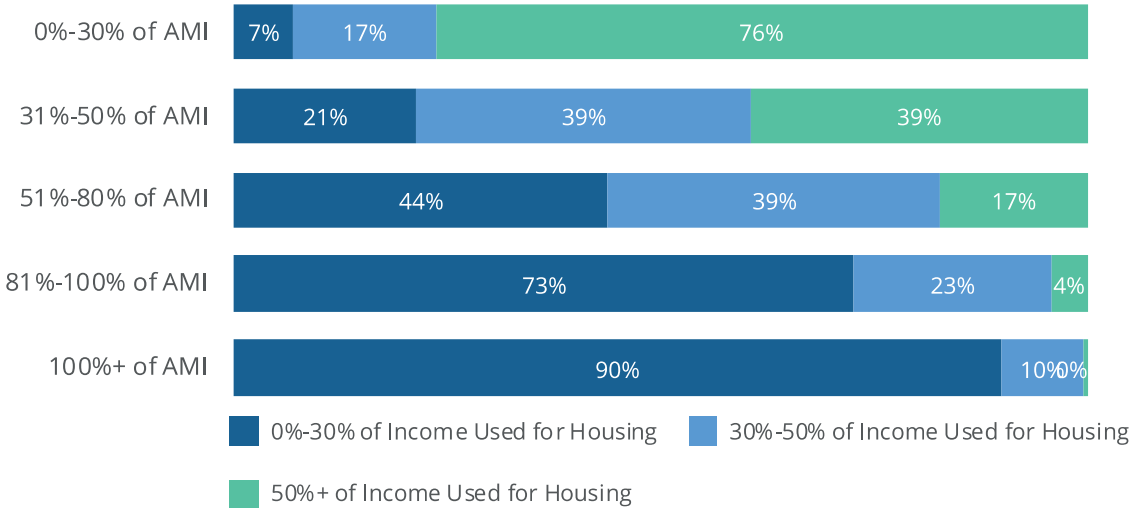
Source: ABAG Housing Needs Data Workbook

Figure IV-9.
Overpayment (Cost Burden) by Tenure, Belmont, 2019



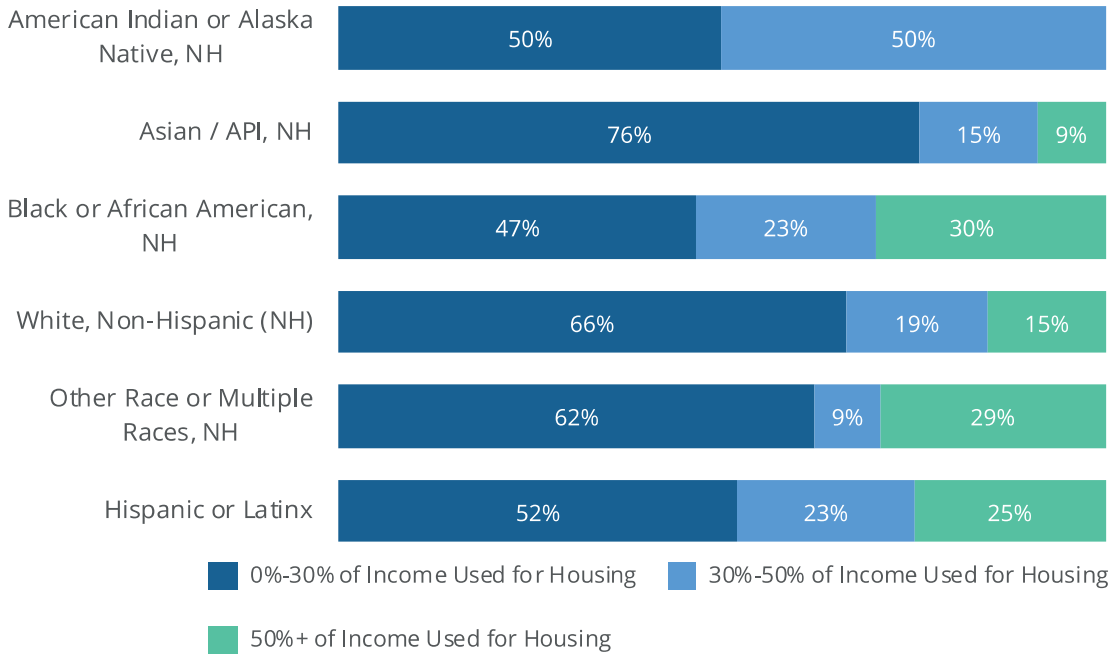
Source: ABAG Housing Needs Data Workbook

Figure IV-10.
Overpayment (Cost Burden) by Area Median Income (AMI), Belmont, 2019



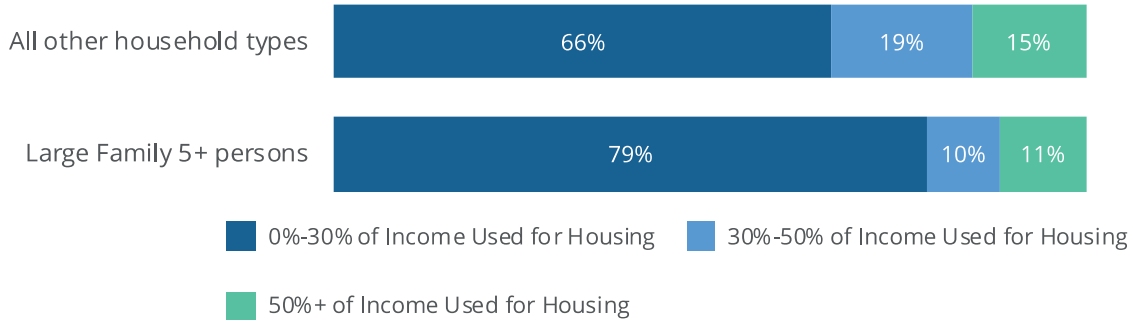
Source: ABAG Housing Needs Data Workbook

Figure IV-11.
Overpayment (Cost Burden) by Race and Ethnicity, Belmont, 2019



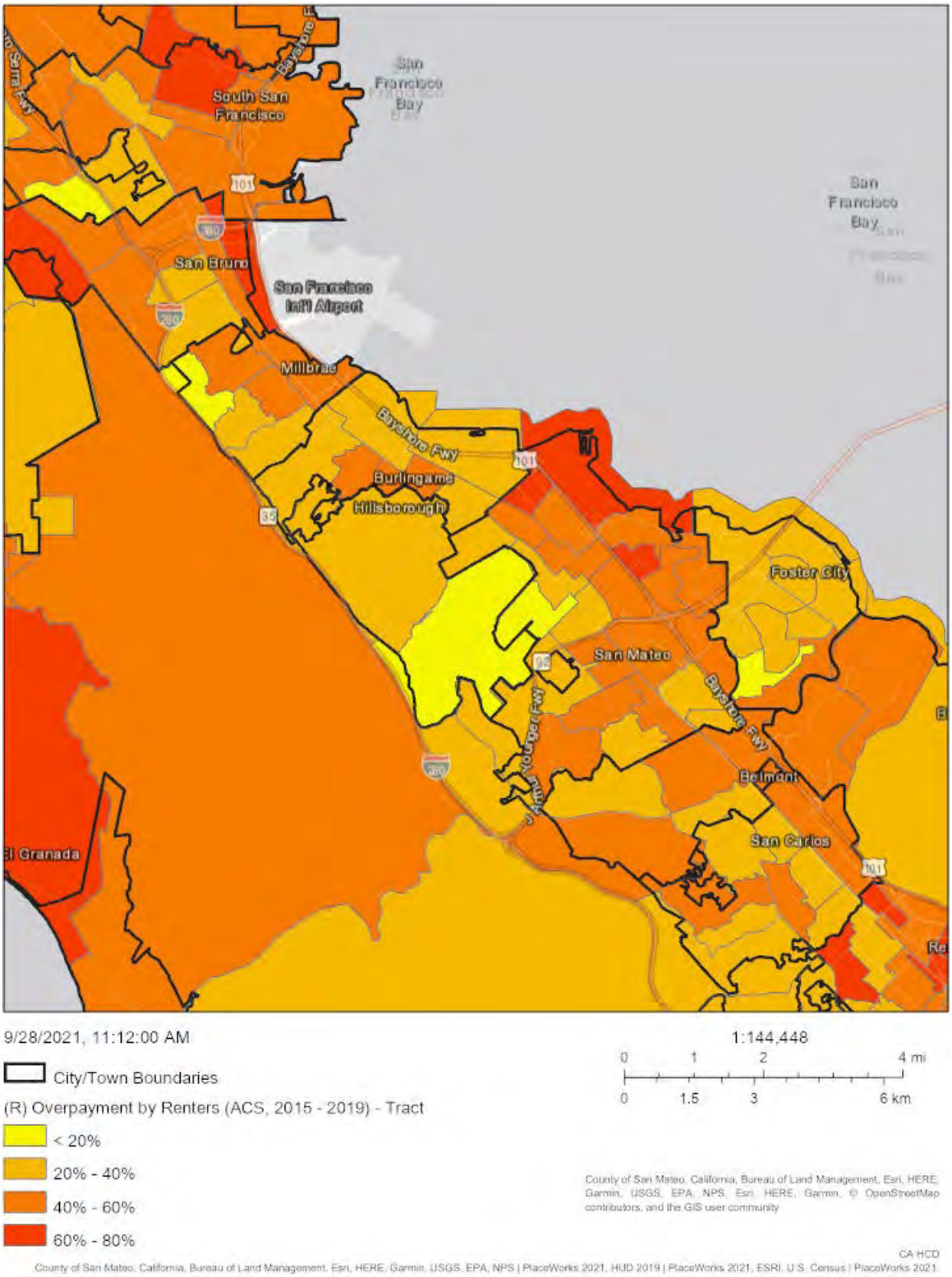
Source: ABAG Housing Needs Data Workbook

Figure IV-12.
Overpayment (Cost Burden) by Family Size, Belmont, 2019



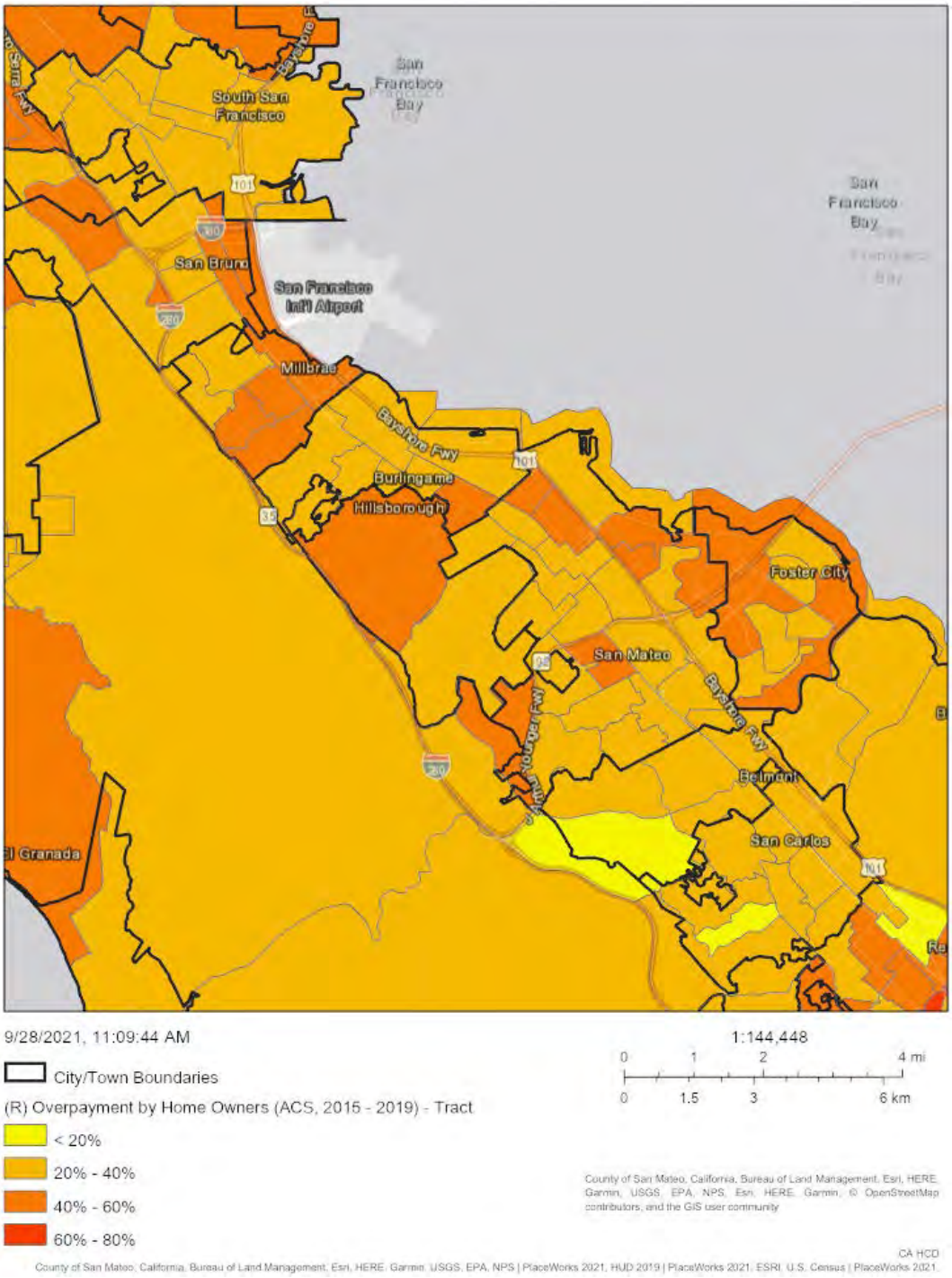
Source: ABAG Housing Needs Data Workbook

Figure IV-13.
Overpayment (Cost Burden) for Renter Households by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

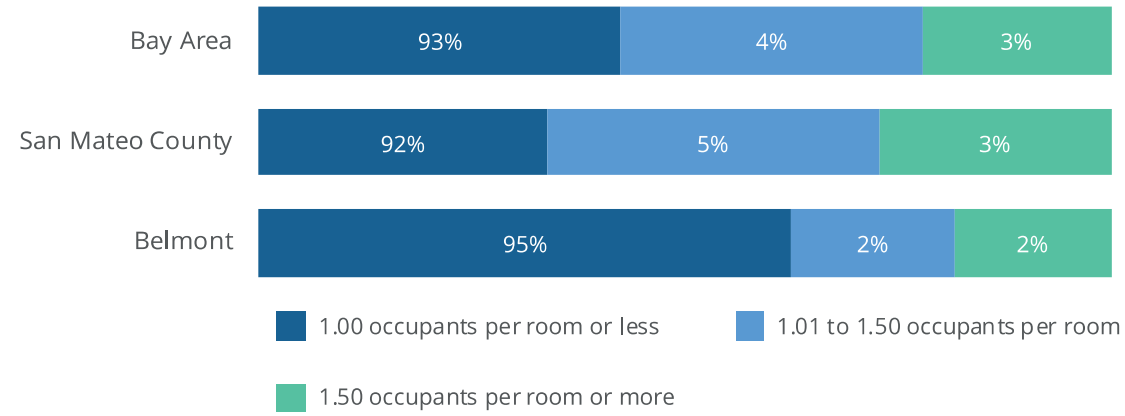
Figure IV-14.
Overpayment (Cost Burden) for Owner Households by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

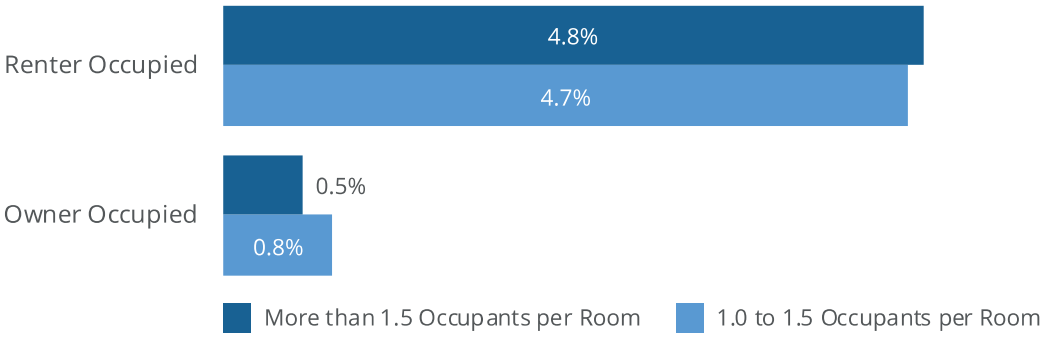
Overcrowding.

Figure IV-15.
Occupants per Room by Jurisdiction, 2019



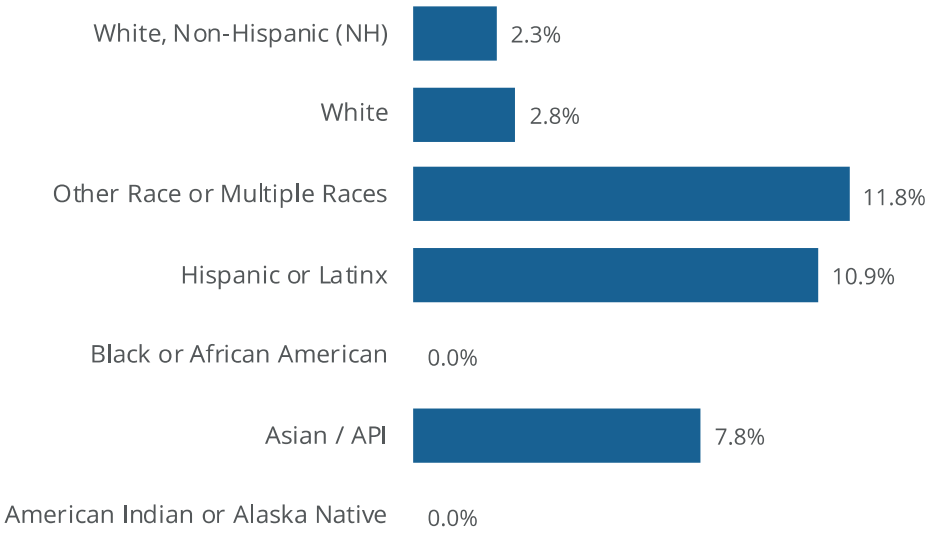
Source: ABAG Housing Needs Data Workbook

Figure IV-16.
Occupants per Room by Tenure, Belmont, 2019



Source: ABAG Housing Needs Data Workbook

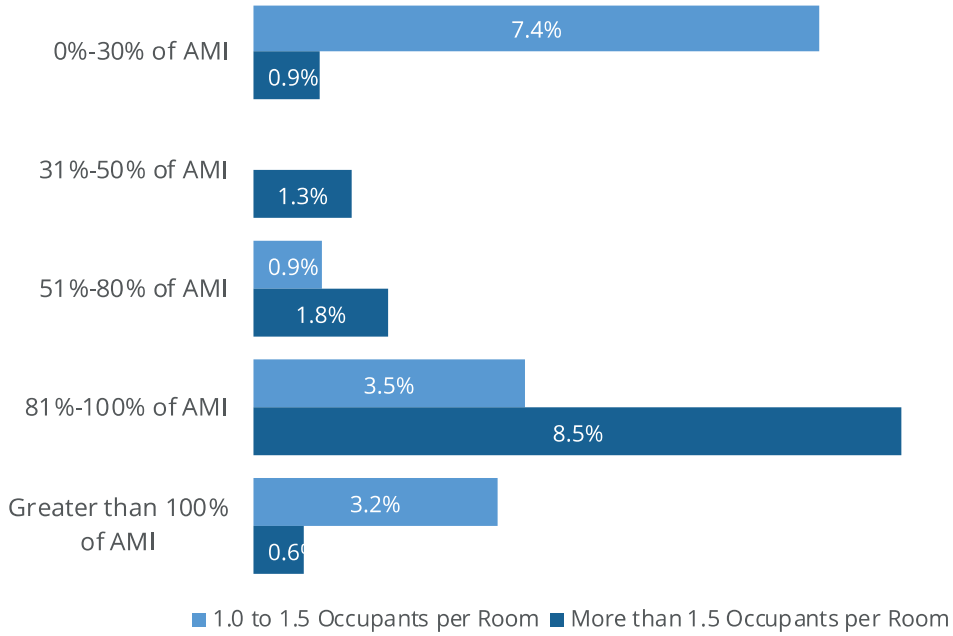
Figure IV-17.
Overcrowding by Race and Ethnicity, Belmont, 2019



Note: Overcrowding is indicated by more than 1 person per room.

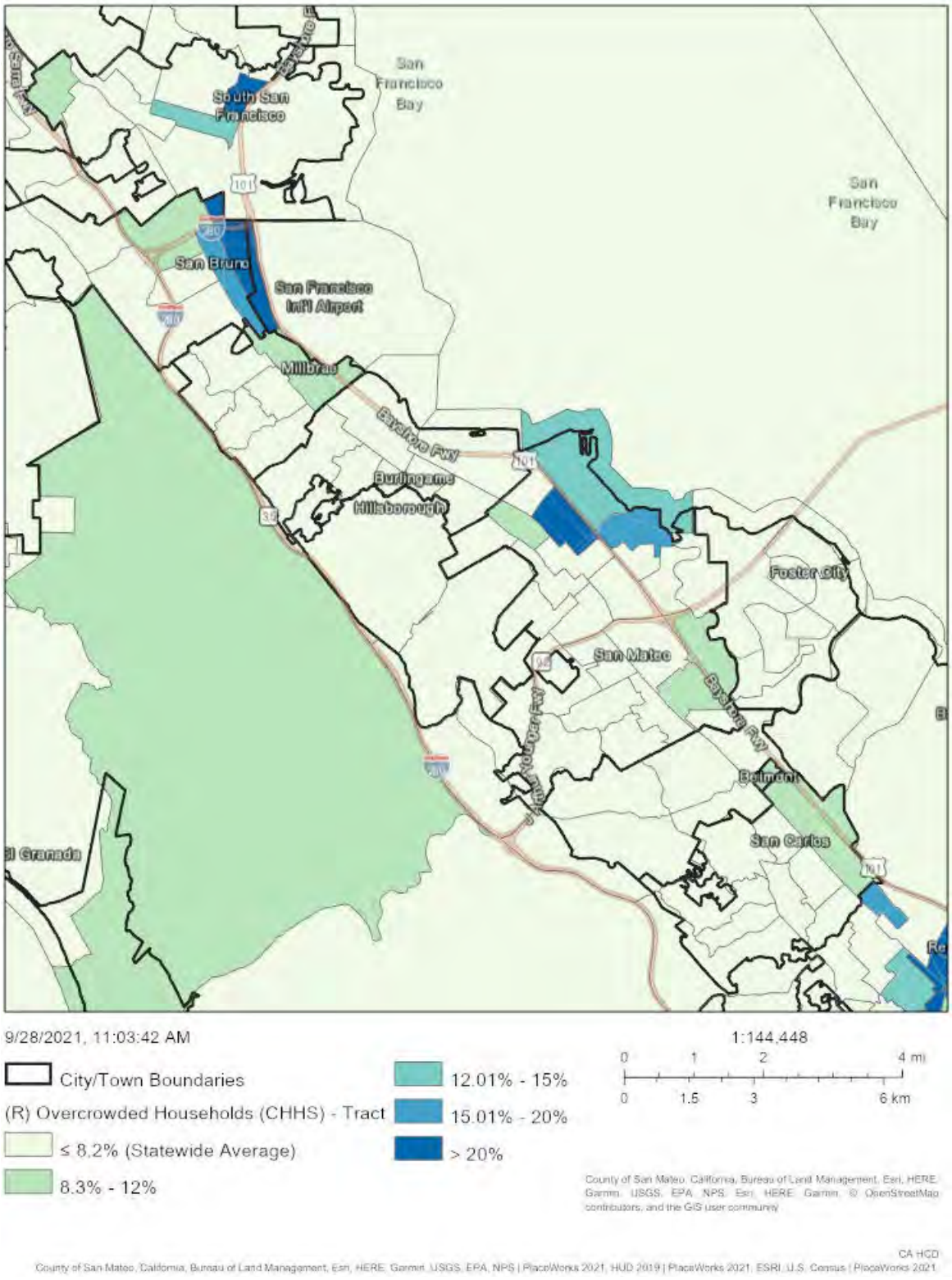
Source: ABAG Housing Needs Data Workbook

Figure IV-18.
Occupants per Room by AMI, Belmont, 2019



Source: ABAG Housing Needs Data Workbook

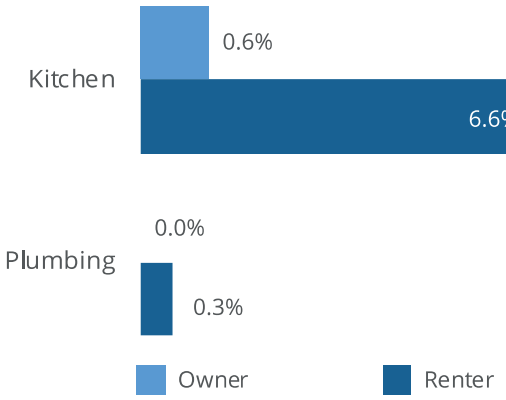
Figure IV-19.
Overcrowded Households by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

Substandard housing.

Figure IV-20.
Percent of Units Lacking Complete Kitchen and Plumbing Facilities, Belmont, 2019



Source: ABAG Housing Needs Data Workbook

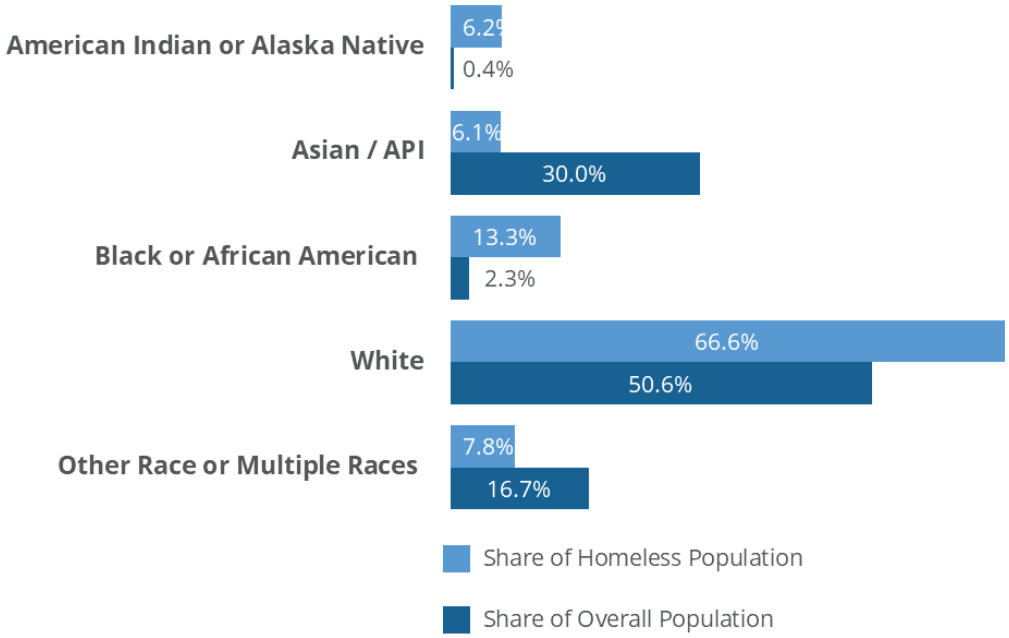
Homelessness.

Figure IV-21. Homelessness by Household Type and Shelter Status, San Mateo County, 2019

Source:
ABAG Housing Needs Data Workbook

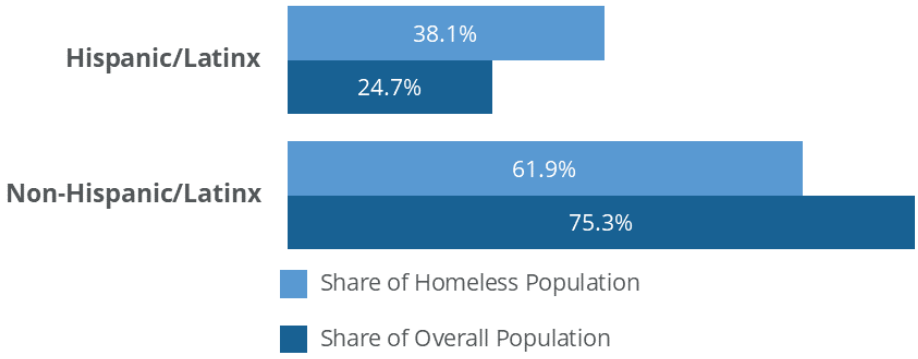
	People in Households Solely Children	People in Households with Adults and Children	People in Households Without Children
Sheltered - Emergency Shelter	0	68	198
Sheltered - Transitional Housing	0	271	74
Unsheltered	1	62	838

Figure IV-22.
Share of General and Homeless Populations by Race, San Mateo County, 2019



Source: ABAG Housing Needs Data Workbook

Figure IV-23.
Share of General and Homeless Populations by Ethnicity, San Mateo County, 2019



Source: ABAG Housing Needs Data Workbook

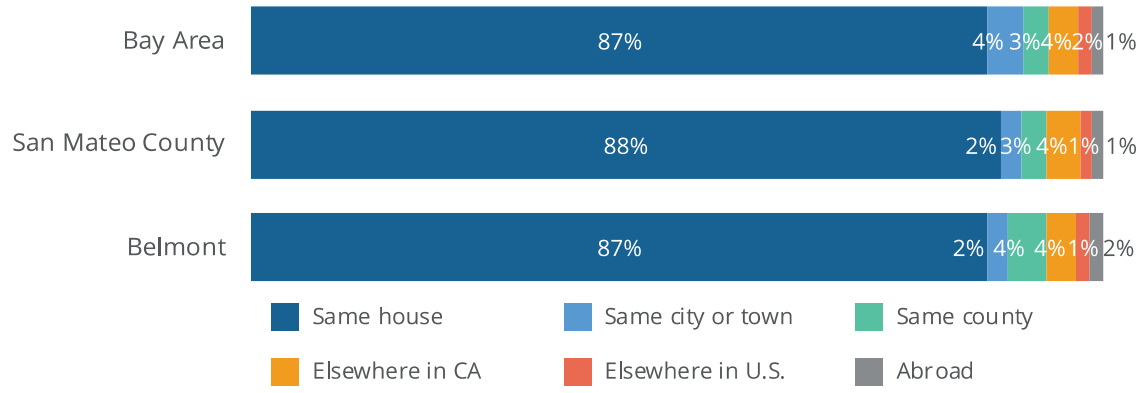
Figure IV-24.
Characteristics of the Population Experiencing Homelessness, San Mateo County, 2019

	Chronic Substance Abuse	HIV/AIDS	Severely Mentally Ill	Veterans	Victims of Domestic Violence
Sheltered - Emergency Shelter	46	0	70	31	10
Sheltered - Transitional Housing	46	3	46	4	14
Unsheltered	20	0	189	34	103

Source: ABAG Housing Needs Data Workbook

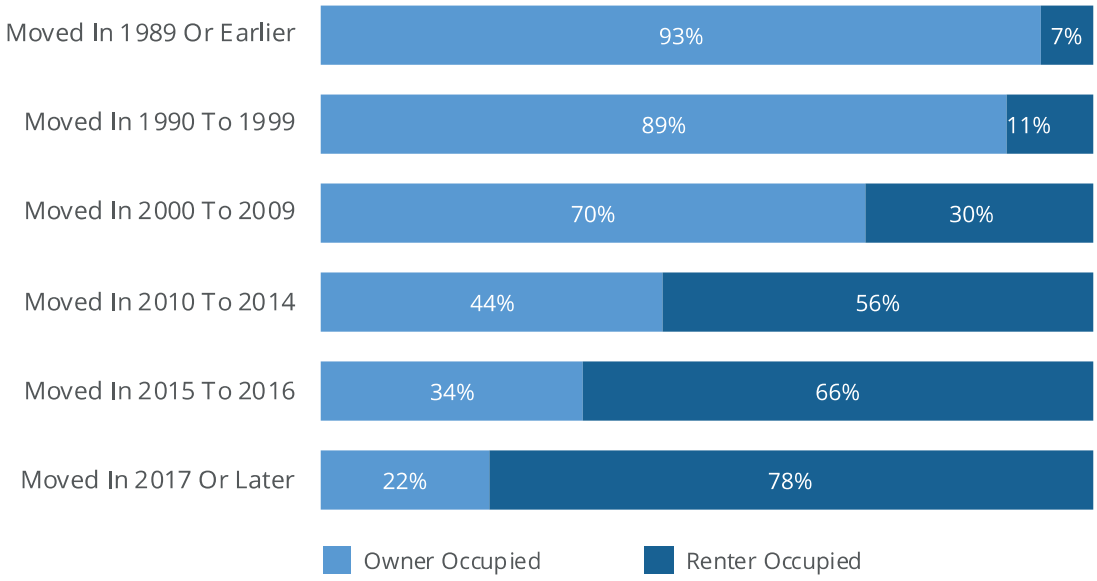
Displacement.

Figure IV-25.
Location of Population One Year Ago, Belmont, 2019



Source: ABAG Housing Needs Data Workbook

Figure IV-26.
Tenure by Year Moved to Current Residence, Belmont, 2019



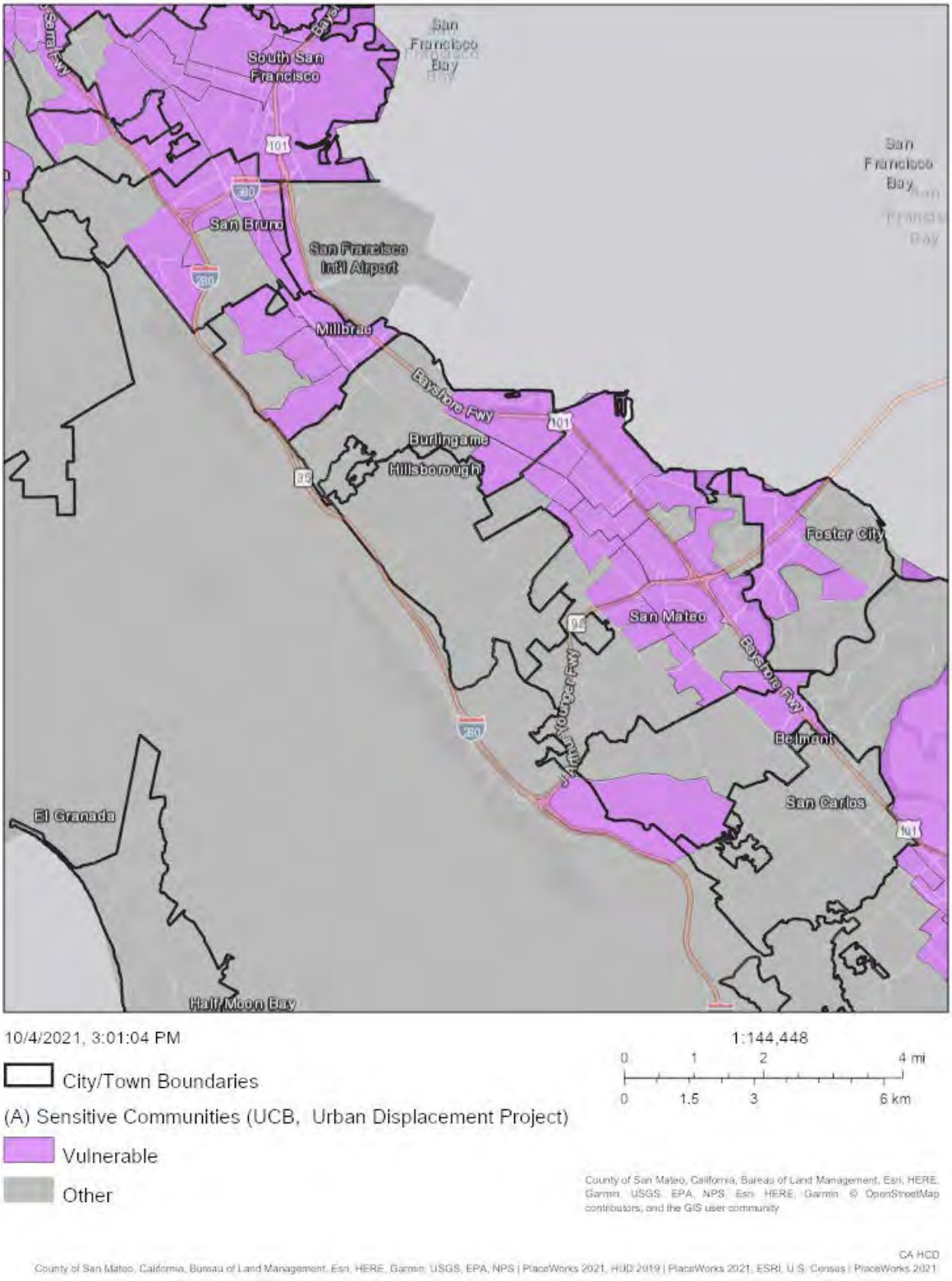
Source: ABAG Housing Needs Data Workbook

Figure IV-27.
Assisted Units at Risk of Conversion, Belmont, 2019

	Low	Moderate	High	Very High	Total Assisted Units in Database
Belmont	84	0	0	0	84
San Mateo County	4,656	191	359	58	5,264
Bay Area	110,177	3,375	1,854	1,053	116,459

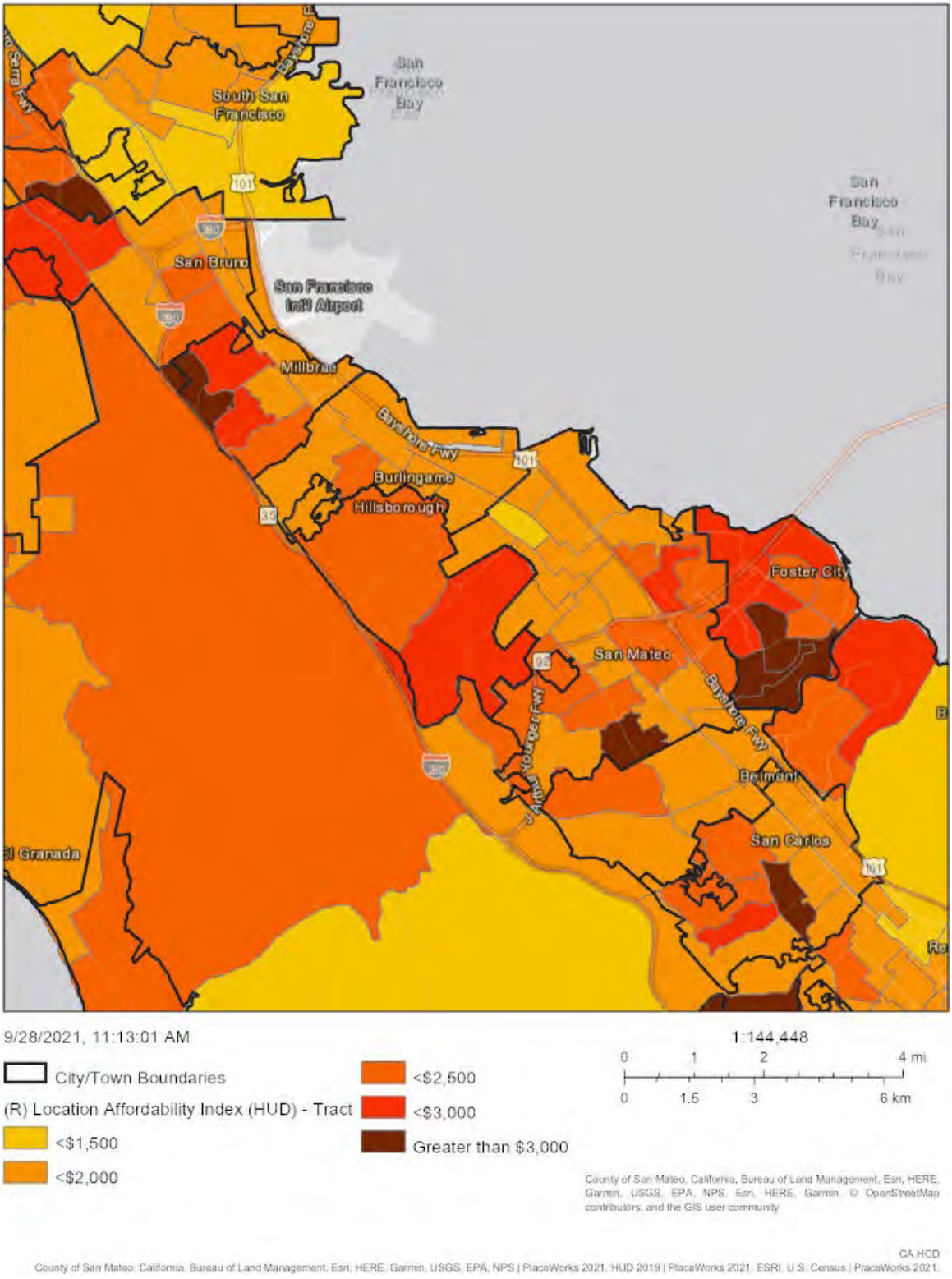
Source: ABAG Housing Needs Data Workbook

Figure IV-28.
Census Tracts Vulnerable to Displacement



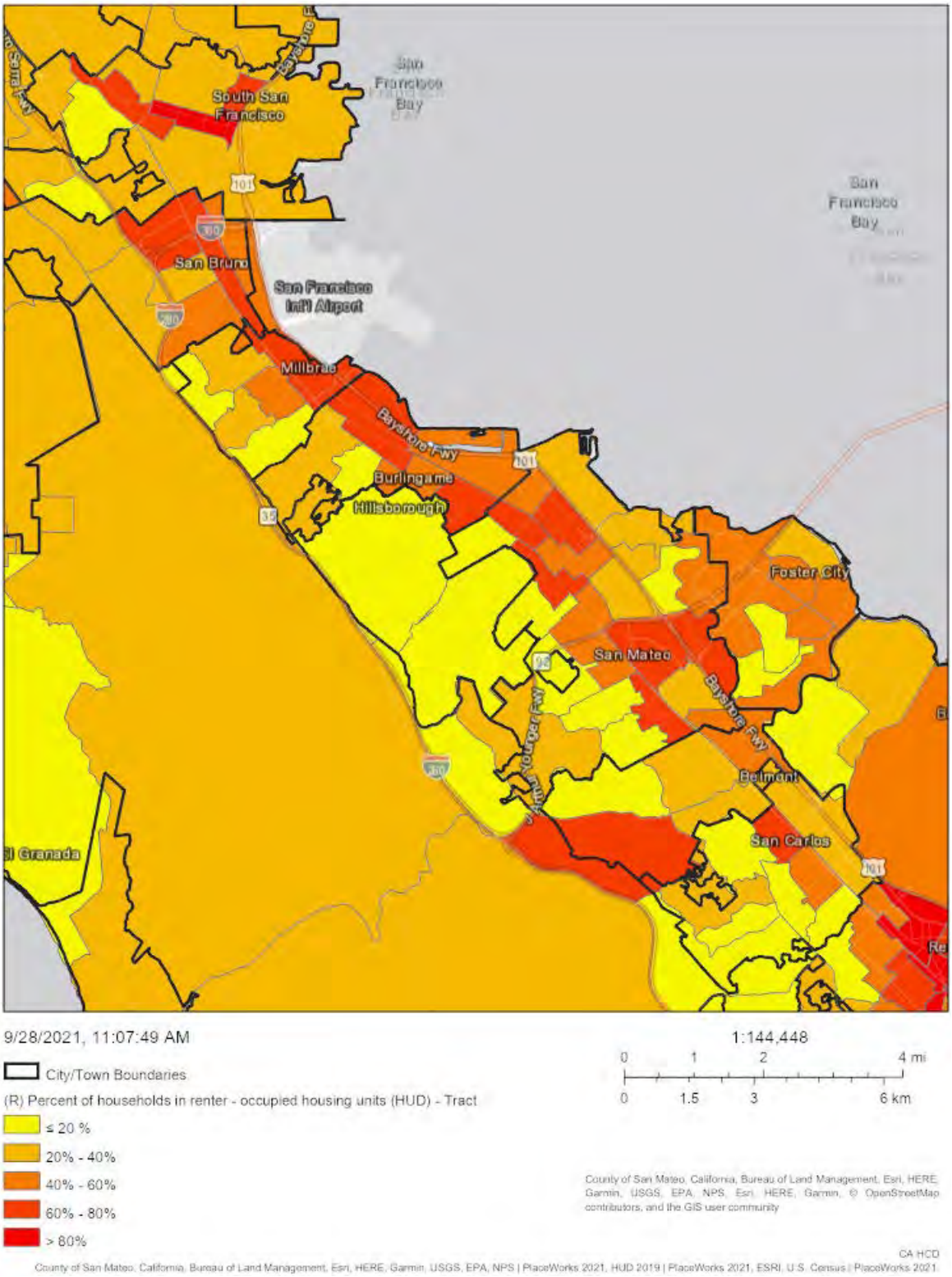
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure IV-29.
Location Affordability Index by Census Tract



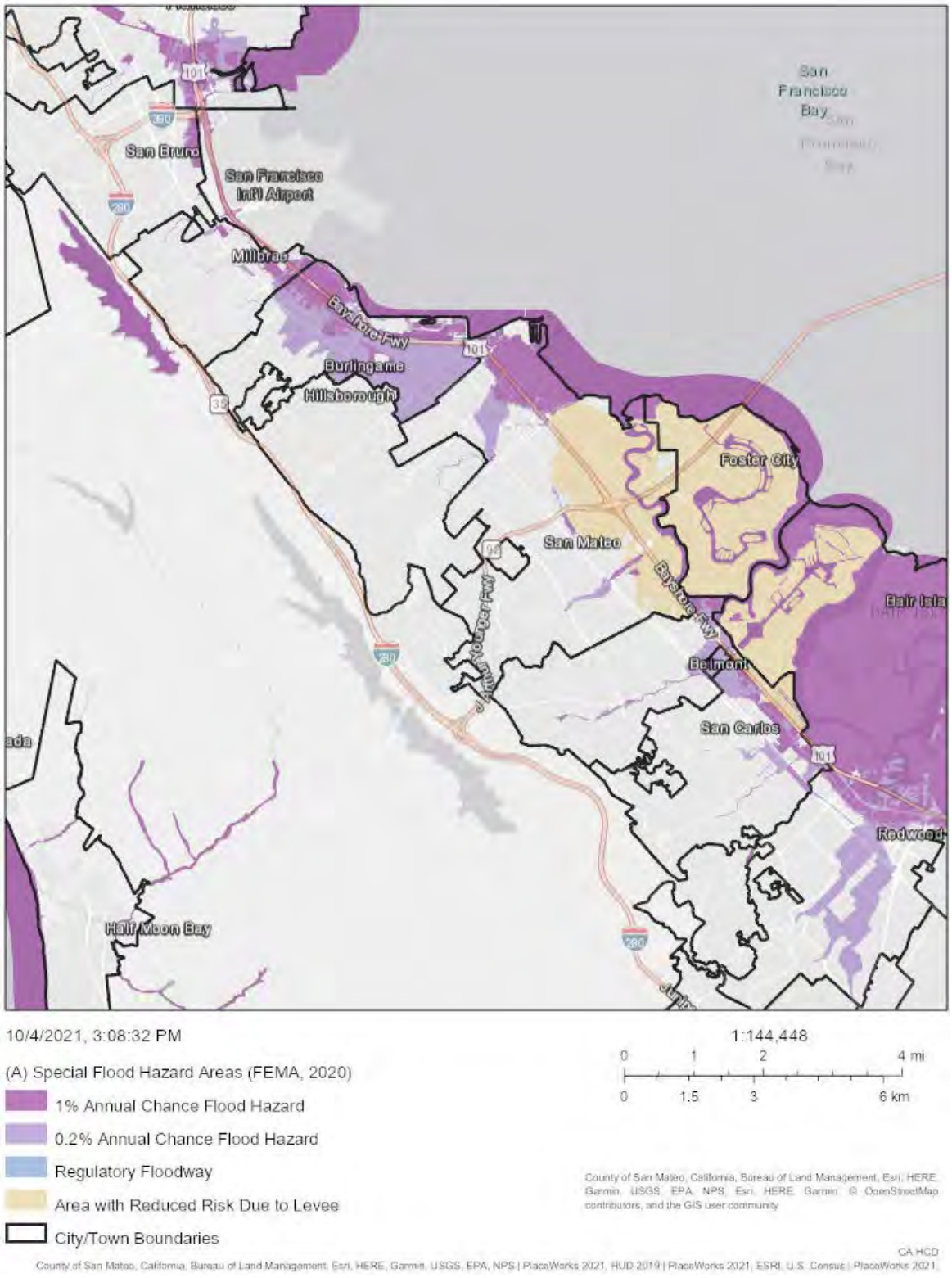
Source: California Department of Housing and Community Development AFFH Data Viewer

Figure IV-30.
Share of Renter Occupied Households by Census Tract, 2019



Source: California Department of Housing and Community Development AFFH Data Viewer

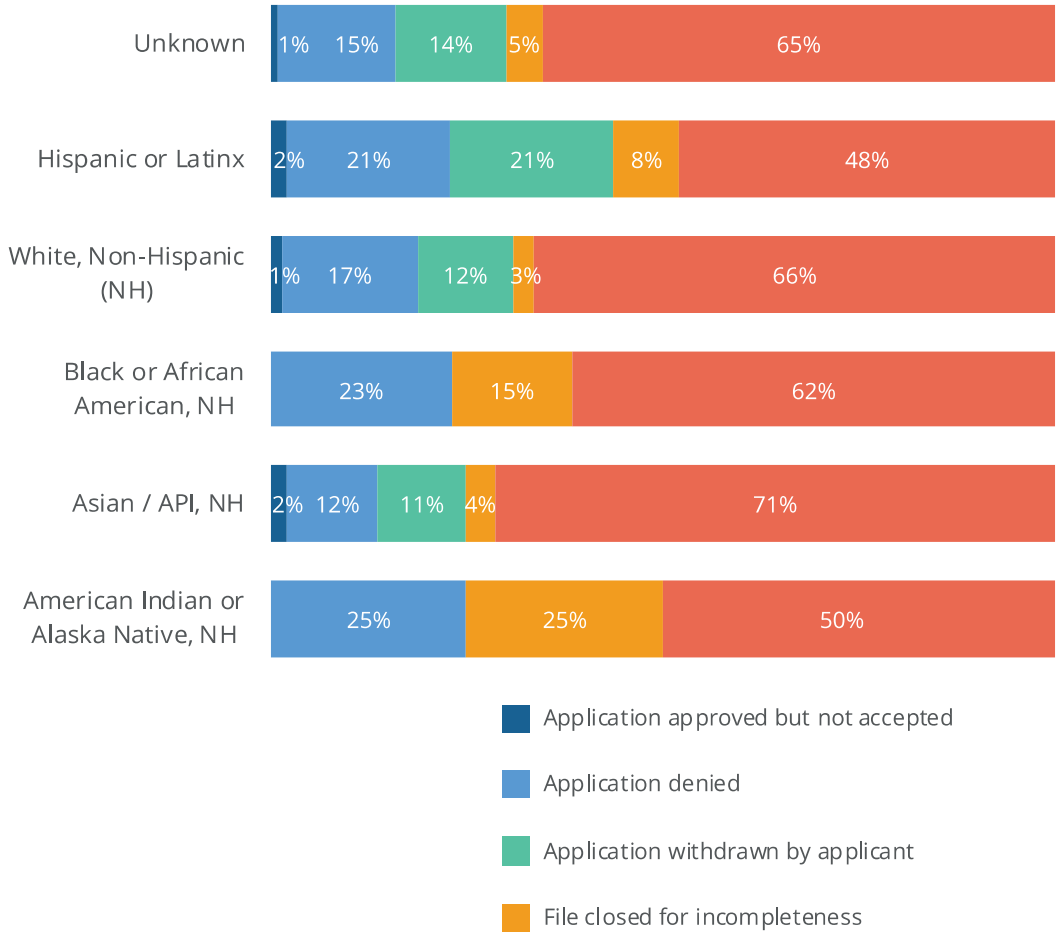
Figure IV-31.
Special Flood Hazard Areas, 2000



Source: California Department of Housing and Community Development AFFH Data Viewer

Other considerations.

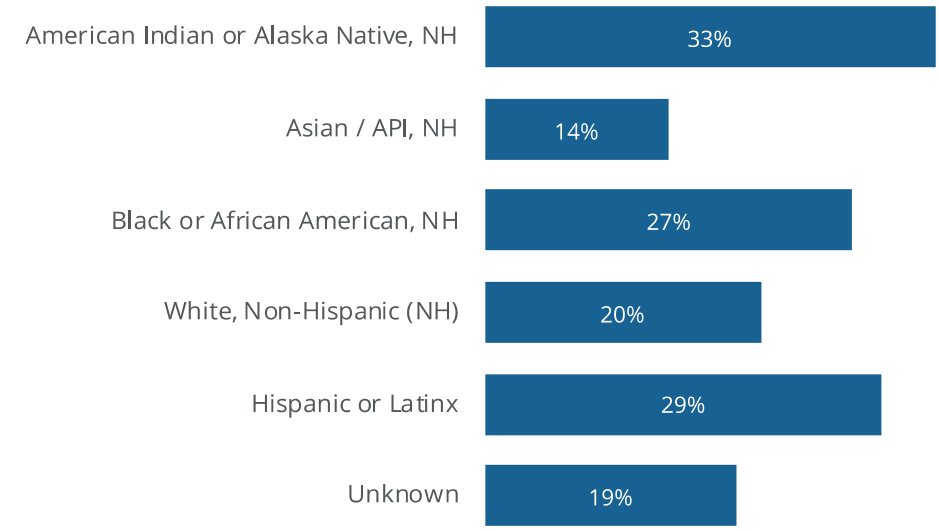
Figure IV-32.
Mortgage Applications by Race and Ethnicity, Belmont, 2018-2019



Source: ABAG Housing Needs Data Workbook

Figure IV-33.
Mortgage Application Denial Rate by Race and Ethnicity, Belmont, 2018-

2019



Source: ABAG Housing Needs Data Workbook

APPENDIX D: REVIEW OF PRIOR HOUSING ELEMENT GOALS, POLICIES, AND PROGRAMS

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2015-2023 Belmont Housing Element Performance Review

The update of our Housing Element provides an opportunity to reflect on past achievements and challenges, identifying what is working and what is getting in the way in meeting Belmont's housing needs.

The following summary highlights key accomplishments and challenges from the previous Housing Element's planning period (2015-2023). This information will help ensure that the updated element for 2023 to 2031 builds on success, responds to lessons learned and positions us to better achieve our community's housing priorities.

A more detailed program-by-program review of progress and performance is provided in the table to follow.

Past Achievements

There is a lot to be proud of as we reflect on implementation of the Belmont Housing Element over the past eight years:

- **We built more housing than ever before.** Belmont surpassed our total RHNA allocation for the 5th Housing Element cycle based on building permits issued, though not all affordability levels were met. This is an incredible leap from the previous housing cycle, where we only built 31 units in eight years. Between 2015 and 2022, we permitted a total of 715 units, a tremendous achievement which speaks to the significant work put in by our staff, Council, and the community. Permitted units included 510 above market rate multi-family units, 84 low-income multi-family units, 35 very low-income multi-family units, 11 extremely low-income multi-family units, 27 single-family homes, and 75 ADUs (see Table D-2).
- **We supported new affordable housing.** Through our Inclusionary Housing Ordinance, use of City land, and partnership with nonprofit housing developers, we have helped create 205 new affordable units that are providing much needed housing for our lower-income residents. Examples of new developments including affordable housing are:
  - Firehouse Square, across the street from the train station, built by MidPen Housing on City-owned land, providing 65 new units of affordable housing;
  - The ROEM Development at 803 Belmont Avenue, approved in May 2022 and starting construction in Spring 2024, consisting of 125 new affordable rental units;
  - Artisan Crossings, a 250-unit development completed in 2024 that includes 38 low-income units as a result of the City's inclusionary zoning requirements; and,

  - 815 Old County Road, a 177-unit development completed in 2024 that includes 27 low-income inclusionary housing units.

- **We laid the groundwork for a better planned city.** In 2017, we updated our General Plan for the first time since 1982, which will help ensure that we are planning for the future we want. We also adopted the Belmont Village Specific Plan, extended many of the more flexible zoning standards to all properties along the El Camino Real corridor, and created a new Corridor Mixed Use (CMU) zone along El Camino Real. We also went from zoning in terms of dwelling units per acre to floor area ratio (FAR), which has helped increase project densities and provide more housing units.
- **ADUs have ramped up.** Accessory dwelling units (ADUs), also referred to as second units or in-law units, have become increasingly popular after the City adopted a new ADU ordinance in response to changes in State law and removed its previous mandatory parking replacement policy. Interested homeowners can now add ADUs to their property more easily and many are, helping to create new rental housing in existing neighborhoods. Between 2018 and 2022, we permitted an average of 15 new ADUs per year; however, that number is increasing. The City issued permits for 27 new ADUs in 2022 and 21 in 2023.
- **We developed additional funding resources.** We have secured different financing sources to support our housing programs and services, including housing impact fees, commercial linkage fees, and inclusionary housing in-lieu funds.
- **We adopted an Anti-Displacement Policy.** As land values have increased and market rate housing developments have come in, there are concerns that lower-income residents and naturally occurring affordable housing (i.e., non-subsidized housing) are being displaced. In February 2022, the City adopted a Housing Preference Policy that prioritizes residents who live/work in San Mateo County or who have been displaced from a housing unit in San Mateo County in the last three years; this helps people stay in their communities and near their jobs.

As shown in tables D-1 and D-2, Belmont has made significant progress in approving and developing housing and meeting its RHNA obligations since 2015.

REMAINING CHALLENGES

While we got a lot done, there is a lot we still need to work on. One of the major challenges that kept us from achieving all our housing goals was limited staff capacity. Our staff is small, and we must address the needs of complex housing projects while also ensuring ongoing compliance with significant changes in State law pertaining to development review procedures. Additionally, once new units are built, they require ongoing management and compliance checks, which will stretch our staff resources even further.

TABLE D-1. ACCOMPLISHMENTS, 2015-2023

New Construction	ELI	VLI	LI	MOD	ABOVE MOD	Total
Single-family Residential Units (2015 -2022)	0	0	0	0	27	27
ADUs (2015-2022)	0	0	0	75	0	75
400 El Camino Real (The Ashton)	0	0	0	0	73	73
576-600 El Camino Real	0	0	0	0	32	32
Firehouse Square Phase 1 (Affordable)	11	35	19	0	1	66
1325 Old County Road (Artisan Crossings)	0	0	38	0	212	250
815 Old County Road	0	0	27	0	150	177
Firehouse Square Phase 2 (Market rate)	0	0	0	0	15	15
Total	**11**	**35**	**84**	**75**	**510**	**715**

Source: Belmont's Review of 2015-2023 Housing Element Performance

TABLE D-2. QUANTIFIED RHNA OUTCOMES, 2015-2023

Objectives vs. Actual by Income	RHNA	Actual	Percent of RHNA Met
Extremely low-income	63	11	17%
Very low-income	63	35	56%
Low-income	76	84	111%
Moderate-income	70	75	107%
Above moderate-income	200	510	256%
Total	**472**	**715**	**151%**

Source: Belmont's Review of 2015-2023 Housing Element Performance.

OPPORTUNITIES AHEAD

The following are things already in motion based on existing work efforts, trends, and lessons learned that we are incorporating in our updated Housing Element.

- **We are developing new ADU programs to do even more.** We plan to strengthen our city's ADU program by undertaking a second unit legalization program. This will make sure that second units which were constructed before the current ADU ordinances are incorporated into our legal housing stock once they meet all safety codes.
- **There are more incentives than ever to build housing.** For example, lot consolidation—which is linked to more efficient housing construction because of economies of scale—has historically been a challenge in Belmont. However, we are now seeing that these challenges are being overcome because of the market demand and housing needs. We've identified small sites that, when grouped together, can sustain housing developments, and we currently have a site consolidation program to facilitate that process.

- **We're prepared to handle our new housing targets.** Thanks to the updates of our General Plan and Belmont Village Specific Plan, we will be able to amend these documents to make sure we can plan for future RHNA numbers without needing to undertake major rezoning.

2015-2023 BELMONT HOUSING ELEMENT: EVALUATION

In addition to this status report, the State Department of Housing and Community Development has provided guidance on reporting about the impact of actions on special needs groups; specifically, "Provide a description of how past programs were effective in addressing the housing needs of the special populations. This analysis can be done as part of describing the effectiveness of the program if the jurisdiction has multiple programs to specifically address housing needs of special needs populations or if specific programs were not included, provide a summary of the cumulative results of the programs in addressing the housing need terms of units or services by special need group."

Because of its small size and the fact that it is not an entitlement jurisdiction with federal funds, the City does not provide direct services to individuals or households and as such does not have a mechanism for tracking services to special needs groups. In addition, with the dissolution of Redevelopment Agencies in 2012, the City lost its primary source of funding to assist in the development of affordable housing, including housing that would serve special needs groups. The following status update includes information on special needs groups only to the extent that information was made available to the City.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 1: Assure the quality, safety, and livability of existing housing and the continued high quality of residential neighborhoods.			
1.1 Code Enforcement	Action 1: Continue to implement code enforcement activities. Action 2: Maintain an inventory of code enforcement actions to determine citywide trends – such as overcrowding – and evaluate potential actions the City can take to counter these trends. Action 3: Code enforcement staff shall distribute information to property owners related to countywide rehabilitation programs and/or funding opportunities, as well as any local rehabilitation program opportunities made available by the Housing Successor, subject to availability of funding in the housing asset fund (Program 2.2)	All actions are ongoing and conducted by the Belmont Police Department. Effectiveness: Actions 1 and 2 have been effective in ensuring quality of housing stock. The data maintained by Code Enforcement suggests common themes for enforcement are more related to property maintenance, abandoned vehicles, noise, and smoking in multi-family housing units (prohibited in Belmont). Appropriateness: Ongoing need for standard code enforcement services conducted by the Belmont Police Department. Quantification: No quantification data available for this action. Special Needs Analysis: No information on special needs is available for this program.	Ongoing. Police Department will continue to administer code enforcement activities. The updated Housing Element includes a program to partner with organizations that provide repair and energy-efficiency improvements for properties occupied by low-income residents (Program H2.4) Code enforcement can continue to distribute fair housing and housing rehabilitation information.
1.2 Residential Records Report and Inspection Program	Action 1: Establish and maintain an Existing Conditions Survey for single-family properties. Action 2: Implement a two-year pilot Residential Records Report and Inspection Program. Action 3: Evaluate and determine whether to adopt a final Residential Records Report and Inspection Program.	No specific action to report on programs 1-3 This program has not been implemented due to lack of staffing resources to implement and sustain such a program. Permit Center staff continue to provide residential records data to interested parties to support real estate transactions and housing projects. Effectiveness: Not effective as it has not been implemented. Appropriateness: No longer needed. Quantification: No program activity. Special Needs Analysis: No information on special needs is available for this program.	Remove.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
1.3 Condominium Conversion Ordinance	Action 1: Continue to enforce the Condominium Conversion Ordinance.	Completed; ongoing. Effectiveness: Although the ordinance has not been used during the current planning period, it continues to be an effective mechanism for maintaining rental uses. Appropriateness: Ongoing need for this activity. Quantification: zero rental units converted to condominiums during the current period. Special Needs Analysis: No information on special needs is available for this program.	Ongoing. The City will continue to administer this ordinance as required by the Municipal Code. No new program required.
1.4 Preservation of Affordable Housing	Action 1: Continue to streamline and enforce the annual reporting required to verify income limits of affordable units with an emphasis on for-profit owners. Action 2: Provide technical assistance to property owners and/or organizations interested in purchasing and maintaining the properties should the owners be interested in selling as necessary and when feasible. Action 3: Adopt an ordinance for "At Risk" units requiring one-year notice to residents, the city, and the San Mateo County Department of Housing of all proposed conversions of subsidized housing units to market rents.	Actions 1 and 2 are ongoing. Action 3 – no ordinance has been adopted to date, but staff and project managers have complied with the recommended extended notification requirements. Effectiveness: Program has been effective in preventing loss of units at risk of conversion. Appropriateness: Ongoing need for this activity; additional modifications will assist in strengthening protections. Quantification: The City maintained 257 affordable housing units. Special Needs Analysis: Many of Belmont's subsidized housing units serve special needs populations, including lower-income households. While there is no risk of loss of subsidized units during the next planning period, the City will begin looking for long term sustainable solutions for affordable housing serving special needs groups.	Retain modified program to identify service provider to manage the rapidly growing portfolio of affordable housing units (Program H2.2).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
1.5 Anti-Displacement Policy	Action 1: Adopt appropriate programs and policies such as density bonus program and fair housing program to address displacement within 2 years of adoption of the housing element. Action 2: Monitor programs and policies annually for effectiveness. Action 3: Complete anti-displacement analysis through 21 Elements and anti-displacement nexus study.	Action 1: The City updated the Density Bonus program in 2014 to comply with State law. The City also adopted an anti-displacement housing preference policy in 2022 that prioritizes affordable housing units for people who live/work in San Mateo County or have been displaced from housing in the last three years. Action 2: Ongoing. Action 3: Ongoing. Effectiveness: Program will be effective in preventing loss of units at risk of displacement. Appropriateness: Ongoing need for this activity; additional modifications will assist in strengthening protections. Quantification: This program does not have quantifiable activity to report. Special Needs Analysis: The adopted housing preference policy helps income-qualified Belmont and San County residents from being displaced from the community as housing prices continue to rise.	Retain revised tenant protections program (Program H5.6).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 2: Facilitate the development of a variety of housing types at appropriate locations.			
2.1 Affordable Housing Development	Action 1: Work to have legalization / amnesty program for ADUs Action 2: Transfer or sell real property assets to leverage provision and development of affordable housing projects for all income groups including extremely low, very low, and low-income households. Action 3: Complete the San Mateo County-Wide Affordable Housing Nexus Study by February 2015. Action 4: Develop and Implement an Inclusionary Housing Ordinance and adopt Housing Impact Fees by December 2015. Action 5: Ensure ongoing compliance with California Health and Safety Code.	Action 1: No activity. Action 2: The City has identified a tentative owner for two special needs group homes; County of San Mateo took actions to forgive outstanding debts on these properties. Tenant Relocation Plan and Housing Replacement Plans were adopted in March 2019; Tenants were successfully relocated in July and August 2019, Sale of four properties anticipated to close in July 2022 and proceeds from market rate sales will be used to fund pipeline 100% affordable housing projects. Actions 3 and 4: Inclusionary Ordinance adopted January 2017; Inclusionary rental ordinance adopted Fall 2018; Nexus study available. Completed. Action 5: Ongoing. Effectiveness: Program has been effective in creating new affordable units through both funding mechanisms and creating BMR units. Appropriateness: Ongoing need for this activity; additional modifications will assist in addressing deeper affordability and assistance to special needs households. Quantification: Belmont generated $2.9M from sale of three real property assets (3 units) that the City has allocated to two pipeline affordable housing projects that will produce 162 new affordable units. The Belmont Inclusionary Ordinance has generated $766,369 of in-lieu fees and 102 restricted affordable housing units (65 units completed in 2023, 37 units recently approved). Special Needs Analysis: The City has allocated $3.5M of housing funds to projects that include lower-income units and a 5% unit set aside for households at risk of homelessness (per San Mateo County AHF).	Retain revised program to use public funds for development of lower-income housing (Program H1.2).

2.2 Affordable Housing Rehabilitation, Operation, and Management	Action 1: Continue to annually monitor City-owned rental properties to ensure that affordability is being maintained. Action 2: In compliance with SB 341, the Housing Successor must initiate activity on affordable housing real property assets by August 31, 2017. By June 2015, the Housing Successor shall work with the City Attorney to clarify permitted uses of real property assets. Action 3: By December 2015, the Housing Successor shall hold meetings with San Mateo County affordable housing developers/service providers to determine what opportunities are available for rehabilitation of housing units in Belmont. Action 4: By December 2016, the Housing Successor shall develop a housing asset funds disposition program (subject to funding availability) that provides local funding for rehabilitation of existing housing units. Action 5: By June 2017, the Housing Successor shall develop and implement a housing rehabilitation outreach program (subject to funding availability). Information shall be posted to the City of Belmont website and distributed to residents via code enforcement staff (Program 1.1).	Action 1: Annual, completed, ongoing. Action 2: June 2015, completed. All Housing Successor properties have been rezoned via Belmont Village Specific Plan and El Camino Corridor mixed-use zoning policies, several properties subject to RFP process and new housing development proposal. Action 3: December 2015, the city held meetings with affordable housing developers to discuss opportunities for rehabilitation projects. No sites identified. Action 4: December 2016, The City Housing Successor maintains an Affordable Housing Fund that is funded by housing impact/mitigation fees, and other developer contributions. The City of Belmont committed $5.65 million towards the Belmont Firehouse Square affordable housing project which is now under construction. Further funding to be acquired through generative properties. Action 5: No activity to report. Effectiveness: Program has been effective in retaining units in the housing stock. Appropriateness: Ongoing need for this activity; additional modifications will assist in addressing deeper affordability and assistance to special needs households. Quantification: The City invested land and $5.65M of Low-Moderate Income (LMI) housing funds in the Firehouse Square Project. The City committed an additional $3.5M towards two additional affordable housing projects. The program has not yet facilitated housing unit rehabilitation. Special Needs Analysis: Projects that have or will receive affordable housing funds from the City of Belmont maintain a minimum 5% unit set aside for households at risk of homelessness and include restricted lower-income housing units.	The Housing Element includes a revised program to partner with organizations that provide repair and energy-efficiency improvements for properties occupied by low-income residents (Program H2.4).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.3 Belmont Village Priority Development Area Strategy	Action 1: Adopt new comprehensive zoning regulations for the Belmont Village Priority Development Area. The zoning will: ▪ Allow high-quality, mixed-use, high-density (30-45 units/acre), 40-50 foot-tall development; ▪ Consider alternative parking arrangements such as shared parking, parking districts, or requirement for parking to be behind primary buildings; Streamline the development process; and ▪ Incorporate provisions to protect the economic viability of existing commercial uses, while considering the quality of life for new residents. Action 2: Adopt design guidelines for the Villages of Belmont Area to clarify requirements and facilitate the development review process. Action 3: Adopt Belmont Village Specific/Implementation Plan using C/CAG PDA Planning Grant Funds. Action 4: Replace the Downtown Specific Plan with a new Belmont Village Specific/ Implementation Plan in the General Plan.	Action 1: Completed December 2015. Action 2: Completed December 2015. Action 3: Completed June 2016. Action 4: Completed June 2016. All actions completed as of November 2017. Effectiveness: Program has been creating zoning regulations to facilitate new housing development. Appropriateness: As these actions are completed, no additional need for them. Quantification: Through June 2023, five multi-family housing projects have been approved and permitted in either the BVSP area or along the El Camino Real corridor, resulting in construction of 670 new multi-family housing units. Special Needs Analysis: No information on special needs is available for this program.	Completed, remove. The Housing Element includes a new program to modify CMU zoning district to eliminate maximum density and allow increased FAR to align with the successful BVSP zoning standards (Program H4.1, completed January 2024).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.4 Developer Outreach	Action 1: Revise development review process and permit materials to be distributed at the permit center and on the City's website to explain the various steps in the process. This includes what materials need to be submitted and when and how long review will take at each juncture. Action 2: Continue to meet with private and nonprofit housing developers on a regular basis. Consider hosting an annual developer roundtable to discuss development opportunity sites and other development issues.	Action 1: June 2015, completed. Significant overhauls to the design review process adopted in 2015 and 2016. Website upgraded, planning and building application materials upgraded and modernized. Action 2: Ongoing, regular meetings with affordable housing developers to discuss opportunities in the City of Belmont. Effectiveness: Program has been effective in developing positive relationships with developers and providing critical information to them. Appropriateness: Ongoing need for this activity; additional modifications will help strengthen resources available to facilitate development. Quantification: No quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	A new program has been included to ensure information and materials related to streamlined development review options (SB 35) are available on the City website, at City Hall, and that staff are prepared to implement streamlined review (Program H4.6).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.5 Site Consolidation	Action 1: Develop, adopt, and implement a lot consolidation program to allow for the assembly of multiple continuous parcels. The program will consider incentives such as: ▪ Density bonuses (Program 4.3), ▪ Direct Affordable Housing funds to leverage consolidation (Program 2.1), and other available incentives. Action 2: The Housing Successor Agency will work directly with property owners and affordable housing developers to facilitate consolidation of parcels by: ▪ Conducting an outreach program beginning in Spring 2015 to potential affordable housing developers; ▪ Providing a map of opportunity sites, such as the ones identified in the Housing Element, on the City's website as well as on handouts at the Permit Center, by December 2015; and, ▪ Evaluating the potential to vacate alleys or rights-of-way that are no longer needed for public use for consolidation with adjacent sites.	Action 1: Density bonus program updated and City financial assets applies to project consolidating smaller lots. Action 2: Map created discussions ongoing, no other specific action to report. Effectiveness: Program has been moderately effective, since small lot consolidation has not been a significant constraint in Belmont. Appropriateness: Current program actions no longer needed. Create new program to offer financial incentive for projects that include lower-income housing units. Quantification: The City has approved and permitted eight multi-family housing projects during the 5th cycle planning period, all of which required lot consolidations. These lot consolidations will facilitate development of 789 new multi-family housing units. Special Needs Analysis: No information on special needs is available for this program.	Small lot consolidation has not proven to be an ongoing governmental constraint based on the City's current development pipeline. A table showing development of housing on non-vacant sites is included in the *Chapter 6, Adequate Sites*. The updated Housing Element includes a program to waive lot consolidation fees for projects that provide very and extremely low-income housing units (Program H4.3).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.6 Second Units	Action 1: Modify the Second Dwelling Unit zoning requirements and permitting process to facilitate the development of new second dwelling units. Action 2: Develop a Second Unit Legalization Program, which would potentially provide incentives to legalize non-recognized second units. Action 3: Analyze existing secondary dwelling unit ordinance to ensure compliance with State law, and update the zoning ordinance as necessary.	Actions 1 and 3: Completed. The City adopted modifications to the zoning ordinance and streamlined the processing time for second dwelling units. A corresponding increase in production of accessory dwelling units has followed. Action 2: The City was awarded $160,000 of SB2 Planning Grant Program funds; the grant application specified that a portion of the funds could be utilized to promote ADU production/legalization, including consideration of an amnesty program. Effectiveness: Program has been effective in developing new ADUs. Appropriateness: Ongoing need for this activity; additional modifications will help strengthen resources available to facilitate development. Quantification: From 2017 through 2022, Belmont issued building permits for 74 new accessory dwelling units. Special Needs Analysis: ADUs often provide naturally affordable units that are smaller in size and more accessible to renters.	Revised programs are proposed that incentivize ADU development during the next planning period through a series of targeted actions (Programs H5.9, H5.10, H5.11, and H5.12).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.7 Promotion of Small Lot Development	Action 1: Consider allowing development standards to be modified for small lots, rather than requiring applicants to apply for a variance or a zone change, if projects can demonstrate that they comply with design guidelines and do not cause substantial adverse impacts on adjoining properties. Action 2: Consider working with affordable housing developers and/or management companies to manage groups of smaller housing developments in order to create economies of scale and support affordable housing development.	Action 1: December 2015. No activity to report. Action 2: December 2017. No activity to report. No specific activity to report on either action. Effectiveness: Program has been moderately effective, since small lot consolidation has not been a significant constraint in Belmont. Appropriateness: Lot consolidation has reduced reliance on development of stand-alone small lots. No longer needed. Quantification: Small lot consolidation has facilitated development of five multi-family housing projects and 613 new multi-family housing units. Special Needs Analysis: No information on special needs is available for this program.	Remove prior actions. Following adoption of the Belmont Village Specific Plan and creation of the Corridor Mixed Use (CMU) Zoning district, the City has seen a significant decrease in request for variances and zoning changes because the new zoning regulations are flexible and allow for mixed-use development activity in the priority development areas. A new program has been included to waive lot consolidation fees for projects that provide very- and extremely low-income housing units (Program H4.3).
2.8 El Camino Real Transit Corridor	Action 1: Adopt zone texts amendments for properties along the El Camino Real transit corridor to facilitate mixed-use and development of a variety of housing types, and allowing up to 45 dwelling units per acre when certain design criteria are met. Action 2: Consider modifying the zoning requirement for a Conditional Use Permit for all multi-family development projects.	Action 1: Completed. Adopted Nov. 2017 Action 2: Completed. Adopted December 2016. Effectiveness: Program has been effective in creating greater opportunities for higher-density multi-family developments. Appropriateness: As these actions are completed, no further need. Quantification: no quantifiable activity to report. Special Needs Analysis: High-density zoning standards have helped facilitate an increase in housing development activity which continues to generate new inclusionary affordable housing units.	Remove; completed.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.9 Belmont General Plan Update	Action 1: Prepare and Adopt update to Belmont General Plan 2035. Action 2: Prepare and adopt Program Environmental Impact Report that analyzing forecasting development within the Belmont Village Priority Development Area and along the El Camino Real corridor.	Action 1: Completed. Adopted November 2017. Action 2: Completed. Adopted November 2017. Effectiveness: Program has been effective in implementing zoning text amendments. Appropriateness: As these actions are completed, no further need. Quantification: Since the General Plan and EIR were adopted in 2017, seven multi-family housing projects have been able to tier off the previously completed environmental review (CEQA exemptions of Addendum to the General Plan EIR), resulting in expedited development review of 789 new housing units. Special Needs Analysis: No information on special needs is available for this program.	Remove; completed.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
2.10 Update Residential Development Standards	Action 1: By Spring 2015, adopt zone text amendments amending residential development standards and design review thresholds. Action 2: By Summer 2015, adopt revisions to the Belmont Tree Ordinance.	Action 1: Completed. Adopted 2015 and 2016. The City adopted comprehensive modifications to residential design standards and the design review process, making it easier for residents to make improvements to existing housing stock, and increasing the number of new dwelling proposed on the few remaining vacant sites. Action 2: Completed. Adopted Nov 2017. Effectiveness: Program has been effective in implementing new development standards. Appropriateness: As these actions are completed, no further need. Quantification: In addition to 41 new single-family residential homes being built during the current planning period, Belmont has processed 271 single-family design review applications under the City's recently adopted tiered residential design review standards that allow more building additions and remodels to be approved by the zoning administrator in a streamlined timeframe. Special Needs Analysis: No information on special needs is available for this program.	Remove; completed.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 3: Expand and protect housing opportunities for all economic segments and special needs groups within the community.			
3.1 Mortgage Credit Certificate	Action 1: Actively educate prospective buyers about the program by distributing materials, posting materials on the City website, and meeting with realtors and homebuilders.	Action 1: Ongoing. The City of Belmont, in partnership with HEART of San Mateo County, hosted a first-time homebuyer workshop in April 2019. Options for first-time and low-income homebuyers was distributed and posted to the City's Website. Effectiveness: Program has been effective in helping residents learn about housing opportunities. Appropriateness: Ongoing need for this activity. Quantification: The City hosted one first-time homebuyer workshop. Special Needs Analysis: No information on special needs is available for this program.	The City will continue to partner with HEART to promote home ownership opportunities and programs. Program H3.1 commits the City to hosting first-time homebuyer workshops during the next planning period.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
3.2 Section 8 Rental Assistance	Action 1: Set up a meeting between City and County staff members responsible for the Section 8 program so that City staff become better educated about the opportunities available through the program. Action 2: Publicize Section 8 by posting information about the program on the City's website and make information available at the Permit Center. Action 3: Encourage new housing developers and management companies to participate in the Housing Choices Voucher Program or the Project-based Program during preparation of future development agreements or affordable housing programs.	Action 1: Completed and ongoing. The City has established a line of communication with the County to ensure Belmont Affordable Housing projects are considered for project-based vouchers. So far two projects have been awarded vouchers. Action 2: Ongoing. No specific activity to report. Action 3: Completed and ongoing. The City has partnered with two affordable housing developers for two City-owned project sites to building over 100 affordable housing units. In 2019 both developers were awarded project-based vouches from San Mateo County Department of Housing. Effectiveness: Program has been effective in helping residents learn about housing opportunities through the Section 8 program. Appropriateness: Ongoing need for this activity; modifications will help strengthen the ability to reach more people about the requirements. Quantification: Two affordable housing projects in Belmont have been awarded project-based vouchers that will help support lower-income households. Special Needs Analysis: Project based vouchers will support lower-income households.	Retain updated program. The Housing Element includes Program H5.1 focused on improving access to housing information to address the lack of access to information about fair housing rights, including Section 8 program information and rules.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
3.3 Non-profit Assistance	Action 1: Continue to provide financial assistance to community service organizations such as HIP Housing, when financially appropriate. Action 2: Publicize the programs through its website, and flyers at the permit center and senior and community center.	Actions 1 and 2: Completed and ongoing. The City continues to provide direct financial assistance to HIP Housing and has met with Project Sentinel representatives to help promote their housing services to residents. The City Website now includes links to various housing nonprofit organizations. Effectiveness: Program has been effective in targeting assistance to nonprofits. Appropriateness: Ongoing need for this activity. Quantification: During the current housing element planning period, Belmont contributed $40,000 to HIP Housing to support administration of their Home Sharing program and other housing programs targeting lower-income households in the City of Belmont. Special Needs Analysis: Both HIP Housing and Project Sentinel provide programming and outreach to special needs populations, including households as risk of homelessness.	Ongoing; the City will continue to provide financial resources and/or program outreach support to HIP Housing, HEART, Project Sentinel, and other housing organizations that support special needs groups or lower-income households.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
3.4 HEART	Action 1: Continue to participate in HEART, or other comparable programs. Action 2: Actively publicize the revolving affordable housing loan program and First-time Homebuyers loan program available through HEART.	Action 1: Completed and ongoing. The City is an active participant in HEART and provides an annual member agency contribution. Action 2: Completed. The City of Belmont hosted a HEART First Time Homebuyer workshop in April 2019. Effectiveness: Program has been effective in targeting assistance to nonprofits. Appropriateness: Ongoing need for this activity. Quantification: The City partnered with HEART to host one first-time homebuyer workshop during the current planning period. Special Needs Analysis: No information on special needs is available for this program.	Ongoing, the city will continue to be a HEART member agency and the Housing Element includes a new program to partner with stakeholders, including HEART, to offer first time homebuyer workshops in Belmont (Program H3.1).
3.5 Emergency Shelters	Action 1: Develop a partnership with Shelter Network to support their efforts to house homeless families and individuals. Action 2: Review Emergency Shelter zoning regulations for ongoing compliance with state law (annually).	Action 1: Ongoing. No specific activity to report. Action 2: Completed and ongoing. The city ensures ongoing compliance. Effectiveness: Program has been effective ensuring the City complies with the requirements to allow emergency shelters. Appropriateness: Ongoing need for this activity; modifications will update to include low-barrier navigation centers. Quantification: No quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program during the previous planning period.	Retain updated program to update the Zoning Ordinance to define low-barrier navigation centers and allow them in the same zones where emergency shelters are permitted (Program H4.1).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 4: Where appropriate, mitigate unnecessary governmental constraints to the maintenance, improvement, and development of housing.			
4.1 Special Needs and Extremely Low-Income Housing	Action 1: Amend the Zoning Ordinance to remove the R-5 Zoning District. Any uses that are currently permitted in the R-5 District may be permitted in an alternative district. Action 2: Ensure that information related to zoning for special needs housing is available at the Permit Center and on the City of Belmont website. Action 3: Work with special needs housing service providers to develop incentives for development of extremely low-income housing such as expedited processing, zoning exceptions that provide certain financial relief, and supporting applications for grant or other funding opportunities. Action 4: The City shall reach out annually to developers of supportive housing to encourage development of project targeted for persons with disabilities, including persons with developmental disabilities.	Action 1: Completed November 2017. Action 2: Ongoing. Permit Center was remodeled to provide an ADA compliance permitting experience; required information on ADA zoning available at permit center. Action 3: Ongoing and completed. Mid-Pen Housing built 22 very low-income units in the Firehouse Square project on City Housing Successor owned property. Hill St/El Camino Real Affordable Housing Project (on City Housing Successor owned property) will provide 22 very-low-income units, and in June 2022 the City authorized application for SB 35 streamlined review. Action 4: Annual, ongoing, and completed; Two pending City-owned Affordable Housing projects must provide a minimum 5% of units to special needs populations, a trend which will continue. Effectiveness: Program has been moderately effective in targeting assistance groups with special needs and extremely low-income households. Appropriateness: Ongoing need for this activity; modifications will strengthen ways to address the housing needs of special needs groups. Quantification: The City has permitted 76 very low-income housing units during the current planning period. Special Needs Analysis: The City has successfully provided land and funding resources to projects that include both very low-income units and units set aside for special needs populations, including households at risk of homelessness. More programming needed during the next planning period to reach other special needs populations.	Update. The Housing Element includes programs targeted towards supporting development of housing for special needs groups (Programs H5.10 and H5.11,).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
4.2 Transfer of Development Rights	Action 1: Continue to allow the transfer of development rights or floor area within the San Juan Area. Action 2: Consider the feasibility of amending the transfer of development rights program to allow development rights to be transferred from the hillside areas to priority development areas.	Action 1: Completed and ongoing. Continued compliance in transfer of rights. Action 2: Ongoing. No specific activity to report. Effectiveness: Program has been moderately effective creating additional opportunities for new development. Appropriateness: With proposed changes to remove the density metric from the zoning code, there is no further need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Remove; this program is no longer needed to facilitate more housing growth in the City's priority development area.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
4.3 Density Bonus Program	Action 1: Implement the Density Bonus Program as follows: ▪ Develop a Density Bonus information website and program materials and/or handouts. ▪ Provide information materials to all potential target site and El Camino Real corridor developers.	Completed and ongoing. The Density Bonus section of the Zoning Ordinance is available on the City Website, City staff have engaged in numerous discussions with housing developers to implement Density Bonus opportunities; the Hill Street/El Camino Real Affordable Housing Project on City-owned property received a density bonus in 2020. Effectiveness: Program has been effective creating additional opportunities for new development. Appropriateness: Ongoing need to provide opportunity to use density bonus, and with proposed modifications it will strengthen opportunities to address the needs of special needs groups. Quantification: Belmont approved five multi-family residential housing projects that took advantage of State and local density bonus provisions in order to achieve higher project densities. The City is reviewing three additional housing projects that include a density bonus component. Special Needs Analysis: Nearly all housing development projects during the previous planning period took advantage of a density bonus in exchange for provision of affordable housing units. A majority of these units were low-income; an updated density bonus program in the next planning period will strengthen opportunities to support lower-income households and special needs group.	The Housing Element includes a program to monitor and analyze the interrelationship between the zoning standards, objective design standards, and State Density Bonus to identify and remove constraints to housing development (Program H4.5).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
4.4 Development Review Process	Action 1: Ensure that the development process complies with State law. This will entail: ▪ Eliminating any time used to determine the level of environmental review for secondary dwelling units, as these are generally CEQA-exempt; ▪ Capping the number of days needed to act on a CEQA-exempt single-family unit permit application to 60 days; and, ▪ Capping the number of days needed to act on a multi-family permit application that requires an EIR to 180 days (90 days if the project requires an EIR and at least 49% of the units are affordable), and 60 days if the project requires a Negative Declaration or is CEQA-exempt. Action 2: Adopt design guidelines for multi-unit and mixed-use development projects.	Action 1: Completed and ongoing. Planners ensure ongoing compliance with all applicable CEQA processing times. Action 2: Completed and ongoing. BVSP and Corridor Mixed Use (CMU) zoning for El Camino Real corridor both adopted in November 2017 and include updated design guidelines that provide clarity in the development review process. Effectiveness: Program has been effective ensuring the City complies with development review requirements. Appropriateness: Ongoing need for this activity; modifications will add new compliance measures pertaining to SB 35, SB 330 and others. Quantification: The City approved its first SB 35 eligible project in February 2023. Special Needs Analysis: No information on special needs is available for this program.	A new program has been included to ensure information and materials related to streamlined development review options (SB 35) are available on the City website and at City Hall, and that staff are prepared to implement streamlined review (Program H4.6).
4.5 Planned Development	Action 1: Continue to allow Planned Development zoning.	Action 1: Completed and ongoing. No specific activity to report. Effectiveness: Program has been effective allowing Planned Development Zoning. Appropriateness: Ongoing need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Ongoing.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
4.6 Parking	Action 1: Consider amending the Zoning Ordinance to reduce parking requirements for multi-family residential and mixed-use projects (for example, reduce the studio unit parking requirement from 2 spaces per unit to 1 space per unit). Action 2: Develop shared parking strategies as part of the Belmont Village Implementation Plan and evaluate the feasibility of establishing parking districts within the Belmont Village area to fund shared parking infrastructure.	Action 1 and 2. Both Completed. The BVSP and the General Plan Phase I Zoning (adopted November 2017) allow for shared parking serving more than one use when certain criteria are met, and reduced parking in exchange for community benefits. Overall parking requirements for mixed use projects were reduced. Effectiveness: Program has been effective in reducing parking requirements as a constraint. Appropriateness: As these actions are complete, there is no longer a need for them. Quantification: All affordable housing projects entitled during the previous planning period allowed reduced parking standards either as part of a density bonus waiver or community benefit zoning incentive. Special Needs Analysis: No information on special needs is available for this program.	Remove, completed.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
4.7 Multi-Family Development	Action 1: When multi-family residential and mixed-use development design guidelines are adopted, amend the Zoning Ordinance to remove the conditional use permit requirement for multi-family development projects in high-density residential or mixed-use zones.	Action 1: The Belmont Village zoning districts and the Corridor Mixed Use zoning district, both adopted in 2017, allow multi-family residential housing development by right (no CUP) when not located on the ground floor. In 2020 the City amended the Zoning Ordinance to remove the CUP requirement for multi-family housing in the R-3 and R-4 zoning districts. Effectiveness: Program has been effective in removing the conditional use permit as a constraint. As detailed in the Housing Constraints section, five multi-family housing development projects were approved with a CUP entitlement without significant financial or development review time impacts. The CUP continues to be a tool for ensuring projects meet ongoing operational and maintenance obligations. Appropriateness: As these actions are complete, there is no longer a need for them. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Remove; completed.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 5: Ensure fair and equal housing opportunity for all persons regardless of race, religion, sex, marital status, family type, ancestry, national origin, color, or other protected status.			
5.1 Fair Housing Program	Action 1: Publicize the Peninsula Conflict-Resolution Center (PCRC) at the permit center. Action 2: Provide program support to PCRC and other fair housing nonprofit organizations, such as Project Sentinel.	Actions 1 and 2: Completed and ongoing. Belmont staff has met with PCRC and Project Sentinel staff and promotes their services to residents when appropriate. Effectiveness: Program has been moderately effective in targeting assistance to groups with special needs and extremely low-income households. Appropriateness: Ongoing need for this activity; modifications will strengthen ways to address the fair housing needs of special needs groups. Quantification: no quantifiable activity to report. Special Needs Analysis: City staff were able to connect Belmont residents with organizations supporting special needs housing.	The Housing Element includes partnering with Project Sentinel to provide fair housing training for landlords and tenants every two years (Program H5.5).
5.2 Housing for the Disabled	Action 1: Continue to offer program support to the Center for Independence of the Disabled (CID) to provide housing accessibility modifications for the disabled in Belmont. Action 2: Post information on the city website regarding housing opportunities for the disabled, including persons with developmental disabilities, and a link to the County's website for additional housing options. Action 3: Provide clear information on the City's website and at the Permit Center related to the City's reasonable accommodation ordinance that provides exceptions in zoning and land-use for housing for persons with disabilities, including persons with developmental disabilities. Action 4: By December 2015, the City shall review the Reasonable Accommodation Ordinance to ensure ongoing compliance with state law.	All Actions: Completed and ongoing. No specific activity to report. Effectiveness: Program has been moderately effective in targeting assistance to groups with special needs and extremely low-income households. Appropriateness: Ongoing need for this activity; modifications will strengthen ways to address the housing needs of special needs groups. Quantification: no quantifiable activity to report. Special Needs Analysis: City staff were able to connect Belmont residents with organizations supporting special needs housing.	Update. The Housing Element includes programs targeted towards supporting development of housing for special needs groups (Programs H5.10 and H5.11,).

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
Goal 6: Promote the conservation of natural resources throughout the Belmont community.			
6.1 Promote Energy Conservation	Action 1: Adopt Conservation Element of the Belmont General Plan 2035. Action 2: Continue to participate in the PG&E Sustainable Solutions Turnkey program and implement the audit identified energy conservation projects. Action 3: Provide program outreach and support, as needed, to Energy Conservation programs such as Peninsula Sunshares, Bay Rea Regional Energy Network (BayREN), and other state or federal programs promoting residential energy conservation. Action 4: Review the zoning ordinance to improve solar access provisions.	Action 1: Completed. Action 2: Completed and ongoing. Action 3: Completed and ongoing. The City participated in Peninsula SunShares, and authorized three additional PACE financing program administrators to operate in Belmont for installing clean energy improvements. Action 4: No specific activity to report. Effectiveness: Program has been effective promoting energy conservation. Appropriateness: Ongoing need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Ongoing. The City continues to implement the Climate Action Plan, and to adopt new reach building codes to promote sustainable construction.
6.2 Support On-Site Alternative Energy Generation	Action 1: Adopt guidelines to encourage on-site solar energy systems. Action 2: Provide informational brochures about solar energy systems and available financial resources at the permit center. Action 3: Consider using City solar farms as demonstration projects for residents to learn more about solar energy. Action 4: Participate in the Peninsula SunShares group photovoltaic buy-in program.	No specific activity to report on any actions. The city adopted a Climate Action Plan in November 2017 and is working on implementation. The City is working to install vehicle battery charging stations on City property. Effectiveness: Program has been effective promoting energy conservation. Appropriateness: Ongoing need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Ongoing. The City standard conditions of approval and General Plan EIR mitigation measures include requirements to promote alternative energy generation when possible.

TABLE D-3. EVALUATION OF 2015-2023 HOUSING ELEMENT PAST PERFORMANCE

Program No./Name	Description and Objective	Timeframe and Achievements	Recommendation
6.3 Promote Water Conservation	Action 1: Adopt guidelines to encourage low-water landscaping. Action 2: Provide informational brochures about drought-resistant and low-water landscaping options that are specific to Belmont's geography and native habitats.	Ongoing, The City actively promotes the Department of Water Resources Model Water Efficient Landscape Ordinance for all development activity. Effectiveness: Program has been effective promoting conservation. Appropriateness: Ongoing need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Ongoing.
6.4 Adequate Water and Sewer Services	Action 1: Deliver the adopted Housing Element to the Mid-Peninsula Water District and Silicon Valley Clean Water within one month of adoption. Action 2: Provide information on the City website about the adopted sewer priority policy for affordable housing projects.	Action 1: Completed (adopted June 2015). Action 2: Completed; Sewer Priority Policy available on the City Website. Effectiveness: Program has been effective in communicating information. Appropriateness: Ongoing need for this activity. Quantification: no quantifiable activity to report. Special Needs Analysis: No information on special needs is available for this program.	Ongoing. The Belmont Housing Element will be delivered to all agencies impacted by housing growth, including the water district.
6.5 Update the General Plan	Action 1: Update the City of Belmont General Plan to integrate land use and transportation planning.	Completed (adopted November 2017). Effectiveness: Program has been effective in updating the General Plan. Appropriateness: As these actions are complete, there is no longer a need for them. Quantification: no quantifiable activity to report. Special Needs Analysis: Considerations and accommodations for special needs populations are included in the Goals and Policies in the General Plan.	Remove; completed.

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APPENDIX E: OUTREACH

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1. Community Outreach Summary

The Housing Element is an important document that will shape the future of our community. Therefore, it is important that it reflects the vision of the people who make the City of Belmont special. To accomplish this, Belmont developed and implemented an outreach plan designed to reach as many community members who live and work here as possible. For some of the community outreach activities, Belmont partnered with other San Mateo County jurisdictions for a first-of-its-kind Countywide outreach effort through an award-winning collaboration called 21 Elements. A summary of public participation and community outreach activities and key takeaways are included below.

1.1 Website and Social Media Summary

- Belmont developed a City webpage at www.belmont.gov/housingelement to host all information and resources related to the Housing Element update. The webpage hosted an archive of past Belmont Housing Elements, recordings and other materials from community engagement activities, and multiple ways for people to provide feedback, including a virtual sites map. The City website's homepage also included a banner linking visitors to the Housing Element webpage.
- Belmont participated in and helped shape the "Let's Talk Housing" regional housing collaboration. Let's Talk Housing developed a Countywide website available in five languages, a Belmont webpage (www.letstalkhousing.org/belmont) detailing the City's timeline, engagement activities, and resources that also linked to the Belmont website, videos about the process in several languages, and a social media presence. As of February 2022, the website has been visited more than 17,000 times, with more than 20% from mobile devices.
- Belmont created a dedicated e-notification list to keep interested parties informed about the Housing Element update process.
- Belmont utilized a variety of social media platforms to inform the community about the Housing Element update process and to solicit community survey responses.

1.2 Community Meetings

Belmont participated in several housing meetings and webinars in partnership with 21 Elements, including the following.

- **Introduction to the Housing Element** – A housing element overview with breakout discussion rooms that was part of a series of introductory meetings attended by more than 1,000 community members countywide.

- **All About RHNA** – A webinar offering a deep dive into the RHNA allocation process and the opportunity sites methodology.
- **Stakeholder Listening Sessions** – Four meetings where staff from all County jurisdictions could listen to and hold breakout discussions with housing stakeholder groups arranged by topic. More than 30 groups participated.
- **Creating an Affordable Future** – A four-part webinar series to help educate community members about local housing issues.

In addition, the City of Belmont coordinated and hosted several public meetings to review components of the Housing Element update. All the following meetings' recordings and materials can be found on the City's Housing Element webpage.

- **Affirmatively Furthering Fair Housing Workshop (March 23, 2022)** – A virtual community meeting to review AFFH and new Housing Element requirements.
- **Housing Element Community Workshop (June 27, 2022)** – A highly-attended virtual meeting to review the Housing Element update and the connection between housing growth and transportation, parks, and other land use planning efforts within the city.

1.3 OTHER OUTREACH STRATEGIES

- **Community Postcard Mailer #1** – Direct postcard mailer in March 2022 to all residential units in Belmont introducing the Housing Element update, promoting the online AFFH survey, and promoting the March AFFH Community Workshop. The postcard was also distributed at the Belmont Library and Twin Pines Senior and Community Center; invitation for comments in Spanish included.
- **AFFH Fair Housing Online Survey** – To gather insight on community needs and priorities. Survey link provided in direct postcard mailer to all residential units in Belmont and shared on social media (Facebook, NextDoor, Instagram, and Twitter), the City website, the Citywide Weekly Update community email, and citywide utility bill insert mailer. The survey was made available in English, Spanish, simplified Chinese, Tagalog, and Vietnamese, receiving 174 survey responses.
- **Community Postcard Mailer #2** – Direct postcard mailer to all residential units advertising where to find the draft Housing Element and Environmental Impact Review (EIR) and promoting the June community housing workshop. The postcard was also distributed at the Belmont Library and Twin Pines Senior and Community Center; invitation for comments in Spanish included.
- **Citywide Utility Bill Inserts** – The City designed and distributed an informational flyer with the quarterly municipal sewer utility bill that included information about the Housing Element Update, a short URL link to the AFFH Fair Housing Survey, the Housing Element web address, and a housing email address for people to provide comments.

- **Equity Advisory Group** – Belmont supported an Equity Advisory Group with 21 Elements to ensure outreach was structured to meet with stakeholders where they were at as much as possible.

It is more important than ever to include as many voices as possible in the Housing Element. Housing Elements, at their best, provide an opportunity for everyone to add their voice to the conversation. However, too often, many people are left out of the process. Renters, workers, young families, youth, people of color, immigrants, refugees, non-English speakers, and people with disabilities are often unable to participate in outreach activities when scheduled, don't know how to get involved, or don't trust the process. Our goal was to change that. Specifically, we did the following.

- Ensured opportunities were available to receive information and provide feedback in multiple languages, offering direct foreign language translation services by request.
- Designed a website that was mobile friendly, with accessibility features and in multiple languages (lower-income residents, young adults, and people of color are more likely to use their phones).
- Participated in an Equity Advisory Group consisting of 18 organizations across San Mateo County that provided feedback on outreach and materials, and shared information about the Housing Element update and how to participate in the process with the communities they serve.
- Launched an Affirmatively Furthering Fair Housing Survey that received 174 responses.

1.4 KEY TAKEAWAYS

Below is a summary of key takeaways that emerged throughout the outreach process.

- **Housing is personal.** People often have differing views on housing because it is a very personal issue tied to feelings of safety, belonging, and identify. Often, comments reflected people's current housing situation. Those with safe, stable housing that they can afford were more concerned with potential change. Those without were generally more interested in bolder policies and more housing. Throughout the outreach process, many people shared meaningful stories of being priced out of their communities or of their children not being able to live in the community where they grew up.
- **The price of housing is a major concern.** Through survey responses and people who spoke during community meetings, many Belmont residents voiced concerns about the high cost of renting or buying a home today, either for themselves, friends, or family. It is an issue that touches many lives.
- **More housing is needed.** Generally, participants agreed that Belmont needs more housing, particularly affordable housing. However, there were diverging views on how to accomplish this, where housing should go, and what it should look like.

- **Single-family neighborhoods are polarizing.** While some people voiced their interest in up-zoning sites near single-family neighborhoods, most Belmont homeowners wanted to protect single-family neighborhoods and the property investments they had made.
- **Affordable housing is a top concern.** Many felt that more needed to be done to promote affordable housing. They also felt developers should be eligible for incentives and opportunities that make them more competitive.
- **Better information resources**. People wanted to know how to find affordable housing in their communities and navigate the process of applying for it.
- **Issues are connected**. Transportation, infrastructure like storm and sewer facilities, adequate park and recreational space, climate change, and access to living wage jobs and education opportunities are all tied to housing and quality of life. These issues are not siloed in people's lives and there is a desire to address them in interconnected ways. The June 2022 community workshop included Belmont staff from Housing, Planning, Public Works, and Parks and Recreation to provide comprehensive information about housing growth in Belmont.
- **Regional input matters, but there's more to figure out.** Building a broader sense of community and sharing resources at the countywide level was valuable. However, it was more important to this process to engage non-resident community members on jurisdiction-specific input. The City will continue to utilize some of the Housing Element engagement strategies for future community engagement efforts to insure inclusion in outreach.
- **Diversity in participation was a challenge.** Despite partnering with organizations to engage with the hardest to reach communities and providing multilingual outreach, achieving diversity in participation was challenging. In the wake of the COVID-19 pandemic, organizations already operating on limited resources were focused on supporting more immediate needs, while the added stresses of life coupled with the digital divide added additional barriers for many.

1.5 WHAT WE ACCOMPLISHED

Belmont developed a diverse outreach plan to hear from as many community members as possible. The following provides a more detailed summary of Belmont's community engagement activities related to the RHNA 6 Housing Element update process.

WEBSITE AND SOCIAL MEDIA

As a starting point for accomplishing extensive outreach, Belmont developed a clear online presence with all the information needed to understand the update process and know how to participate.

- **Belmont webpage and social media communications.** Belmont has invested significant resources and staffing in the last few years to modernize our digital communication

strategies and better reach community stakeholders. Specifically for the Housing Element update, Belmont developed a City webpage (www.belmont.gov/housingelement) to host all information and resources related to the Housing Element update. The webpage hosted an archive of past Belmont Housing Elements, recordings and materials from all community engagement activities, and multiple ways for people to provide feedback, including a virtual housing opportunity sites map. The City's main homepage also included a banner directly linking visitors to the Housing Element webpage. The webpage was mobile-friendly, with accessibility features. As part of this communications redesign, Belmont also utilized a variety of social media platforms, in addition to more traditional email newsletters, to put out information related to the Housing Element update. All community engagement activities, including meetings, workshops, and online surveys were heavily advertised on all social media channels (NextDoor being the most heavily used, plus Facebook, Twitter, Instagram, and LinkedIn). The Citywide Weekly Update community email, issued every Friday, reaches many community members and regularly featured information on the Housing Element update process. During the public comment period in particular, the City sent out regular digital communications and reminders to the community.

- **Let's Talk Housing website.** To reach a broader audience and supplement Belmont's Housing Element webpage, the City joined the 21 Elements group in launching the "Let's Talk Housing" website in March 2021. Our goal was to clearly explain what a Housing Element is, why it matters, and how to get involved. It was made available in Arabic, Chinese, English, Spanish, and Tagalog, designed to be responsive on all types of devices, and including accessibility features. As part of this effort, a Belmont-specific information page was created with our proposed timeline, information on engagement activities, and resources that were also linked to the City website. As of January 2022, the website has been viewed more than 17,000 times, with more than 20% occurring from mobile devices. "Let's Talk Housing" Facebook, Instagram, Twitter, and YouTube accounts were also created and maintained to keep people informed about upcoming or past events.
- **Informational videos on the Housing Element update.** After completing a series of introductory meetings on the Housing Element Update (see below), Belmont supported 21 Elements in developing shorter, four-minute snippets to ensure information was more accessible and less onerous than watching an hour-long meeting. Two videos were produced in Arabic, Chinese, English, Spanish, and Tagalog: "What is a Housing Element and How it Works" and "Countywide Trends and Why Housing Elements Matter." The videos were made available on the Let's Talk Housing YouTube channel and website, as well as shared on social media. Belmont also pushed these information videos out on all our local communication channels.

1.6 PUBLIC MEETINGS AND HEARINGS

Belmont held and participated in a variety of virtual meetings, primarily virtual, to inform the public about the Housing Element and hear what matters most to the community. While in-person meeting space was available for some of the more recent Housing Element study

sessions, Belmont found that most community members enjoyed the flexibility of participating virtually. Meetings were designed to keep Belmont officials and community members aware of the process timeline, provide input on the different steps and draft information as it became available, and engage in discussion with City staff to share concerns, questions, or support for housing policies.

INTRODUCTORY MEETING TO THE HOUSING ELEMENT UPDATE

Belmont participated in a collaborative virtual countywide meeting about the Housing Element update. Held on April 8, 2021, the meeting provided community members with an introduction to the Housing Element update, why it matters, information on the Let's Talk Housing outreach effort, and countywide trends. Belmont staff facilitated a breakout room discussion with community members on housing needs, concerns, and opportunities and answered any questions. A poll was given during the meeting to identify who was joining and, more importantly, who was missing from the conversation. This included collecting information on whether they rented or owned, who they lived with, and their age and ethnicity. Time for questions was allotted throughout, and after the meeting, a meeting survey was provided to all participants, along with all discussed resources and links. Thirty-five people registered for the meeting, six of whom lived in Belmont. Of the participants, five said that they had lived in the City for over 21 years, and all of the residents owned their own homes. Of the participants, five identified as White and one as Asian, and the majority (66%) were between the ages of 50 and 69.

In total, 1,024 people registered for the meeting series, and 264 registered for the All About RHNA meeting. Of those who registered for the series, the majority identified as White (66%) or Asian (15%) and were 50 years or older; nearly half were 50 to 69 years old, and almost a fifth were over 70. Almost half had lived over 21 years in their homes, and three-fourths owned their own homes.

ALL ABOUT RHNA WEBINAR

Belmont helped promote the "All About RHNA" webinar hosted by 21 Elements in April 2021 to provide information and answer community questions about the RHNA process; 264 people registered and 80 questions were answered over three hours. The recording of this meeting and the FAQ can be found at https://www.letstalkhousing.org/past-events.

STAKEHOLDER LISTENING SESSION SERIES

Belmont joined 21 Elements for a facilitated series of four listening sessions held between September and November 2021 to hear from various stakeholders who operate countywide or across multiple jurisdictions. The sessions convened over 30 groups, including fair housing organizations, housing advocates, builders/developers (affordable and market rate), and service providers to provide observations on housing needs and input for policy consideration. Summaries of each session can be found at http://www.21elements.com/community-engagement.

Key themes and stakeholder groups included the following.

- **Fair Housing** – Concern for the end of the eviction moratorium, the importance of transit-oriented affordable housing and anti-displacement policies, and the need for education around accessibility regulations and tenant protections. The following eight stakeholder groups provided this feedback.
  - Center for Independence www.cidsanmateo.org
  - Community Legal Services of East Palo Alto (CLSEPA) www.clsepa.org
  - Housing Equality Law Project www.housingequality.org
  - Legal Aid for San Mateo County www.legalaidsmc.org
  - Project Sentinel www.housing.org
  - Housing Choices www.housingchoices.org
  - Public Interest Law Project www.pilpca.org
  - Root Policy Research www.rootpolicy.com
- **Housing Advocates** – Concern for rent increases and the need for ongoing outreach to underserved and diverse communities, workforce housing, deeply affordable and dense infill, and tenant protections for the most vulnerable. The following six stakeholder groups provided this feedback.
  - Housing Leadership Council www.hlcsmc.org
  - Faith in Action www.faithinactionba.org
  - Greenbelt Alliance www.greenbelt.org
  - San Mateo County Central Labor Council www.sanmateolaborcouncil.org
  - Peninsula for Everyone www.peninsulaforeveryone.org
  - San Mateo County Association of Realtors www.samcar.org
- **Builders and Developers** – Local funding; tax credit availability; and concern that appropriate sites limit affordable housing while sites, construction costs, and city processes limit market rate housing. The following 12 stakeholder groups provided this feedback.
  - Affirmed Housing (Affordable) www.affirmedhousing.com
  - BRIDGE Housing (Affordable) www.bridgehousing.com
  - The Core Companies (Affordable, Market Rate) www.thecorecompanies.com
  - Eden Housing (Affordable) www.edenhousing.org
  - Greystar (Market Rate) www.greystar.com
  - Habitat for Humanity (Affordable) www.habitatsf.org
  - HIP Housing (Affordable) www.hiphousing.org
  - Mercy Housing (Affordable) www.mercyhousing.org
  - MidPen Housing (Affordable) www.midpen-housing.org
  - Sand Hill Property Company (Affordable, Market Rate) www.shpco.com
  - Sares | Regis (Market Rate) www.srgnc.com
  - Summerhill Apartment Communities (Market Rate) www.shapartments.com
- **Service Providers** – More affordable housing and vouchers or subsidies for market rate housing are needed, along with on-site services and housing near transit, and jurisdictions

should work with providers and people experiencing issues before creating programs. The following ten stakeholder groups provided this feedback.

- Abode Services www.adobeservices.org
- Daly City Partnership www.dcpartnership.org
- El Concilio www.el-concillio.com
- HIP Housing www.hiphousing.org
- LifeMoves www.lifemoves.org
- Mental Health Association of San Mateo County www.mhasmc.org
- National Alliance on Mental Illness www.namisanmateo.org
- Ombudsman of San Mateo County www.ossmc.org
- Samaritan House San Mateo www.samaritanhousesanmateo.org
- Youth Leadership Institute www.yil.org

CREATING AN AFFORDABLE FUTURE WEBINAR SERIES

Belmont and 21 Elements offered a four-part countywide webinar series in fall of 2021 to help educate community members about local housing issues. The sessions were advertised and offered in Cantonese, Mandarin, and Spanish, though participation in non-English channels was limited. All meetings and materials can be found at https://www.letstalkhousing.org/past-events.

The following topics, and how each intersects with regional housing challenges and opportunities, were explored.

- **Why Affordability Matters** – Why housing affordability matters to public health, community fabric and to county residents, families, workers, and employers
- **Housing and Racial Equity** – Why and how our communities have become segregated by race, why it is a problem, and how it has become embedded in our policies and systems
- **Housing in a Climate of Change** – What is the connection between housing policy and climate change and a walk through the Housing and Climate Readiness Toolkit
- **Putting it All Together for a Better Future** – How design and planning for much-needed new infill housing can be an opportunity to address existing challenges in our communities

The series included speaker presentations, audience questions and answers, breakout sessions for connection, and debrief discussions. Participants were eager to discuss and learn more about housing challenges in their community. They asked questions, commented in the chat, and shared feedback in a post-event survey. Overall, comments were positive and in favor of more housing, though some were focused on the need for new affordable housing. There was a lot of interest in seeing more housing built (especially housing that is affordable), concern about change or impacts to schools, parking, and quality of life, and personal struggles with finding housing that is affordable and accessible. Some participants wanted more in-depth education and discussion of next steps, while others had more basic questions.

In total, 754 registered for the series. Of those who shared, the majority identified as White (55%) or Asian (24%) and ranged between 30 and 70 years old. Over half have lived in the county for over 21 years and nearly two-thirds owned their homes. For more information, see the Summary at http://www.21elements.com/community-engagement.

CITY OF BELMONT PUBLIC MEETINGS

- **City Council Public Study Session (May 11, 2021)** – The purpose of this meeting was to introduce the draft RHNA allocation process and numbers, show the City Council and community members the proposed update timeline, and talk about some of the new topics that would be included in the updated Housing Element.
- **City Council Public Meeting (January 11, 2022)** – This was another virtual check-in with the City Council and community on progress made towards the Housing Element update, with an emphasis on work completed in preparing an Environmental Impact Report.
- **Affirmatively Furthering Fair Housing Workshop (March 23, 2022)** – This was a virtual community meeting to review Affirmatively Further Fair Housing (AFFH) and new Housing Element requirements. This workshop was promoted heavily on the City's social media channels and all housing units in the City of Belmont received a direct postcard mailing with information in English, Spanish, and Chinese promoting the workshop and inviting people to take the online AFFH survey. The offer for translation services was made but no requests were received.
- **City Council Public Study Session (April 26, 2022)** – This presentation focused on reviewing draft Housing Sites, AFFH assessment, and draft Housing Element programs. This meeting was the first deep dive into the Housing Element documents and data, and the study session format allowed the Council to ask many questions about new topics like AFFH.
- **Planning Commission Public Study Session (May 17, 2022)** – This presentation also focused on reviewing draft housing sites, AFFH assessment, and draft Housing Element programs. This highly-attended meeting was an opportunity for both the Planning Commission and the Belmont community to dive into some of the important components of the Housing Element update. A lot of community feedback centered on the draft housing opportunity sites and concerns about locating a majority of the proposed housing sites along the El Camino Real and Old County Road corridors.
- **Housing Element Community Workshop (June 27, 2022)** – As a follow up to the Planning Commission meeting held in May, the City held a community workshop to discuss the RHNA allocation process, the housing sites methodology, and some of the land use changes proposed for the next Housing Element cycle. This meeting was attended by 71 people, and was hosted by City staff from Housing, Finance, Public Works, Parks and Recreation, and Planning Departments. Staff's presentation aimed to show how housing and population growth are guiding principles in the work done by all City departments. Specific feedback on housing opportunity sites included a desire to limit building heights, provide more parking, and address traffic impacts.

- **Planning Commission Draft Housing Element and EIR Review (July 19, 2022)** – This was a well-attended meeting for Planning Commission consideration of the full draft Housing Element and draft Environmental Impact Report (EIR). The meeting was available to attend both in-person and virtually and the Commission heard over 45 public speakers, ultimately making a series of recommendations to the City Council for modifications to the rezoning programs and Sites Inventory.
- **City Council Draft Housing Element and EIR Review (July 26, 2022)** – This was another well-attended public meeting that lasted over 4 hours, with more than 45 in-person and virtual speakers. Ultimately, the Council concurred with the Planning Commission recommendations to modify the proposed zoning amendments and remove sites from the Housing Sites Inventory.
- **Planning Commission Housing Element and EIR Review (January 17, 2023)** – At this meeting, the Planning Commission reviewed the revised draft of the Housing Element and final EIR and recommended that the City Council adopt the Housing Element and certify the EIR.
- **City Council Public Meeting Certifying the Final Programmatic EIR and Adopting the 2023-2031 Housing Element (January 30, 2023)** – At this meeting the City Council adopted the Housing Element and certified the EIR.
- **City Council Public Study Session (September 26, 2023)** – This presentation focused on reviewing additional policies related to AFFH and provide an update on the revisions made in response to the April 2023 HCD comment letter.
- **City Council Public Study Session (March 26, 2024)** – This presentation focused on new Housing Mobility programs in response to HCD comments that will support more housing opportunities across the city, specifically targeting low–density neighborhoods in response to the December 2023 HCD comment letter.

1.7 OTHER COMMUNITY OUTREACH STRATEGIES

Belmont set out to collect as much feedback as possible from the community, and to ensure we were reaching as many people as possible and doing so thoughtfully. Acknowledging that virtual engagement was not always accessible for all community members, the City has tried to reach all Belmont residents by sending information directly to them.

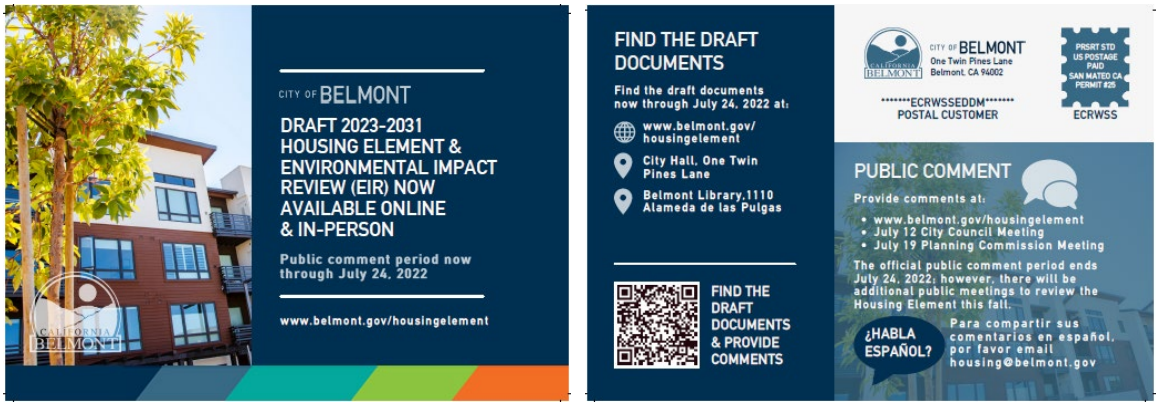
- **Two Direct Mailer Postcards** – Belmont sent two Housing Element update postcard mailers to every residential unit in the City of Belmont. To generate this mailing list, the City reached out to residential facilities where individual housing/residential units don't typically show up on a community mailing list. This included two special needs group homes and two senior assisted living facilities. The City also made the mailers available at the Twin Pines Senior and Community Center grab-and-go lunch program, and at City Hall. The postcards included verbiage in English, Spanish, and Chinese, informing residents about upcoming community workshops, with a QR code and web addresses inviting them to provide feedback to the City via online surveys, email, or directly contacting City staff.

The City has received positive feedback from residents who received the postcards and were able to participate in engagement activities.

Community Mailer Postcard #1 (front and back)



Community Mailer Postcard #2 (front and back)



- **Affirmatively Furthering Fair Housing Survey** – As is summarized in the AFFH Appendix, 21 Elements conducted a countywide survey of San Mateo County residents to support the AFFH analysis of Housing Elements. Survey questions explored residents perceptions of housing, affordability, and neighborhood challenges, as well as experiences with displacement and housing discrimination. It also asked about residents' access to economic opportunity, captured through their reported challenges with transportation, employment, and K-12 education. The survey included questions about residents' current housing situation, housing, neighborhood and affordability challenges, healthy neighborhood indicators, access to opportunity, and experience with displacement and housing discrimination. The survey was available online, in both Spanish and English, in a format accessible to screen readers, and promoted through jurisdictional communications and social media as well as partner networks. Out of the 2,382 respondents, 89 were Belmont residents.

- **Equity Advisory Group** – In alignment with community outreach best practices, it was important to include the guidance of and foster partnerships with community organizations to help ensure everyone's voices were heard during the Housing Element update. In response, an Equity Advisory Group (EAG) was formed, consisting of 15 organizations or leaders countywide that are advancing equity and affordable housing. A stipend of $1,500 was originally provided for meeting four to five times over 12 months to advise on Housing Element outreach and help get the word out to the communities they work with. After meeting twice in 2021, it was decided the best use of the EAG moving forward was to provide more focused support in 2022 based on jurisdictional needs and organizational expertise. To-date, EAG members have facilitated and hosted community meetings in partnership with 21 Elements, collected community housing stories to put a face to housing needs, advised on messaging, and amplified events and activities to their communities. The EAG continue to work collaboratively with jurisdictions and deepen partnerships, as well as connect community members to the Housing Element update process. All participating organizations are featured on the Let's Talk Housing website, and include the following.
  - Ayudando Lations A Soñar (ALAS) www.alashmb.org
  - Community Legal Services www.clsepa.org
  - El Comite de Vecinos del Lado Oeste (El Comite) www.tenantstogether.org/resources/el-comité-de-vecinos-del-lado-oeste-east-palo-alto
  - EPACANDO www.epacando.org
  - Faith in Action www.faithinaction.org/federation/faith-in-action-bay-area/
  - Housing Choices www.housingchoices.org
  - Housing Leadership Council www.hlcsmc.org
  - Menlo Together www.menlotogether.org
  - Nuestra Casa www.nuestracasa.org
  - One San Mateo www.onesanmateo.org
  - Peninsula for Everyone www.peninsulaforeveryone.org
  - Puente de la Costa Sur www.mypuente.org
  - San Mateo County Health www.gethealthysmc.org
  - Youth Leadership Institute www.yli.org/region/san-mateo
  - Youth United for Community Action www.youthunited.net
- **Interactive Housing Sites Inventory Map** – In July 2021, as part of the California Environmental Quality Act (CEQA) Environmental Impact Report scoping process, the City created an interactive map of the draft Housing Sites Inventory. The map enabled viewers to scroll around the City and select specific parcels to get additional information such a land use, zoning, and property size. During the required public comment period, map viewers were able to use the mapping tool to provide specific comments or feedback directly onto any of the draft housing opportunity sites. This interactive tool was successful at enabling the City to obtain site-specific comments and feedback on the draft Housing Sites Inventory, but to also provided a platform for residents to share their concerns about a significant growth in housing development in Belmont. Neighbors expressed concerns

related to increased traffic and parking problems, increased building heights, and access to park and recreation facilities as well as impacts on local schools. The City used this feedback to host a community listening session in June 2022 that was hosting by City staff from several departments to share what other infrastructure projects are planned to help accommodate citywide housing growth. The following word cloud diagram was generated using comments received on the interactive map.



1.8 SPECIAL NEEDS COMMUNITY OUTREACH EFFORTS

During the Housing Element development process, Belmont made diligent efforts to engage all economic segments of the Belmont community, including special needs populations. These efforts are detailed above and summarized below.

- **Belmont Senior Residents** – One of the largest special needs housing populations in Belmont are seniors. With an aging senior population, several senior living facilities are located in Belmont and a robust senior and community center is located near Belmont City Hall. During the Housing Element development process, the City made sure that both the Fair Housing community mailer and the public notice mailer were delivered to all residential tenants in Belmont; the City reached out to senior living facilities to ensure distribution of materials to residents who might not otherwise be on community or property owner mailing lists. The City also made sure to provide printed materials at the Twin Pines Senior and Community Center grab-and-go lunches, which were extremely well-attended during the COVID-19 pandemic closure of other traditional community gathering spaces.
- **Translation Services** – To ensure non-English speaking residents had opportunities to participate in the community engagement process, the City made sure to include both Spanish and simplified Chinese translation on printed and digital communications that invited residents to provide input on the Housing Element development process in their language of preference (see example below). Written translation services were provided by ABAG. The City of Belmont Housing Element webpage continues to include verbiage in Spanish offering residents to provide written feedback in their language of preference.

English	Chinese Simplified
If you are unable to attend the community meeting, or would prefer to provide feedback in Simplified Chinese, please complete this brief survey	如果您不能参加社区会议，或希望用简体中文提供反馈意见，请完成此简短调查。

Example of Printed Material Translation

- **Resident Housing Surveys** – The City participated in the ABAG Regional Housing Technical Assistance (RHTA) online housing survey, which was made available in English, Spanish, Tagalog, Vietnamese, and simplified Chinese. Belmont also participated in a countywide fair housing survey, which was available online, in both Spanish and English, in a format accessible to screen readers, and promoted through City communications and social media as well as through partner networks. Out of the 2,382 respondents, 89 were Belmont residents.
- **Equity Advisory Group** – Belmont participated in an EAG with 21 Elements to ensure outreach was designed to meet with community stakeholders where they were at as much as possible. The EAG consisting of 18 organizations across San Mateo County that provided feedback on outreach and materials and shared information about the Housing Element update and how to participate in the process with the communities they serve. In addition, Belmont has provided direct Housing Element updates, meeting invitations, and other related Housing Element development materials to various housing service providers who have been engaged with the City during the two-year process. See above for more details on the EAG effort and community participants.
- **Accessible City Housing Element Website** – The City created a Housing Element update website that was mobile friendly, with accessibility features and in multiple languages, recognizing that lower-income residents, young adults, and people of color are more likely to use their phones to access information about the Housing Element process.

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Nisha Patel, Public Works Dept., (650) 595-7459, npatel@belmont.gov Alberto Espinoza, Public Works Dept., (650) 595-7465, aespinoza@belmont.gov
Agenda Title:	Review Solid Waste Rate Application and Revise Maximum Rates for Collection Services for 2025
Agenda Action:	Resolution

Recommendation

Adopt a resolution stating the City of Belmont's intent to revise the maximum rates that may be charged for solid waste, recyclable materials, and organic materials collection services effective January 1, 2025, and set a Public Hearing date for November 12, 2024.

Strategic Focus Area

Fiscal and Organizational Sustainability

Background

On August 28, 2018, the Council authorized the City Manager to finalize and execute an Amended and Restated Franchise Agreement (Agreement) with Recology of San Mateo County (Recology) for recyclable materials, organic materials, and solid waste collection from January 1, 2021 to December 31, 2035. The Agreement provides for an annual review of the maximum rates that Recology may charge Belmont residential and commercial customers for regular and unscheduled services. Each year, Recology proposes, City staff analyzes, and the City Council adopts solid waste rates that do not exceed Recology's maximum rates.

On July 31, 2024, Recology provided the City their 2025 rate application and detailed worksheet outlining their calculation of the maximum rates. In August, as part of the City's review process, the City retained the services of HDR, Inc. (HDR) to confirm that the rates proposed by Recology were calculated in accordance with the Agreement and associated amendments. HDR and City staff have reviewed and confirmed that the rate adjustment application and the accompanying maximum rate schedules submitted by Recology seeking an 2.04% increase in 2025 over 2024 rates meets the terms of the Agreement.

This report is the first step in the City's process to approve the maximum rates that may be charged for solid waste, recyclable materials, and organic materials collection services. In November, the City will hold a public hearing following the procedures of Proposition 218 to adopt the calendar year 2025 solid waste rates.

Analysis

Recology is proposing total contractor compensation of $9,938,659 for 2025. The percentage change between the 2025 total target revenue of $9,938,659 and the 2024 target revenue of 9,740,247 results in the adjustment multiplier rate of 2.04%, which is consistent with methodology of the Agreement. The adjustment multiplier rate of 2.04% is the proposed 2025 rate increase to the residential and commercial carts and bins and it accounts for CPI cost increases such as labor costs, fuel, general expenses, SB 1383 program implementation, depreciation, interests, incentives and disincentives, direct costs components, and agency payments.

RethinkWaste, also known as the South Bayside Waste Management Authority (SBWMA), is a joint powers authority formed by eleven local government jurisdictions (City of Belmont, City of Burlingame, City of East Palo Alto, City of Foster City, Town of Hillsborough, City of Menlo Park, City of Redwood City, City of San Carlos, City of San Mateo, the County of San Mateo and the West Bay Sanitary District) in San Mateo County, California. RethinkWaste owns and manages the Shoreway Environmental Center in San Carlos which receives all the recyclables, green waste and garbage collected from the Member Agencies.

Table 1 is a summary of the changes in total target revenue from 2024 to 2025.

Table 1
Summary of Changes in Total Target Revenue from 2024 to 2025

Cost Component	2024 Target Revenue	2025 Target Revenue	$ Difference	% Difference
Base Contractor Compensation				
Direct Labor Related	$2,382,648	$2,455,457	$72,808	3.06%
Direct Fuel Costs	287,249	322,119	34,870	12.14%
General Expense Direct & Indirect	1,393,783	1,446,287	52,503	3.77%
Depreciation	281,317	281,317	0	0.00%
Profit	456,105	472,919	16,815	3.69%
Interest	73,679	73,679	0	0.00%
Total Base Compensation	**$4,874,782**	**$5,051,777**	**$176,996**	**3.63%**
Performance (Inc.) / Dis.	(6,147)	(4,487)	**1,660**	-27.01%
Total Pass Thru Costs				
Disposal Projected Cost (i)	$2,241,715	$2,434,527	$192,812	8.60%
Disposal Actual Prior Year Cost (ii)	1,843,054	2,114,505	271,451	14.73%
Disposal Prior Projected Cost (iii)	(1,745,620)	(2,241,715)	(496,095)	28.42%
Agency Payments	2,532,464	2,584,050	51,587	2.04%
Total Pass Thru Costs	**$4,871,613**	**$4,891,367**	**$19,755**	**0.41%**
Total Target Revenue	**$9,740,247**	**$9,938,658**	**$198,410**	**2.04%**

Table 2 shows the present monthly rates, the proposed monthly rates with the 2.04% rate increase, and the monthly change (for illustrative purposes) for residential customers.

Table 2
Summary of the Present, Proposed, and Monthly Change

Schedule	Schedule Description	Present Monthly Rate	Proposed 2025 Rates	$/Month Change
R20G	Residential Waste - 20 Gallons	$40.21	$41.03	$0.82
R32G	Residential Waste - 32 Gallons	47.97	48.95	0.98
R64G	Residential Waste - 64 Gallons	94.43	96.36	1.93
R96G	Residential Waste - 96 Gallons	141.65	144.54	2.89

Commercial customers have similar service to residential customers, but they have the option to adjust the number of pickups per week. In 2025, it is estimated that the commercial rates (Schedule L) will increase by 2.04% for all cart sizes. Table 3 is a summary of the calculated maximum commercial solid waste rates by cart size. Some minor rounding of the rates may occur for purposes of ease of administration.

Table 3
Summary of Calculated Maximum Commercial Solid Waste

COMMERCIAL CARTS

		Cart Size (in Gallons)			
		20	32	64	96
# of Pickups Per Week	1	$52.35	$58.12	$112.40	$162.46
	2	107.69	119.66	226.80	332.78
	3	160.34	178.12	344.13	505.02
	4	220.12	244.57	462.71	683.13
	5	278.50	309.42	588.16	863.66
	6	348.47	387.17	716.74	1,087.16
	7	424.49	471.64	839.05	1,268.34

COMMERCIAL CARTS ORGANICS				
		Cart Size (in Gallons)		
		32	64	96
# of Pickups Per Week	1	$40.71	$78.70	$113.72
	2	83.76	158.76	232.94
	3	124.68	240.88	353.51
	4	171.22	323.92	478.18
	5	216.60	411.72	604.56
	6	271.05	501.68	761.00
	7	330.17	587.33	887.84

Some commercial customers have larger bins which range in size from 1 yard to 6 yards. Commercial waste customers also have the option of different levels of service and can select the number of pick-ups per week. Table 4 is a summary of the calculated maximum commercial solid waste rates for 2025 for the larger bin sizes. It is estimated that the rates (Schedule L) will increase by 2.04% for all bin sizes.

Table 4
Summary of Calculated Maximum Commercial Solid Waste

COMMERCIAL BINS						
		Bin Size (in Cubic Yards)				
		1	2	3	4	6
# of Pickups Per Week	1	$272.61	$548.36	$827.02	$1,128.96	$1,736.26
	2	555.02	1,105.73	1,664.02	2,277.43	3,521.40
	3	842.26	1,668.35	2,505.93	3,425.93	5,293.26
	4	1,132.86	2,235.07	3,350.35	4,587.49	7,050.05
	5	1,425.79	2,809.80	4,197.69	5,753.95	8,831.87
	6	1,779.46	3,317.14	5,095.81	6,968.80	10,676.95
	7	2,099.54	3,928.58	6,000.20	8,209.08	12,505.21

COMMERCIAL BINS ORGANICS

# of Pickups Per Week	Bin Size (in Cubic Yards) 1	2	3	4	6
1	$190.84	$383.86	$578.90	$790.28	$1,215.39
2	388.50	773.99	1,164.85	1,594.20	2,464.99
3	589.57	1,167.86	1,754.16	2,398.14	3,705.27
4	793.00	1,564.54	2,345.25	3,211.25	4,935.04
5	998.06	1,966.83	2,938.37	4,027.75	6,182.32
6	1,245.63	2,321.99	3,567.07	4,878.21	7,473.85
7	1,469.69	2,750.01	4,200.14	5,746.36	8,753.64

GARBAGE COMPACTORS

Commercial Waste 3 Yard Compactor	$1,985.89
Solid Waste Compactor Rate Per Yard	$152.78

The monthly fee above includes the following:
Recycling container at customer's requested size

Additional Services

Recology also provides several services that are not considered regularly scheduled services. Those miscellaneous charges are itemized in Exhibit A, Attachment Q of the attached Resolution. In summary, an overall rate increases of 3.77% is being proposed.

Proposition 218

The City is committed to promoting public participation in City activities. Towards this end, it has been the City's practice to notice and conduct protest hearing proceedings with respect to solid waste maximum rates in the manner set forth in Article XIII D, Section 6(a) of the California Constitution and Section 53755 of the Government Code. That process requires that a notice be mailed to solid waste customers not less than forty-five days prior to any public hearing affecting any rate.

Customers and property owners have the right to submit written protests against the proposed charges and may do so by mail or in person to the City Clerk no later than the conclusion of the public hearing. If written protests against the charges are presented by owners of a majority of the affected parcels, the City Council may not impose the charges.

The attached resolution authorizes the initiation of the Proposition 218 process based on the maximum rates in accordance with the Guidelines for the Submission and Tabulation of Protests in Exhibit B, and sets a public hearing for November 12, 2024.

Alternatives

1. Take no action.
2. Adjust rates differently while meeting the requirements of the Agreement.

Attachments

A. Resolution
B. Recology 2025 Rate Application
C. HDR Inc. Report – Solid Waste Rate Analysis

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed: The recommended rate increases will cover the solid waste program's revenue requirements.

Source:	**Purpose:**	**Public Outreach:**
Staff	Statutory/Contractual Requirement	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT STATING ITS INTENT TO ADJUST THE MAXIMUM RATES THAT MAY BE CHARGED FOR SOLID WASTE, RECYCLABLE MATERIALS, AND ORGANIC MATERIALS COLLECTION SERVICES EFFECTIVE JANUARY 1, 2025 AND SETTING A PUBLIC HEARING

WHEREAS, solid waste, recyclable materials, and organic materials collection services are provided in the City of Belmont by Recology San Mateo County (Recology) pursuant to a franchise agreement with the City; and,

WHEREAS, the franchise agreement with Recology provides for an annual review of the maximum rates that Recology may charge Belmont residential and commercial customers; and,

WHEREAS, Recology provided the City a letter and detailed worksheet outlining their calculation of the maximum rates for Rate Year 2025 which include a proposed 2.04% increase; and,

WHEREAS, the City is contractually obligated to set maximum rates and desires to conduct a proceeding to adjust the schedule of charges as itemized in Exhibit A.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. Proposes rate revisions and methodology generally described in Exhibits "A" and "B" to this Resolution, which are incorporated herein by reference.

SECTION 2. On November 12, 2024, at 7:00 PM or as soon thereafter as may be practicable in the City Council Chambers located at One Twin Pines Lane, Belmont, CA, or online via Zoom (https://belmont-gov.zoom.us), the City Council will hold a public hearing in accordance with the procedures in California Constitution Article XIIID with respect to the proposed rates. At this hearing, all interested persons will be permitted to present oral and written testimony with respect to the proposed rates and methodology.

SECTION 3. Direct staff to give notice of the hearing in the manner required by law.

SECTION 4. The City will accept and tabulate protests against the proposed rate revision following the procedures set forth in Exhibit "B" to this Resolution, which is incorporated herein by reference.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:
Absent:
Abstain:

ATTEST:

City Clerk

Mayor

APPROVED AS TO FORM:

City Attorney

Exhibit A to Resolution

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

RESIDENTIAL CARTS

	Cart Size (in Gallons)			
	20	**32**	**64**	**96**
1 Pickup Per Week	$41.03	$48.95	$96.36	$144.54

Residential customers are billed based on their Garbage Cart size.
The monthly rate above includes the following:

- One (1) Garbage Cart provided to customer
- Curbside Household Hazardous Waste Collection
- One (1) 64-Gallon Recycling Cart and (1) 96-Gallon Yard Waste Cart

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

COMMERCIAL CARTS

		Cart Size (in Gallons)			
		20	32	64	96
# of Pickups Per Week	1	$52.35	$58.12	$112.40	$162.46
	2	107.69	119.66	226.80	332.78
	3	160.34	178.12	344.13	505.02
	4	220.12	244.57	462.71	683.13
	5	278.50	309.42	588.16	863.66
	6	348.47	387.17	716.74	1,087.16
	7	424.49	471.64	839.05	1,268.34

The monthly rate above includes the following:

One (1) Garbage Cart

Recycling Cart

COMMERCIAL CARTS ORGANICS

		Cart Size (in Gallons)		
		32	64	96
# of Pickups Per Week	1	$40.71	$78.70	$113.72
	2	83.76	158.76	232.94
	3	124.68	240.88	353.51
	4	171.22	323.92	478.18
	5	216.60	411.72	604.56
	6	271.05	501.68	761.00
	7	330.17	587.33	887.84

Not Organics containers are charged at seventy percent (70%) of the similar Garbage commercial cart rate above container size and service levels for Garbage, representing a thirty percent (30%) discount

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

COMMERCIAL BINS

# of Pickups Per Week	Bin Size (in Cubic Yards) 1	2	3	4	6
1	$272.61	$548.36	$827.02	$1,128.96	$1,736.26
2	555.02	1,105.73	1,664.02	2,277.43	3,521.40
3	842.26	1,668.35	2,505.93	3,425.93	5,293.26
4	1,132.86	2,235.07	3,350.35	4,587.49	7,050.05
5	1,425.79	2,809.80	4,197.69	5,753.95	8,831.87
6	1,779.46	3,317.14	5,095.81	6,968.80	10,676.95
7	2,099.54	3,928.58	6,000.20	8,209.08	12,505.21

The monthly rate above includes the following:

One (1) Garbage Bin

Recycling container at customer's requested size

COMMERCIAL BINS ORGANICS

# of Pickups Per Week	Bin Size (in Cubic Yards) 1	2	3	4	6
1	$190.84	$383.86	$578.90	$790.28	$1,215.39
2	388.50	773.99	1,164.85	1,594.20	2,464.99
3	589.57	1,167.86	1,754.16	2,398.14	3,705.27
4	793.00	1,564.54	2,345.25	3,211.25	4,935.04
5	998.06	1,966.83	2,938.37	4,027.75	6,182.32
6	1,245.63	2,321.99	3,567.07	4,878.21	7,473.85
7	1,469.69	2,750.01	4,200.14	5,746.36	8,753.64

Note: Organics containers are charged at seventy percent (70%) of the similar garbage container size above and service level for garbage, representing a thirty percent (30%) discount

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

GARBAGE COMPACTORS	
Commercial Waste 3 Yard Compactor	$1,985.89
Solid Waste Compactor Rate Per Yard	$152.78

The monthly fee above includes the following:
Recycling container at customer's requested size

Schedule Q
Additional Services

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
1	Single-Family Dwelling Backyard Collection Service	Section 5.02.A	See Maximum Rate in the table at the end of this Attachment	See Maximum Rate in the table at the end of this Attachment
2	Long Distance Service for MFD, Mixed Use, and Commercial Accounts (Note: only applicable to Containers with wheels)	Section 5.02.B, 5.02.C; 8.02 B	A - No more than 10% of base monthly Maximum Rate of the Collection Rate for each Container requiring Long Distance Service B - 25% of base monthly Rate of the Collection Rate for each Container requiring Long Distance Service	A - Distance greater than 50 feet and less than or equal to 100 feet B - Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
3	Container Relocation Service	Section 5.02.B and 8.02.B	A - 12% of base monthly Rate of the Collection Rate for each Container requiring Container Relocation Service B - 27% of base monthly Rate of the Collection Rate for each Container requiring Container Relocation Service	A - Distance greater than 50 feet and less than or equal to 100 feet B - Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.
4	On-Call, Pick-up for SFD, MFD, Mixed Use, and Commercial Customers	Section 5.02.A, 5.02.B, and 5.02.C	25% of the base monthly Rate for the size of Container Collected once per week.	Per Collection event per Container for Collection requested by Customer

Schedule Q
Additional Services (Continued)

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
5	Return Trip (SFD, MFD, Mixed Use, or Commercial)	Sections 5.02.A, B, C; 5.03.A, B, C; 5.04.A, B, C	$20.92 for SFD $20.92 for Commercial, Mixed Use, and MFD	Per Collection event (i.e. request to return and provide Collection service after the Customer failed to properly set out their Container(s) for regularly scheduled Collection)
6	Additional Targeted Recyclable Materials or Organic Materials Cart Service for SFD	Sections 5.03.A and 5.04.A	$1.37 per Recycling Cart $4.16 per Organic Materials Cart	Per Cart month (any Cart size). Six month minimum charge required. Includes one-time Cart delivery upon start of service and removal of Cart when service is discontinued by Customer.
7	Additional On-Call Bulky Item Collection	Sections 5.05, 5.06	$113.74	Per Bulky Item Collection event (in addition to the events provided at no charge to Customer pursuant to Section 5.12)
8	Collect Contaminated Targeted Recyclable Materials or Organic Materials Container	Section 6.03.A and 8.02.F	25% of base monthly Solid Waste Rate for the size of Container Collected once per week plus Return Trip Fee if applicable	Per Collection event for Container with Contamination Level greater than the maximum level pursuant to Table 1 in Section 6.02.B
9	Lock Service (Key Service)	Section 8.02.B	A - $11.85 per usage B - $13.24 per usage	Monthly cost: A-Residential Customers B-Commercial Customers
10	Lock Purchase	Section 8.02.B	$23.71 per lock	Per lock

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
11	Overage Service	Section 8.02.G	100% of the base monthly Solid Waste Collection Rate	Per Collection event (after the first two events)
12	Overage Bags Cost	Section 8.02.G	50% of the base monthly Solid Waste Collection Rate or $11.14 minimum	Per bag
13	Container Cleaning Service	Section 8.05.D	A - $69.73 B - $118.54	A - per Cart B - per Bin or Drop-Box Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D.
14	Dirty Cart Replacement (Exchange) Service	Section 8.05.D	A - $90.65 B - $104.60 C - $118.54	A - per 32 gallon Cart B - per 64 gallon Cart C - per 96 gallon Cart Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D.
15	Additional Confidential Document Destruction Service Event	Section 5.07	$1,673.47	Per event

Schedule Q
Additional Services (Continued)

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
16	Additional Compost Material Delivery	Section 5.11	A - $174.31 per delivery B - $348.65 per delivery	A - "one-way" only delivery by Contractor where Contractor delivers to and unloads compost at an Agency-approved location B- "Round-trip" delivery by Contractor where Contractor delivers compost in a Drop Box to an Agency-approved location and returns at a later time or date to pick up the Drop Box and any remaining compost (charge includes the delivery of and later pick-up of the Drop Box)
17	Community Drop-Off Events	Section 5.13	$28,449.23 per event or day	Per event or day targeting 5,000 households. Does not include disposal or public education expenses.

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
18	Collection for Agency-Sponsored and Non-Agency sponsored Community Events	Section 5.08	A - $4,183.70 B - $6,972.84 C - $10,459.27	A - One day event with a projected 2,500 or fewer attendees B - One (1) or two (2) day events with a projected 2,501 to 7,500 attendees per day C - One (1) or two (2) day events with a projected 7,501 to 10,000 attendees per day

Schedule Q
Additional Services (Continued)

Backyard Collection Service Charge for Single Family Dwellings (Section 5.02.A)				
**	One (1) Solid Waste Cart	Two (2) Solid Waste Carts	Three (3) Solid Waste Carts	Four (4) Solid Waste Carts
Distance <= 50 feet	$25.08	$40.03	$80.12	$120.15
50 < Distance <= 100 feet	29.29	44.25	84.29	124.35
100 < Distance <= 150 feet	33.45	48.42	88.45	128.53
150 < Distance <= 200 feet	37.66	52.61	92.64	132.73
200 < Distance <= 250 feet	41.83	56.78	96.85	136.91
250 < Distance <= 300 feet	46.02	60.96	101.03	141.07
300 < Distance <= 350 feet	50.21	65.14	105.22	145.25
Each additional 50 foot increment over 350 feet	Amount equal the difference between the Charge for 250 to 300 feet and 300 to 350 feet			

* Backyard Collection Service Charges are charges added to the base monthly Rate for Single-Family Collection service, and cover the provision of Backyard Collection Service for all Customer's Solid Waste, Recyclable Materials, and Organic Materials Carts.

** Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Cart, if there is no curb.

Exhibit B to Resolution

GUIDELINES FOR THE SUBMISSION AND TABULATION OF PROTESTS SOLID WASTE FEES

Submission of Protests

1. Any property owner or solid waste customer may submit a written protest to the City Clerk, either by delivery to the office of the City Clerk or by submitting the protest at the public hearing. Protests must be received by the end of the public hearing. No postmarks will be accepted.

2. Each protest must identify the affected property (by assessor's parcel number or street address) and include the signature of the record property owner or solid waste customer. Email protests cannot be accepted. Although oral comments at the public hearing will not qualify as a formal protest unless accompanied by a writing, the City Council welcomes input from the community during the public hearing on the proposed fees.

3. If a parcel served by the City is owned by more than a single record owner or customer, each owner or customer may submit a protest, but only one protest will be counted per parcel and any one protest submitted in accordance with these rules will be sufficient to count as a protest for that property.

4. In order to be valid a protest must bear the original signature of the record owner or customer with respect to the property identified on the protest. Protests not bearing the original signature of a record owner or customer shall not be counted.

5. Any person who submits a protest may withdraw it by submitting to the City Clerk a writing request that the protest be withdrawn. The withdrawal of a protest shall contain sufficient information to identify the affected parcel and the name of the record owner or record customer who submitted both the protest and the request that it be withdrawn.

6. A fee protest proceeding is not an election.

7. To ensure transparency and accountability in the fee protest tabulation, protests shall constitute disclosable public records from and after the time they are received.

Tabulation of Protests.

1. The City Clerk shall determine the validity of all protests. The City Clerk shall not accept as valid any protest if the City Clerk determines that any of the following conditions exist:
   a. The protest does not identify a property served by the City.
   b. The protest does not bear an original signature of a record owner of the parcel identified on the protest or of the customer on the parcel.

c. The protest does not state its opposition to the proposed fees.
d. The protest was not received by the City Clerk before the close of the public hearing on the proposed fees.
e. A request to withdraw the protest is received prior to the close of the public hearing on the proposed fees.

3. The City Clerk's decision that a protest is not valid or does not apply to a specific fee shall constitute a final action of the City and shall not be subject to any internal appeal.

4. A majority protest exists if written protests are timely submitted and not withdrawn by the record owners of a majority of the properties subject to the proposed fee.

5. At the conclusion of the public hearing, the City Clerk shall complete the tabulation of all protests received, including those received during the public hearing and shall report the results of the tabulation to the City Council upon completion. If review of the protests received demonstrates that the number received is manifestly less than one-half of the parcels served by the City with respect to the fee which is the subject of the protest, then the Clerk may advise the City Council of the absence of a majority protest without determining the validity of all protests.

Recology
San Mateo County
WASTE ZERO

July 31, 2024

Ms. Nisha Patel
Director of Public Works
City of Belmont
One Twin Pines Lane, Suite 320
Belmont, CA 94002

Re: Rate Year 2025 Rate Application

Dear Ms. Patel:

Enclosed is our Rate Year 2025 Rate Application, Calculation of Actual Disposal Expense (April 2023 through March 2024), Calculation of Projected Disposal Costs (April 2024 – March 2025), Performance Incentive/Disincentive schedule, Attachment L for 2025, CPI index data from the Bureau of Labor Statistics and Attachment Q schedules for 2025.

In accordance with Article 11 of the Franchise Agreement for Recyclable Materials, Organic Materials and Solid Waste Collection Services, we applied the following methodology to our calculations:

- **Wages for CBAs Component** – Multiplied the Wage Component of $1,310,584 by the CPI-W-Wages Index for April 2024 (346.671) and divided that by the CPI-W-Wages Index for April 2020 (290.304). The calculated Wages for CBAs Component for Rate Year 2025 is $1,565,054.

- **Benefits for CBAs Component** – Multiplied the Benefits Component of $608,287 by the CPI-W-Medical Index for April 2024 (587.011) and divided that by the CPI-W-Medical Index for April 2020 (548.136). The calculated Benefits for CBAs Component for Rate Year 2025 is $651,428.

- **Payroll Taxes Component** – Multiplied the Wages for CBAs Component of $1,565,054 by the effective payroll tax rate of 8.1%. The calculated Payroll Taxes Component for Rate Year 2025 is $126,769.

- **Workers Compensation Insurance Component** – Multiplied the Workers Compensation Insurance Component of $93,961 by the CPI-W-Wages Index for April 2024 (346.671) and divided that by the CPI-W-Wages Index for April 2020 (290.304). The calculated Workers Compensation Insurance Component for Rate Year 2025 is $112,205.

- **Direct Fuel Component** - Multiplied the Direct Fuel Component of $169,992 by CPI-U-Motor Fuel Index for April 2024 (397.919) and divided that by the CPI-U-Motor Fuel

Index for April 2020 (209.994). The calculated Direct Fuel Component for Rate Year 2025 is $322,119.

- **General Expenses Direct Component** – Multiplied the General Expenses Direct Component of $191,163 by the CPI-U-General Index for April 2024 (351.247) and divided that by the CPI-U-General Index for April 2020 (298.074). The calculated General Expenses Direct Component for Rate Year 2025 is $225,264.

- **General Expenses Indirect Component** – Multiplied the General Expenses Indirect Component of $1,020,220 by the CPI-U-General Index for April 2024 (351.247) and divided that by the CPI-U-General Index for April 2020 (298.074). The calculated General Expenses Indirect Component for Rate Year 2025 is $1,202,216.

- **SBWMA Approved SB 1383 Costs Component** – Multiplied the SBWMA Approved SB 1383 Costs Component of $18,124 by the CPI-U-General Index for April 2024 (351.247) and divided that by the CPI-U-General Index for April 2024 (338.496). The calculated SBWMA Approved SB 1383 Costs Component for Rate Year 2025 is $18,807.

- **Disposal Costs Component** – The Disposal Costs Component equals (i) Contractor's reasonable good faith projection of Disposal Costs for the period from April 1 of the Current Year through March 31 of the Adjustment Year ($2,434,527), *plus* (ii) Contractor's actual Disposal Costs for the period from April 1 of the Prior Year through March 31 of the Current Year ($2,114,505), *minus* (iii) Contractor's previous projection of Disposal Costs for the period described in clause (ii) ($2,241,715). The calculation of projected disposal costs used in (i) assumed volumes delievered to the Designated Disposal Site using actual volumes delivered during the quarter April 1, 2024 through June 30, 2024, then duplicating those volumes for the next three quarters. The disposal rates are the anticipated rates for 2024 and 2025 at the Designated Disposal Site. The total Disposal Component equals $2,307,317 ($2,434,527 + $2,114,505 - $2,241,715).

- **Performance-Based Component** – Incentives and disincentives were reviewed by RRS consultants and are included in the rate year 2025 compensation application. Incentives total $0 and disincentives total $ 4,487 for a combined disincentive amount of $4,487.

Based on the calculations described above, the Total Target Revenue increase for Rate Year 2025 is 2.04%. The Rate Year 2025 Rate Application includes a calculation of the Potential Cap Carry Forward of $ zero. The Attachment L for 2025 is calculated at 2.04%.

If you have any questions, or need any additional information, please call me at (650) 595-3900.

Sincerely,

John Zirelli

John Zirelli
General Manager
Recology San Mateo County

Recology San Mateo County
City of Belmont
Refuse Rate Index Calculation

Cost Description	Basis for Adjustment	SBWMA-Adjusted 2021 Values	SBWMA Approved SB 1383 Costs	SBWMA-Adjusted 2021 Plus SB 1383	April 2020 CPI Index	April 2024 CPI Index	Adjusted 2025 Rate Year Compensation
Direct Labor Related							
Wages for CBA's	CPI-W: CWURS49BSA0	1,310,584		1,310,584	290.304	346.671	1,565,054
Benefits for CBA's	CPI-W-Medical: CUURS49BSAM	608,287		608,287	548.136	587.011	651,428
Payroll Taxes	Effective Rate: 8.1%	109,005		109,005	na	na	126,769
Workers Compensation	CPI-W: CWURS49BSA0	93,961		93,961	290.304	346.671	112,205
Direct Fuel Costs	CPI-U-Motor Fuel: CUURS49BSE	169,992		169,992	209.994	397.919	322,119
General Expenses Direct	CPI-U: CUURS49BSA0	191,163		191,163	298.074	351.247	225,264
General Expenses Indirect	CPI-U: CUURS49BSA0	1,020,220	-	1,020,220	298.074	351.247	1,202,216
SBWMA Approved SB 1383 Costs	CPI-U: CUURS49BSA0	-	18,124	18,124	338.496	351.247	18,807 (1)
General Expenses Depreciation	Fixed	281,317		281,317	na	na	281,317
Profit Calculation	Operating Ratio of 90.5%	397,271		397,271	na	na	472,919
Interest	Fixed	73,679		73,679	na	na	73,679
Performance Incentives	Based on Annual Report	-		-	na	na	-
Performance Disincentives	Based on Annual Report	-		-	na	na	(4,487)
Base Contractor's Compensation		**4,255,478**	**18,124**	**4,273,602**			**5,047,290**
Disposal Cost Component (i)	Projected Next Rate Year	1,732,663					2,434,527
Disposal Cost Component (ii)	Actual Prior Year						2,114,505
Disposal Cost Component (iii)	Less Projected Prior Year						(2,241,715)
Agency Payments		2,051,120					2,584,051
Total Contractor Compensation		**8,039,261**		**8,057,385**			**9,938,659**

(1) Note: The SB 1383 cost of $18,124 is added to base costs starting in year 2024 and is subject to CPI-U adjustment beginning in year rate 2025 using the beginning CPI Index from April 2023 rather than April 2020.

	2024
Total Contractor Compensation	9,938,659
Cap Carry Forward 11.11	-
Total Target Revenue	**9,938,659**
2024 Target Revenue	9,740,247
Adjustment Multiplier	2.04%

5% Cap Calculation 11.11	
Adjusted Contractor's Compensation 2025	5,051,777
Adjusted Contractor's Compensation 2024	4,874,782
difference	176,996
5 % of Adjusted Contractor's Compensation 2024	243,739
Potential Cap Carry Forward	0

Recology San Mateo County
City of Belmont
Actual Disposal Calculation (Apr 2023 - Mar 2024)
Rate Year 2025

BELMONT CITY VEHICLES

	Solid Waste	Green/Org	Bulky Items	Solid Waste	Green/Org	Dirt	C&D	Concrete	Asphalt	Refrigerators
APR	573.85	454.26	3.22	39.37	16.81	8.44	0.00	0.00	0.00	1.00
MAY	662.89	522.18	2.55	36.58	2.00	15.84	0.00	42.36	0.00	0.00
JUN	640.01	482.35	2.16	30.99	2.67	146.21	0.00	21.85	0.00	0.00
JUL	587.43	420.07	1.83	19.81	6.81	32.11	0.00	49.00	0.00	0.00
AUG	641.13	456.90	1.60	42.36	12.30	38.59	0.00	14.68	0.00	0.00
SEP	592.56	399.59	1.96	31.02	2.41	32.78	0.00	14.32	0.00	0.00
OCT	615.31	405.82	2.74	35.82	14.61	138.69	0.43	20.14	0.00	0.00
NOV	623.60	415.70	3.26	86.80	2.38	16.45	8.44	7.72	0.00	0.00
DEC	618.19	452.07	4.20	31.57	10.98	43.81	2.70	0.00	0.00	0.00
subtotal Apr - Dec 2023	5554.97	4008.94	23.52	354.32	70.97	472.92	11.57	170.07	0.00	1.00
JAN	629.27	471.88	0.00	49.21	6.03	21.20	0.00	0.00	7.12	0.00
FEB	603.24	451.77	2.84	44.22	9.22	1.29	0.00	0.00	0.00	0.00
MAR	622.06	482.48	2.40	43.75	28.41	51.92	0.00	0.00	9.99	0.00
subtotal Jan - Mar 2024	1854.57	1406.13	5.24	137.18	43.66	74.41	0.00	0.00	17.11	0.00
SBWMA Total	7409.54	5415.07	28.76	491.50	114.63	547.33	11.57	170.07	17.11	1.00
Rate Apr 2023 - Dec 2023	$139.00	$150.00	$139.00	$139.00	$150.00	$121.00	$136.00	$121.00	$136.00	$53.00
Rate Jan 2024 - Mar 2024	$165.00	$178.00	$165.00	$165.00	$178.00	$146.00	$165.00	$146.00	$170.00	$53.00
Per Item Cost	$1,078,144.88	$851,632.14	$4,133.88	$71,885.18	$18,416.98	$68,087.18	$1,573.52	$20,578.47		$53.00
Total Disposal	$2,114,505.23									

Recology San Mateo County

City of Belmont

Projected Disposal Calculation (Apr 2024 - Mar 2025)

Rate Year 2025

				BELMONT CITY VEHICLES				
	Solid Waste	Green/Org	Bulky Items	Solid Waste	Green/Org	Dirt	C&D	Each Refrigerator
APR (Actual)	650.48	488.62	3.53	42.97	4.64	95.75	0.00	0.00
MAY (Actual)	636.66	490.32	1.62	37.48	9.70	24.47	0.00	0.00
JUN (Actual)	558.93	385.35	2.40	35.75	11.96	43.85	0.00	1.00
JUL	650.48	488.62	3.53	42.97	4.64	95.75	0.00	0.00
AUG	636.66	490.32	1.62	37.48	9.70	24.47	0.00	0.00
SEP	558.93	385.35	2.40	35.75	11.96	43.85	0.00	1.00
OCT	650.48	488.62	3.53	42.97	4.64	95.75	0.00	0.00
NOV	636.66	490.32	1.62	37.48	9.70	24.47	0.00	0.00
DEC	558.93	385.35	2.40	35.75	11.96	43.85	0.00	1.00
subtotal Apr - Dec	5,538.21	4,092.87	22.65	348.60	78.90	492.21	0.00	3.00
JAN	650.48	488.62	3.53	42.97	4.64	95.75	0.00	0.00
FEB	636.66	490.32	1.62	37.48	9.70	24.47	0.00	0.00
MAR	558.93	385.35	2.40	35.75	11.96	43.85	0.00	1.00
subtotal Jan - Mar	1,846.07	1,364.29	7.55	116.20	26.30	164.07	0.00	1.00
SBWMA Total	7,384.28	5,457.16	30.20	464.80	105.20	656.28	0.00	4.00
Rates Apr 2024 - Dec 2024	$165.00	$178.00	$165.00	$165.00	$178.00	$146.00	$165.00	$58.00
Rates Jan 2025 - Mar 2025	$178.20	$192.24	$173.75	$178.20	$192.24	$161.40	$186.00	$58.00
Per Item Cost	$ 1,242,774.32	$ 990,801.97	$ 5,049.06	$ 78,225.84	$ 19,100.11	$ 98,343.56	$ -	$ 232.00
Total Disposal	$ 2,434,526.87							

Recology San Mateo County
Incentives and Disincentives
Year 2023

Performance Incentive/Disincentive Payments 2023

Member Agency	Performance Incentives and Disincentives				
	SFD and Commercial Missed P/U Events	Average Speed of Answer	90 Second Max Hold Time	Diversion	Maximum Incentives and Disincentives[1]
Belmont	$0	$14,800	$6,562	($11,228)	$4,487
Burlingame	$53	$34,428	$15,265	($26,120)	$10,490
East Palo Alto	$53	$23,939	$10,614	($18,162)	$7,310
Foster City	$0	$21,230	$9,413	($16,107)	$6,436
Hillsborough	$0	$5,478	$2,429	($4,156)	$1,661
Menlo Park	$106	$31,140	$13,807	($23,626)	$9,547
North Fair Oaks	$0	$11,769	$5,218	($8,929)	$3,568
Redwood City	$212	$70,079	$31,071	($53,167)	$21,457
San Carlos	$53	$25,209	$11,177	($19,126)	$7,695
San Mateo	$212	$80,555	$35,716	($61,116)	$24,633
County Franchised Area	$0	$7,892	$3,499	($5,987)	$2,392
WBSD	$0	$3,342	$1,482	($2,535)	$1,013
Total	$690	$329,860	$146,252	($250,260)	$100,690

Negative number in parenthesis denotes Incentive payment due to Recology.

[1]In accordance with Attachment I, the maximum annual incentive or disincentive, except for Single-Family and Commercial Missed Pick-up Events is $100,000 or ($100,000).

Recology San Mateo County

City of Belmont
Attachment L
Rate Year 2025

Adjustment Multiplier 2.04%

RESIDENTIAL RATES

R20G	RES WASTE 20G	41.03
R32G	RES WASTE 32 GAL	48.95
R64G	RES WASTE 64 GAL	96.36
R96G	RES WASTE 96 GAL	144.54

COMMERCIAL/MULTI FAMILY RATES

		Times Per Week						
		1	2	3	4	5	6	7
C1YG	COMML WASTE 1 YD	272.61	555.02	842.26	1,132.86	1,425.79	1,779.46	2,099.54
C1YO	COMML ORGANICS 1 YD	190.84	388.50	589.57	793.00	998.06	1,245.63	1,469.69
C15CG	COMML WASTE 1.5 YD COMPACTOR	993.10	1,986.21	2,979.31	3,972.42	4,965.52	5,958.63	6,951.73
C15CO	COMML ORGANICS 1.5 YD COMPACTOR	695.18	1,390.35	2,085.52	2,780.69	3,475.87	4,171.04	4,866.22
C20G	COMML WASTE 20 GALLON	52.35	107.69	160.34	220.12	278.50	348.47	424.49
C2YG1	COMML WASTE 2 YD	548.36	1,105.73	1,668.35	2,235.07	2,809.80	3,317.14	3,928.58
C2YO	COMML ORGANICS 2 YD	383.86	773.99	1,167.86	1,564.54	1,966.83	2,321.99	2,750.01
C32G	COMML WASTE 32 GALLON	58.12	119.66	178.12	244.57	309.42	387.17	471.64
C32O	COMML ORGANICS 32 GAL	40.71	83.76	124.68	171.22	216.60	271.05	330.17
C3CG	COMML WASTE 3 YD COMPACTOR	1,985.89	0.00	0.00	0.00	0.00	0.00	0.00
C3YG	COMML WASTE 3 YD	827.02	1,664.02	2,505.93	3,350.35	4,197.69	5,095.81	6,000.20
C3YO	COMML ORGANICS 3 YD	578.90	1,164.85	1,754.16	2,345.25	2,938.37	3,567.07	4,200.14
C4YG1	COMML WASTE 4 YD	1,128.96	2,277.43	3,425.93	4,587.49	5,753.95	6,968.80	8,209.08
C4YO	COMML ORGANICS 4 YD	790.28	1,594.20	2,398.14	3,211.25	4,027.75	4,878.21	5,746.36
C64G	COMML WASTE 64 GALLON	112.40	226.80	344.13	462.71	588.16	716.74	839.05
C64O	COMML ORGANICS 64 GAL	78.70	158.76	240.88	323.92	411.72	501.68	587.33
C6YG1	COMML WASTE 6 YD	1,736.26	3,521.40	5,293.26	7,050.05	8,831.87	10,676.95	12,505.21
C6YO	COMML ORGANICS 6 YD	1,215.39	2,464.99	3,705.27	4,935.04	6,182.32	7,473.85	8,753.64
C96G	COMML WASTE 96 GALLON	162.46	332.78	505.02	683.13	863.66	1,087.16	1,268.34
C96O	COMML ORGANICS 96 GAL	113.72	232.94	353.51	478.18	604.56	761.00	887.84

SOLID WASTE COMPACTOR RATE PER YARD	152.78

CPI for Urban Wage Earners and Clerical Workers (CPI-W)
Original Data Value

Series Id: CWURS49BSA0
Not Seasonally Adjusted
Series Title: All items in San Francisco-Oakland-Hayward, CA, urban wage earners and clerical workers, not seasonally adjusted
Area: San Francisco-Oakland-Hayward, CA
Item: All items
Base Period: 1982-84=100
Years: 2014 to 2024

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2014		245.148		247.932		250.085		249.877		250.508		247.680	248.326	247.097	249.555
2015		249.809		252.875		254.736		256.060		256.107		255.492	253.910	252.041	255.780
2016		257.141		259.386		261.017		262.326		264.026		263.222	260.830	258.715	262.946
2017		265.569		268.896		269.508		269.827		271.272		271.342	268.990	267.426	270.555
2018		275.699		278.039		280.219		281.536		283.183		283.278	279.572	277.035	282.110
2019		284.758		288.266		288.581		288.514		291.707		289.456	288.192	286.615	289.770
2020		292.010		290.304		292.420		293.062		294.442		295.687	292.601	291.297	293.906
2021		297.170		302.294		304.971		307.423		309.656		312.019	304.602	300.275	308.928
2022		316.463		322.021		328.137		325.932		329.331		326.465	323.900	320.408	327.391
2023		331.875		333.478		335.725		336.663		337.698		335.597	334.662	332.718	336.605
2024		341.595		346.671		345.789								343.520	

CPI for All Urban Consumers (CPI-U)
Original Data Value

Series Id: CUURS49BSAM
Not Seasonally Adjusted
Series Title: Medical care in San Francisco-Oakland-Hayward, CA, all urban consumers, not seasonally adjusted
Area: San Francisco-Oakland-Hayward, CA
Item: Medical care
Base Period: 1982-84=100
Years: 2014 to 2024

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2014		440.573		448.951											
2016								486.042		486.894		488.508			486.068
2017		485.741		491.228		493.123		489.826		493.957		493.055	490.720	489.198	492.241
2018		500.434		504.092		511.465		508.677		510.198		539.595	508.623	502.138	515.108
2019		519.339		537.178		538.854				551.902		554.645	541.173	532.698	549.647
2020		545.970		548.136		549.438		548.733		549.432		545.016	548.802	549.120	548.484
2021		555.065		555.675		551.518		550.215		556.119		561.352	553.445	552.681	554.209
2022		567.774		573.254		583.038		591.731		587.405			580.306	571.613	588.998
2023				583.268		586.550		591.060		594.003		592.166	588.750	586.600	590.899
2024		586.760		587.011		591.992								588.625	

CPI for All Urban Consumers (CPI-U)
Original Data Value

Series Id: CUURS49BSETB
Not Seasonally Adjusted
Series Title: Motor fuel in San Francisco-Oakland-Hayward, CA, all urban consumers, not seasonally adjusted
Area: San Francisco-Oakland-Hayward, CA
Item: Motor fuel
Base Period: 1982-84=100
Years: 2014 to 2024

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2014	273.919	279.844	297.341	313.061	315.401	312.578	308.499	297.489	287.115	268.189	242.194	216.165	284.316	298.691	269.942
2015	193.209	209.050	250.324	240.323	269.479	253.019	257.434	247.551	223.945	208.973	202.552	196.642	229.375	235.901	222.850
2016	195.010	178.296	191.074	202.420	208.843	213.139	209.663	197.818	204.532	207.138	200.994	200.151	200.757	198.130	203.383
2017	208.379	212.552	223.591	224.219	229.642	227.099	218.805	221.035	233.253	227.464	236.297	232.445	224.565	220.914	228.217
2018	239.938	248.958	254.538	264.816	276.100	277.231	275.852	273.651	274.578	284.833	278.051	264.929	267.790	260.264	275.316
2019	255.355	251.375	259.552	290.028	297.662	280.364	272.104	263.865	268.181	300.258	286.954	261.728	273.952	272.389	275.515
2020	254.945	251.171	235.263	209.994	208.040	220.382	229.239	236.785	239.082	236.633	236.201	237.489	232.935	229.966	235.905
2021	246.145	253.600	277.844	289.079	301.702	310.278	315.657	322.785	321.903	330.112	343.726	342.260	304.591	279.775	329.407
2022	340.187	343.538	408.338	414.030	435.497	464.377	428.878	391.441	401.663	435.974	383.334	325.704	397.747	400.995	394.499
2023	323.764	340.659	354.292	354.844	349.579	350.034	351.675	370.944	398.486	401.688	366.097	340.105	358.514	345.529	371.499
2024	335.924	331.815	359.973	397.919	386.142	359.602								361.896	

CPI for All Urban Consumers (CPI-U)
Original Data Value

Series Id: CUURS49BSA0
Not Seasonally Adjusted
Series Title: All items in San Francisco-Oakland-Hayward, CA, all urban consumers, not seasonally adjusted
Area: San Francisco-Oakland-Hayward, CA
Item: All items
Base Period: 1982-84=100
Years: 2014 to 2024

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2014		248.615		251.495		253.317		253.354		254.503		252.273	251.985	250.507	253.463
2015		254.910		257.622		259.117		259.917		261.019		260.289	258.572	256.723	260.421
2016		262.600		264.565		266.041		267.853		270.306		269.483	266.344	263.911	268.777
2017		271.626		274.589		275.304		275.893		277.570		277.414	274.924	273.306	276.542
2018		281.308		283.422		286.062		287.664		289.673		289.896	285.550	282.666	288.435
2019		291.227		294.801		295.259		295.490		298.443		297.007	295.004	293.150	296.859
2020		299.690		298.074		300.032		300.182		301.736		302.948	300.084	299.109	301.059
2021		304.387		309.419		309.497		311.167		313.265		315.805	309.721	306.724	312.718
2022		320.195		324.878		330.539		328.871		332.062		331.222	327.060	323.408	330.711
2023		337.173		338.496		340.056		340.094		341.219		339.915	339.050	337.689	340.411
2024		345.151		351.247		351.064								347.857	

ATTACHMENT Q
SCHEDULE OF CONTRACTOR'S MAXIMUM RATES FOR ADDITIONAL SERVICES

For Rate Years Eleven (2021) through the remaining Rate Years in the Term, the Maximum Rate for additional services specified in Attachment Q shall be adjusted annually in accordance with Section 11.05. For Rate Year 2025, the current effective Maximum Rates are multiplied by the April 2024 CPI-U-General value of 351.247 and divided by the April 2023 CPI-U-General value of 338.496.

The Maximum Rate for additional services for Rate Year Ten (2020) shall be the Maximum Rates for Rate Year Ten (2020) as determined under the 2009 Franchise Agreement. These amounts will be adjusted as provided in Section 11.05 of this Agreement to determine the Maximum Rates for Rate Year Eleven (2021).

Two additional services are included in this Attachment Q there were not in Attachment Q of the 2009 Franchise Agreement. The two new services are Container Relocation Service and Agency-Specific Reporting for Abandoned Waste Collections. Maximum Rates for these services are presented in the table below.

Charges for Additional Services may not exceed the Maximum Rates approved by the City for the respective Rate Year.

	Service	Reference	Agency-Approved Maximum Rate	Description
	Additional Services for Customers			
1	Single-Family Dwelling Backyard Collection Service	Section 5.02.A	See Maximum Rate in the table at the end of this Attachment	See Maximum Rate in the table at the end of this Attachment
2	Long Distance Service for MFD, Mixed Use, and Commercial Accounts (Note: only applicable to Containers with wheels)	Sections 5.02.B, 5.02.C; and 8.02.B	A – No more than 10% of base monthly Maximum Rate of the Collection Rate for each Container requiring Long Distance Service B – 25% of base monthly Rate of the Collection Rate for each Container requiring Long Distance Service	A – Distance greater than 50 feet and less than or equal to 100 feet B – Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.

ATTACHMENT Q
SCHEDULE OF CONTRACTOR'S MAXIMUM RATES FOR ADDITIONAL SERVICES

	Service	Reference	Agency-Approved Maximum Rate	Description
3	Container Relocation Service	Sections 5.02B and 8.02B	A – 12% of base monthly rate of the Collection Rate for each Container requiring Container Relocation Service B – 27% of base monthly Rate of the Collection Rate for each Container requiring Container Relocation Service	A – Distance greater than 50 feet and less than or equal to 100 feet B – Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.
4	On-Call Pick-up for SFD, MFD, Mixed Use, and Commercial Customers	Sections 5.02.A, 5.02.B, and 5.02.C	25% of the base monthly Rate for the size of Container Collected once per week	Per Collection event per Container for Collection requested by Customer
5	Return Trip (SFD, MFD, Mixed Use, or Commercial)	Sections 5.02.A, B, C; 5.03.A, B, C; 5.04.A, B, C	$20.92 for SFD $20.92 for Commercial, Mixed Use, and MFD	Per Collection event (i.e., request to return and provide Collection service after the Customer failed to properly set out their Container(s) for regularly scheduled Collection)
6	Additional Targeted Recyclable Materials or Organic Materials Cart Service for SFD	Sections 5.03.A and 5.04.A	$1.37 per Recycling Cart $4.16 per Organic Materials Cart	Per Cart per month (any Cart size). Six month minimum charge required. Includes one-time Cart delivery upon start of service and removal of Cart when service is discontinued by Customer.
7	Additional On-Call Bulky Item Collection	Sections 5.05, 5.06	$113.74	Per Bulky Item Collection event (in addition to the events provided at no charge to Customer pursuant to Section 5.12)

ATTACHMENT Q
SCHEDULE OF CONTRACTOR'S MAXIMUM RATES FOR ADDITIONAL SERVICES

	Service	Reference	Agency-Approved Maximum Rate	Description
8	Collect Contaminated Targeted Recyclable Materials or Organic Materials Container	Section 6.03.A and 8.02.F	25% of the base monthly Solid Waste Rate for the size of Container Collected once per week plus Return Trip Fee if applicable	Per Collection event for Container with Contamination Level greater than the maximum level pursuant to Table 1 in Section 6.02.B
9	Lock Service (Key Service)	Section 8.02.B	A – $11.85 per usage B – $13.24 per usage	Monthly cost: A – Residential Customers B – Commercial Customers
10	Lock Purchase	Section 8.02.B	$23.71 per lock	Per lock
11	Overage Service	Section 8.02.G	100% of the base monthly Solid Waste Collection Rate	Per Collection event (after the first two events)
12	Overage Bags Cost	Section 8.02.G	50% of the base monthly Solid Waste Collection Rate or $11.14 minimum	Per bag
13	Container Cleaning Service	Section 8.05.D	A – $69.73 B – $118.54	A – per Cart B – per Bin or Drop-Box Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D

ATTACHMENT Q
SCHEDULE OF CONTRACTOR'S MAXIMUM RATES FOR ADDITIONAL SERVICES

	Service	Reference	Agency-Approved Maximum Rate	Description
14	Dirty Cart Replacement (Exchange) Service	Section 8.05.D	A – $90.65 B – $104.60 C – $118.54	A – per 32 gallon Cart B – per 64 gallon Cart C – per 96 gallon Cart Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D
	Additional Services for Agency			
15	Additional Confidential Document Destruction Service Event	Section 5.07	$1,673.47	Per event
16	Additional Compost Material Delivery	Section 5.11	A – $174.31 per delivery B – $348.65 per delivery	A – "one-way" only delivery by Contractor where Contractor delivers to and unloads compost at an Agency-approved location B – "Round-trip" delivery by Contractor where Contractor delivers compost in a Drop Box to an Agency-approved location and returns at a later time or date to pick up the Drop Box and any remaining compost (charge includes the delivery of and later pick-up of the Drop Box)
17	Community Drop-Off Events	Section 5.13	$28,449.23 per event or day	Per event or day targeting 5,000 households. Does not include disposal or public education expenses.
18	Collection for Agency-Sponsored and Non-Agency sponsored Community Events	Section 5.08	A – $4,183.70 B – $6,972.84 C – $10,459.27	A – One day event with a projected 2,500 or fewer attendees B – One (1) or two (2) day events with a projected 2,501 to 7,500 attendees per day C – One (1) or two (2) day events with a projected 7,501 to 10,000 attendees per day

ATTACHMENT Q
SCHEDULE OF CONTRACTOR'S MAXIMUM RATES FOR ADDITIONAL SERVICES

Backyard Collection Service Charge for Single-Family Dwellings* (Section 5.02.A)				
Distance from Curb**	**Backyard Charge for Customers with One (1) Solid Waste Cart**	**Backyard Charge for Customers with Two (2) Solid Waste Carts**	**Backyard Charge for Customers with Three (3) Solid Waste Carts**	**Backyard Charge for Customers with Four (4) Solid Waste Carts**
Distance <= 50 feet	$25.08	$40.03	$80.12	$120.15
50 < Distance <= 100 feet	$29.29	$44.25	$84.29	$124.35
100 < Distance <= 150 feet	$33.45	$48.42	$88.45	$128.53
150 < Distance <= 200 feet	$37.66	$52.61	$92.64	$132.73
200 < Distance <= 250 feet	$41.83	$56.78	$96.85	$136.91
250 < Distance <= 300 feet	$46.02	$60.96	$101.03	$141.07
300 < Distance <= 350 feet	$50.21	$65.14	$105.22	$145.25
Each additional 50 foot increment over 350 feet	Amount equals the difference between the Charge for 250 to 300 feet and 300 to 350 feet			

* Backyard Collection Service Charges are charges added to the base monthly Rate for Single-Family Collection service, and cover the provision of Backyard Collection Service for all of Customer's Solid Waste, Recyclable Materials, and Organic Materials Carts.

** Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Cart, if there is no curb.

Fiscal & Organizational Sustainability

CITY OF BELMONT

Draft Report





Review of the 2025 Solid Waste Rates

City of Belmont

August 2024

August 22, 2024

Ms. Nisha Patel, P.E.
Public Works Director
City of Belmont
One Twin Pines Lane Suite 385
Belmont, California 94002

Subject: Review of the 2025 Solid Waste Rates Final Report

Dear Ms. Patel:

HDR Engineering, Inc. (HDR) was retained by the City of Belmont (City) to provide professional and technical rate services as they relate to the City's solid waste utility. The City is a member of the South Bayside Waste Management Authority (SBWMA) and has a franchise agreement with Recology of San Mateo County (Recology) for solid waste collection services, including the collection of recycling and organic materials. Through the franchise agreement, the annual compensation for Recology's services is contractually determined. Recology has provided to the City their calculation of the maximum rates for both regularly scheduled services, and additional services, for Rate Year 2025, based on their July 31st rate year 2025 application letter. The franchise agreement calls for the City to adopt solid waste retail rates, but not at a level which exceeds the Contractor's "Maximum Rates for Regularly Scheduled Services".

HDR and the City have reviewed Recology's calculations and this report summarizes our findings, conclusions, and recommendations. This report and HDR's technical review were developed utilizing the City's and Recology's accounting, operating, and management records. HDR has relied upon this information to conduct our limited review, which provides the basis for our findings, conclusions, and recommendations contained in this report.

We appreciate the assistance provided by City staff, management, and City Council. More importantly, we appreciate the opportunity to work with City on this project.

Sincerely yours,
HDR Engineering, Inc.

Shawn Koorn
Associate Vice President

929 108th Ave NE, Suite 1300
Bellevue, WA 98004

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Executive Summary

Introduction

The City of Belmont (City) is a member of the South Bayside Waste Management Authority (SBWMA). On August 28, 2018, the City finalized an Amended and Restated Franchise Agreement (Agreement) with Recology of San Mateo County (Recology) for solid waste collection services, including the collection of recycling and organic materials. The Agreement is for the 15-year period of 2021 to 2035. Through the Agreement (i.e., 7.01.A.5, 11.01.A, 11.06), the annual compensation for Recology's collection and recycling services is contractually determined. At the same time, the Agreement calls for the City to adopt solid waste rates, but not at a level which exceeds the Contractor's "Maximum Rates for Regularly Scheduled and Additional Services". Ultimately, Recology bills the City's customers for the solid waste services at the rates established and formally adopted by the Belmont City Council.

As a part of the overall rate setting process, Recology's data and information is reviewed by an outside party prior to its use within the calculation of the City's maximum rates. Once that data and information is confirmed, Recology calculates the "maximum rates for regularly scheduled and additional services" and provides a copy of those calculations to the City for their review and acceptance. This review and rate setting process is similar to the reviews that HDR has provided to the City annually since 2013, which the City has requested HDR to conduct for rate year 2025.

The Agreement contains specific language and exhibits related to the development of the maximum rates for a given year for both regularly scheduled services (Schedule L) and additional services (Schedule Q). Rate year 2021, the first year of the current Agreement, serves as the base year for adjusting rates in future years. HDR has reviewed the applicable portions of the Agreement as they pertain to the 2025 rate year[1]. From our understanding of the current Agreement and the rate setting requirements, HDR reviewed Recology's submittal for the 2025 rate year. This report discusses the review undertaken by HDR for the 2025 rate year.

Limitations of HDR's Review

HDR has provided a limited review of Recology's maximum rate calculations for the 2025 rate year. As noted above, the data and information used by Recology to calculate the City's maximum rates were independently reviewed by another outside firm. Given the outside review of Recology's data and information, HDR and the City have assumed that the data and information input into Recology's rate calculations are reasonable and appropriate. As part of the review, HDR did cross-check and verify the inputs into Recology's model from the database of previously reviewed basic input data and information.

[1] HDR assisted the City in negotiating a current franchise agreement with Recology and is very familiar with the requirements of the current agreement as it relates to rate setting (Article 11).

Within HDR's review, four key items have been reviewed and verified. These included:

- A review of Recology's methodology for compliance with our understanding of the required methodology specific for the 2025 rate year based on the current Agreement
- A review of the data inputs and information used within the methodology to confirm that the costs and any other adjustments comply with the methodology for regularly scheduled services (Schedule L) for rate year 2025 as required in the current Agreement
- A review of the data inputs and methodology used to adjust additional services (Schedule Q) for the 2025 rate year to confirm the use of the appropriate cost index, as specified in the current Agreement
- Confirmation/verification of the calculations (formulas) within the methodology as they apply to the 2025 rate year based on the current Agreement

Overview of the Agreement

The Agreement with Recology is intended to continue to provide the City of Belmont community with high-quality waste collection, waste reduction, recycling, and composting programs. In order to maximize the quality of services and waste-diversion potential, the City granted to Recology an exclusive right to provide these services within the City. In order to balance that exclusive right to provide these solid waste services against the costs/rates associated with that program, the parties needed to develop an approach or methodology that fairly compensated (and limited) the charges that Recology could charge the City's customers. To address this requirement, Article 11 of the Agreement contains specific language, and a methodology, for annually establishing the maximum rates for the up-coming calendar year for both regularly scheduled (Schedule L) and additional services (Schedule Q).

The Agreement provides for an orderly process and approach to establish rates for the City and compensation for Recology. The review being undertaken by the City and HDR is a part of that orderly process, and the City is performing its due diligence to verify and confirm that the maximum rates calculated by Recology are in accordance with the Agreement. The agreement stipulates this as follows:

The review being undertaken by the City and HDR is a part of that orderly process, and the City is performing its due diligence to verify and confirm that the maximum rates calculated by Recology are in accordance with the Agreement.

Article 11, "The Contractor's Compensation, Pass-Through Costs and Rates" determines the annual compensation for Recology's collection and recycling services. This calculation of annual compensation sets the Contractor's "Maximum Rates for Regularly Scheduled Services" (Attachment L) and "Additional Services" (Attachment Q). Within the franchise agreement, Attachment L is established in 11.04 of Article 11, Annual Adjustment of Maximum Rates for Schedule Services. Attachment Q is established in 11.05 of Article 11, Annual Adjustment of Maximum Rates for Additional Services.

Regularly Scheduled Service (Attachment L) – Review of Recology's Calculated Maximum

On July 31, 2024, Recology provided to the City a letter outlining their calculation of the rates for rate year 2025. The City retained HDR Engineering, Inc. (HDR) to provide the rate review of the proposed 2025 rates as has been performed annually since 2013, which is to confirm that the overall methodology is in conformance with the current Agreement. In addition, HDR also verified or confirmed that the proper cost data appeared to be used within the analysis, and that the mathematical calculations are correct. In providing this review, HDR also attempted to independently calculate the rate index used for Schedule Q rates (e.g., consumer price index (CPI-U General)). This report details the City's process to revise the maximum rates that may be charged for solid waste, recyclable materials, and organic materials collection services for rate year 2025.

The rates that Recology charges its customers include Recology (contractor) compensation, SBWMA costs to operate the Shoreway transfer facility, waste disposal costs, franchise fees, and other related charges. Article 11 of the Agreement provides the framework or methodology for the determination of the maximum rate for the upcoming year. In very simple terms, the Agreement calls for Recology to annually take the existing maximum rate that is in effect and multiply each rate by an "adjustment multiplier". The adjustment multiplier is essentially a cost index to develop Total Target Revenue for the rate year.

The rate adjustment multiplier is composed of three elements; the 2025 Base Contractor's Compensation based on CPI cost adjustments, the 2024 Performance Incentive/Disincentive adjustment, and the 2025 pass through costs which comprise both disposal and agency payments. For 2025, these elements are a total rate index adjustment of 2.04% as shown in Table ES – 1.

Table ES – 1
Summary of 2025 Rate Adjustment to 2024 Rates

Cost Component	2024 Target Revenue	2025 Target Revenue	$ Difference	% Adjustment to 2024 Rates
Total Base Compensation	$4,874,782	$5,047,290	$178,996	3.63%
Performance (Inc.) / Dis.	(6,147)	($4,487)	1,660	-27.01%
Pass Thru Costs	4,871,613	4,891,367	19,755	0.41%
Plus Disincentive Payable 2022	0	0	0	0.00%
Total Target Revenue	**$9,740,247**	**$9,938,658**	**$198,410**	**2.04%**

In the review of Recology's Total Target Revenue for the 2025 rate year, HDR concluded that the total target revenue used the appropriate data and information for the time period and the calculations within the methodology were correct. As a result of our review, HDR concluded that based on the current Agreement, the City's adopted solid waste rates for 2024 should be increased by 2.04% for rate year 2025 proposed rates. Provided in this report is a more detailed

discussion of each of the elements of the calculation of the 2025 maximum rate calculation and the basis for HDR's summary conclusion.

Presented below in Table ES – 2 are the present monthly residential rate and the proposed residential rates for 2025.

Table ES – 2
Summary of the Present and Proposed Residential Solid Waste Rates
(Regularly Scheduled - $/Month)

Schedule	Schedule Description	Present Monthly Rate	Proposed 2024 Rates	$/Month Change
R20G	Residential Waste - 20 Gallons	$40.21	$41.03	$0.82
R32G	Residential Waste - 32 Gallons	47.97	48.95	0.98
R64G	Residential Waste - 64 Gallons	94.43	96.36	1.93
R96G	Residential Waste - 96 Gallons	141.65	144.54	2.89

In addition to the above residential rates for regularly scheduled service, the City and Recology have a number of other rate schedules for regularly scheduled solid waste services. These include the following:

- Commercial Waste Carts (20 gallons to 96 gallons)
- Commercial Waste Bins (1 yard to 6 yards; 1 day to 7 days per week pickup)
- Commercial Organics (1 yard to 6 yards; 1 day to 7 days per week pickup)
- Commercial Organics Carts (20 gallons to 96 gallons; 1 day to 7 days per week pickup)
- Commercial Waste 3 Yard Compactor
- Solid Waste Compactor (per yard)

Each of these commercial rate schedules were increased by the overall 2.04% rate increase. A more detailed discussion of these other regularly scheduled services can be found in Section 4 of the report and also within the Technical Appendices as Attachment L rate schedules.

Additional Services (Attachment Q) – Review of Recology's Calculated Maximum

In addition to the regularly scheduled rates, there are also rates for "additional services". The rates for additional services are contained in Attachment Q of the Agreement and are annually updated in accordance with the Agreement. Attachment Q is established in 11.05 of Article 11, Annual Adjustment of Maximum Rates for Additional Services.

The Maximum Rate set forth in Attachment Q is adjusted annually by multiplying the then effective April CPI-U General for the year in which rates are set and divided by the April CPI-U from the year prior to the year in which rates are set. For example, the April CPI-U-General is 351.247 for 2024 and the April CPI-U-General for 2023 is 338.496. Therefore, each Maximum Rate is multiplied by the April CPI-U-General for 2024 and divided by the April CPI-U-General for

2023. This resulted in an overall rate increase of 3.77% (351.247 / 338.496) for Attachment Q rates effective in 2025 for the additional services.

A more detailed discussion of these additional services can be found in Section 4 of the report and also within the Technical Appendices as Attachment Q rate schedules.

Summary Conclusions and Recommendations

Based on the limited review undertaken, it was the conclusion of HDR that the maximum rates, as calculated by Recology, were in conformance with the City's current Agreement. In reaching this conclusion, HDR has relied on the data and information as supplied by the City and Recology. Given that conclusion, HDR would recommend that the City revise the residential and commercial rates based on the proposed rates as provided in this report which reflects a 2.04% increase for the maximum rate calculation. Finally, the additional services (Attachment Q), as calculated by Recology and as reviewed within this report, should also be adopted for 2025 based on the CPI increase of 3.77%.

City Council Review

The results of the study will be presented to the City of Belmont City Council on September 10, 2024. This will reflect the proposed 2.04% rate adjustment for 2025 rates for the scheduled services, Schedule L, and a 3.77% rate adjustment for additional services, Schedule Q as outlined in this report. If accepted by the City Council, the City will distribute the customer notification as required by Proposition 218, and hold a public hearing no sooner than 45 days from the issuance of the customer notification.

Summary of the Review of Solid Waste Rates

This completes the summary review and analysis for the City's solid waste rates. A full and complete discussion of the review of solid waste rates as calculated by Recology can be found in the following sections of this report.

1 Introduction and Overview of the Report

1.1 Introduction

The City of Belmont (City) is a member of the South Bayside Waste Management Authority (SBWMA). In 2018, the City signed an Agreement with Recology of San Mateo County (Recology) for solid waste collection services, including the collection of recycling and organic materials. As part of the Agreement (i.e., 7.01.A.5, 11.01.A, 11.06), the annual compensation for Recology's collection and recycling services is contractually determined. At the same time, the Agreement calls for the City to adopt solid waste rates, but not at a level which exceeds the Contractor's "Maximum Rates for Regularly Scheduled or Unscheduled Services". Ultimately, Recology bills the City's customers for the solid waste services at the rates established by the City of Belmont City Council.

The 2018 Agreement is for a 15-year term, for rate years 2021 through 2035. While the current Agreement is similar to the 2010 agreement, there are certain differences. Both franchise agreements contain specific language and exhibits related to the development of the maximum rates for a given year.

The general approach for rate adjustments (2022 – 2035) is based on changes in specific cost indices for the primary cost categories outlined by Recology for the base contractor's compensation. For example, in 2025 the costs will be adjusted by the change in the specific cost indices from 2022 to 2024. These cost indices include CPI-U, CPI-U-Motor Fuel, CPI-W, etc. The Agreement has outlined each of the specific cost indices that will be used in escalating the base costs for future year rate adjustments. The total target revenues for rate year 2025 will be compared to the total target revenues for the prior year, in this case the 2024 rate year. This comparison will result in the rate multiplier to be applied to the adopted 2024 rates to establish the proposed 2025 rates.

1.2 Limitations of HDR's Review

It is important to understand that HDR has provided a limited review of Recology's maximum rate calculations for the 2025 rate year. The data and information used by Recology to calculate the City's maximum rates were reviewed by another outside firm. HDR does not provide a review of this basic input data as a part of this review. Therefore, HDR and the City have assumed that the data and information input into Recology's rate calculations are reasonable and appropriate. Having said that, HDR did a limited cross-check to verify the inputs into Recology's model, from the data of previously reviewed basic input data and information.

Within HDR's review, the three key items reviewed were the overall methodology, compliance to the agreed upon methodology, and verification of the data inputs. First, the overall methodology is generally well-laid out within Article 11 of the current Agreement. Given that, HDR reviewed Recology's methodology for compliance with our understanding of the required methodology for the 2025 rate year. At the same time, HDR also reviewed the data inputs and information used within the methodology as applied to the 2024 rate year. While the data and information were previously reviewed, the selection and use of the appropriate costs and

adjustment factors must comply with the methodology. Finally, HDR confirmed/verified the calculations (formulas) used within the methodology as applied to the 2025 rate year were accurate. As a part of HDR's review, these three aspects of Recology's rate filing were reviewed and verified.

1.3 Organization of the Report

This report is organized in a manner that reflects the general approach used by HDR to review Recology's maximum rates for "Regularly Scheduled" and "Additional Services". The next section of this report provides a brief overview of the relevant portions of the Agreement. Section 3 then provides a discussion and overview of the technical review undertaken by HDR of the Recology rate calculations. From that review, HDR was then able to review and verify the proposed maximum rates for Regularly Scheduled and Additional Services. The proposed maximum rates are discussed and shown in Section 4. Finally, Section 5 provides a summary of HDR's findings, conclusions, and recommendations from this study.

2 Overview of the Agreement

2.1 Introduction

An important starting point for reviewing the City's solid waste rates is to gain an understanding of the current Agreement which is an extension of the original 2010 franchise agreement. This section of the report is intended to provide a brief overview of the relevant portions of the City's current Agreement with Recology to help the reader better understand the basis for this review of the rates.

The review and discussion contained herein is not intended to be comprehensive in nature, nor provide any legal interpretation or opinion regarding the relevant portions of this Agreement as it relates to this study.

2.2 Overview of the Agreement

As noted, the agreement was extended in 2018 for an additional 15-year term for rate years 2021 through 2035. The Agreement is very similar to the 2010 franchise agreement but does contain some relevant changes to Article 11 which determines Recology's compensation and the City's solid waste rates. Similar to the 2010 agreement, for 2021 and beyond, Recology's annual compensation for collection and recycling services is outlined in the Agreement and contractually determined. The Agreement calls for the City to establish and adopt solid waste rates, but not at a level which exceeds the Contractor's "Maximum Rates for Regularly Scheduled Services" referred to as Attachment L and "Maximum Rates for Additional Services", referred to as Attachment Q[2]. The Agreement between the parties contains specific language and exhibits related to the development of the maximum rates for a given year for both Attachments L and Q.

...and the City is performing its due diligence to verify and confirm that the maximum rates calculated by Recology are in accordance with the Agreement for the 2024 rate year.

The Agreement provides for an orderly process and approach to establish rates for the City and compensation for Recology. The review being undertaken by the City and HDR is a part of that orderly process, and the City is performing its due diligence to verify and confirm that the maximum rates calculated by Recology are in accordance with the Agreement for the 2025 rate year.

More specific to the Agreement, Article 11 – "The Contractor's Compensation, Pass-Through Costs and Rates" provides the analytical framework for determining the annual compensation for Recology's collection and recycling services. This calculation of annual compensation sets the Contractor's "Maximum Rates for Regularly Scheduled Services" known as Attachment L and "Additional Services" known as Attachment Q. Attachment L is established in 11.04 of Article 11, Annual Adjustment of Maximum Rates for Schedule Services. Attachment Q is established in 11.05 of Article 11, Annual Adjustment of Maximum Rates for Additional Services.

[2] Under the 2010 franchise agreement, Regularly Scheduled services were referred to as Attachment R and Additional Services was referred to as Schedule Q.

2.3 Regularly Scheduled Services (Attachment L)

As noted above, Article 11 of the Agreement provides the analytical framework or methodology for the determination of the maximum rates for the upcoming year. In very simple terms, the Agreement calls for Recology to annually take the existing maximum rate that is in effect and multiply each rate by the "adjustment multiplier". The adjustment multiplier is essentially a "cost index" based on CPI value adjustments to arrive at the Total Target Revenue for the rate year. The Total Target Revenue for the current year is divided by the prior year Total Target Revenue per 11.04.A. as follows:

> *"...Beginning with the adjustment for Rate Year 2022, each Maximum Rate set forth in Attachment L shall be adjusted annually by multiplying the then-effective Maximum Rate by the Adjustment Multiplier. The Adjustment Multiplier used to calculate the Maximum Rates that will be effective in a given Rate Year (the "Adjustment Year") shall be calculated by dividing Total Target Revenue for the Adjustment Year (calculated pursuant to Table 2 below) by Total Target Revenue for the Rate Year prior to the Adjustment Year (the "Current Year")."*[3]

However, for only Rate Year 2022 the "prior" year will be the 2021 adjusted Total Target Revenue of $7,888,920 as follows in 11.04A.

> *"...For purposes of determining Maximum Rates for Rate Year 2022, Total Target Revenue for Rate Year 2021 shall be the same as Total Contractor's Compensation for that year (i.e. $7,888,920)."*[4]

Going forward in rate year 2023 to 2035 the adjustment multiplier will be the current year Total Target Revenue divided by the prior year Total Target Revenue. For example, for rate year 2025 the Total Target Revenue for 2025 rate year will be divided by the rate year 2024 Total Target Revenue.

The franchise agreement provides the cost index for the various components to calculate the Total Target Revenue. The Total Target Revenue is stated in total dollars. For example, the Total Target Revenue for 2024 is $9,740,248. Going forward, for each year the cost index is calculated by adding together the various component costs which are composed of the following cost elements:

- Direct Labor (Wages for CBA's, Benefits for CBA's, Payroll Taxes, Worker's Compensation)
- Direct Fuel Costs
- General Expenses Direct and Indirect
- General Expenses Depreciation
- Profit Calculation
- Interest
- Performance Incentives/Performance Disincentives
- Pass Through Costs

[3] Franchise Agreement, Section 11.04(A), Adjustment Multiplier for Regularly Scheduled Services, p. 99.

[4] Franchise Agreement, Section 11.04(A), Adjustment Multiplier for Regularly Scheduled Services, p. 99.

- Disposal Costs (i) Projected Next Year, (ii) Actual Prior Year, (iii) less Prior Projected Year)
- Agency Payments

The general approach for future year rate adjustments is based on changes in specific cost indices for the primary cost categories outlined by Recology for the base contractor's compensation. For example, in 2025 the costs will be adjusted by the change in the specific cost indices from 2020 to 2024. These cost indices include CPI-U, CPI-U-Motor Fuel, CPI-W, etc. The current Agreement outlines each of the specific cost indices that will be used in escalating the base costs (adjusted 2021 Total Target Revenue) for future year rate adjustments. For rate year 2025, the 2025 Total Target Revenue of $9,938,658 is compared to the 2024 Total Target Revenue of $9,740,248.

Finally, the disposal costs are calculated separately from base contractor's compensation. The current franchise agreement uses a similar approach to establishing the annual adjustments to the disposal costs. Essentially, all increases or changes in disposal costs are passed through as direct rate adjustments to the customer.

2.4 Additional Services (Attachment Q)

The rates for additional services are addressed in the current franchise agreement and are annually updated in accordance with the Agreement. Rates for Additional Services are discussed and established in 11.05 of Article 11, Annual Adjustment of Maximum Rates for Additional Services.

> **11.05 – Annual Adjustment of Maximum Rates for Additional Services**
> *A. The Maximum Rates for Rate Year 2021 for the additional services described in Attachment Q shall be the charges for those services determined under the SBWMA-wide methodology, adjusted as necessary to pass through the Franchise Fee and any other Agency fees under this Agreement. Beginning with the adjustment for Rate Year 2022, each Maximum Rate set forth in Attachment Q shall be adjusted annually by multiplying the then-effective Maximum Rate by April CPI-U-General for the year in which the calculation is made and dividing the result by April CPI-U-General for the year prior to the year in which the calculation is made. For example, to calculate the Maximum Rates set forth in Attachment Q effective in 2025, each such Maximum Rate effective in 2024 shall be multiplied by CPI-U-General for April 2024 and divided by CPI-U-General for April 2023.*

The adjustment to Schedule Q is based upon a cost-indexing approach and a CPI for general inflation is used. As an example, assume the April 2026 CPI-U-General is 300.000 and the April 2025 CPI-U-General is 295.000. This would result in an adjustment to the Additional Services rates of 1.7%. (300.000 / 295.000 = 1.017 or 1.7%).

2.5 Summary

This section of the report has provided a brief overview of the relevant portions of the current Agreement with Recology. While this overview of the Agreement has been necessarily abbreviated, it is intended to provide an understanding of the basic framework or methodology used to calculate the maximum rates for Regularly Scheduled Services and Additional Services.

3 Review of Recology's Calculated Maximum Rates for Regularly Scheduled Services

3.1 Introduction

As stated in the Agreement, Recology calculates the maximum rates for the up-coming calendar year. The calculated maximum rates are formula driven, and as noted in the prior section of the report, there is relatively clear language and numeric examples of the rate setting process. The purpose of this section of the report is to provide an overview of Recology's rate filing to the City for the 2025 rate year, along with HDR's technical review of that filing. Article 11.04 specifically outlines the establishment of maximum rates for 2025 and after for regularly scheduled services.

3.2 Overview of Recology's 2024 Rate Application

On July 31, 2024, Recology provided to the City a letter and the detailed worksheets outlining their calculation of the maximum rates for rate year 2025. The rate application letter indicated a maximum increase adjustment of 2.04%. HDR reviewed that calculation and determined based on the information provided that it appears to agree with the current Agreement.

For 2025, the adjustment multiplier is based on CPI cost adjustment by component. HDR conducted a review of Recology's calculations and determined, based on the information provided, that it appears to be in compliance with the Agreement. Provided below in Table 3 – 1 is an overview of Recology's Total Target Revenue calculation for rate year 2025.

Table 3 – 1
Overview of Recology's Total Target Revenue Calculation Rate Year 2025

Cost Component	Adj. 2021 Target Revenue	April 2020 CPI Index	April 2024 CPI Index	Change 2020 to 2024	2025 Target Revenue
Direct Labor Related					
Wages for CBA'a	$1,310,584	290.304	346.671	1.194	$1,565,054
Benefits for CBA's	608,287	548.136	587.011	1.071	651,428
Payroll Taxes	109,005	N/A	N/A		126,769
Workers Compensation	93,961	290.304	346.671	1.194	112,205
Direct Fuel Costs	169,992	209.994	397.919	1.895	322,119
General Expense Direct & Indirect	1,211,383	298.074	351.247	1.178	1,427,480
SB 1383 (2024)					18,807
Depreciation	281,317	N/A	N/A		281,317
Profit	397,271	N/A	N/A		472,919
Interest	73,679	N/A	N/A		73,679
Performance Inc./Disincentives	0	N/A	N/A		(4,487)
Base Contractor's Compensation	**$4,255,479**				**$5,047,290**
Agency Components					$2,584,050
Disposal Projected Cost (i)					2,434,527
Disposal Actual Prior Year Cost (ii)					2,114,505
Disposal Prior Projected Cost (iii)					(2,241,715)
Disposal Cost Component					**$4,891,367**
Total Target Revenue					**$9,983,658**

(i) The Contractor's projected costs for April 1 of that calendar year through March 31 of the following year plus
(ii) The Contractors' actual costs April 1 of the year prior through March 31 of the calendar year minus
(iii) The contractor's previous projection.

As noted above, the City retained HDR to review the Recology calculations (Table 3 - 1) to confirm that the proper data appeared to be used within the analysis, and that the mathematical calculations were correct for the 2025 rate year. While Table 3 - 1 appears rather simple and straight-forward, the calculations are, in some cases, much more complex with other detailed worksheets behind them.

Provided below is a more detailed discussion of the analytical steps taken to review the Recology calculations and the results of our review.

3.3 Overview of General Approach Used to Review Costs

As noted in Section 2, an important starting point for reviewing Recology's compensation is understanding the Agreement. HDR reviewed the documents, then independently reviewed the rate year 2025 maximum rate calculations. HDR developed spreadsheets to review and attempt to duplicate the Recology calculations for 2025. In this way, HDR could review the data sources

used and verify their appropriateness, while at the same time, verifying the formulas used within the calculations.

3.4 Summary Conclusions of HDR's Review of the Maximum Rate Calculations

Based on HDR's review of Recology's 2025 rate application, HDR concluded that the costs contained in Table 3 - 1 used appropriate cost data and information for the time period and the calculations within the methodology were correct. As a result of our independent review HDR concluded that based upon the existing Agreement, the maximum rates should be calculated based on the increase in rates of 2.04%.

3.5 HDR's Detailed Review of the Total Target Revenue Calculations

As previously discussed, the focus of HDR's review was on the calculations used to establish the Total Target Revenue for rate year 2025 or the "Maximum Rates for Regularly Scheduled Services". Article 11 of the Agreement form the basis for the calculations. As shown in Table 3 - 1, there is one primary calculation component to the maximum rate calculation, the CPI value adjustment.

3.5.1 CPI Value Adjustment

The general approach for future year rate adjustments (2023 – 2035) is based on changes in specific cost indices for the primary cost categories outlined by Recology for the base contractor's compensation. For example, in 2025, the 2021 adjusted base target revenue will be adjusted by the change in the specific cost indices from 2020 to 2024. These cost indices include CPI-U, CPI-U-Motor Fuel, CPI-W, etc. The current Agreement outlines each of the specific cost indices that will be used in escalating the base adjusted target revenue for future year rate adjustments. For Rate Year 2025, and thereafter, the specific cost indices will compare for the current year index to the 2020 index and the 2021 adjusted Total Target Revenue. In simplified terms, general operating costs are adjusted annually by the use of a CPI value. The CPI value index is segregated into nine main components. They are as follows:

- **Direct Labor -** The direct labor includes wages for CBA's, benefits for CBA's, payroll taxes, and worker's compensation. Wages for CBA's, benefits for CBA's, and worker's compensation for base year 2021 is multiplied by the difference between the 2020 base year CPI for that component and the current year (2024) CPI for that component. In very simplified terms, the agreement uses the wages for CBAs at the start of the agreement of 2021 and then simply adjusts wages for CBAs by a CPI amount based on 2020 CPI and the current year CPI. Payroll tax is a formula based on the wage's times 14.9%.
- **Direct Fuel –** The fuel for base year 2021 is multiplied by the difference between the 2020 average price per gallon and the average price per gallon of fuel for the twelve month period ending March 31 of the Calendar Year.
- **General Expense Direct and Indirect –** The general expense base for 2021 is multiplied by the difference between the 2021 base year Consumer Price Index and the current year Consumer Price Index.
- **Depreciation Vehicles, Containers, Indirect –** The vehicle deprecation remains fixed at $196,818 for rate year 2022-2026. Values for rate years 2027-2035 shall be determined

as part of the SBWMA-wide rate application for rate year 2027. The container depreciation remains fixed at $77,090 for rate years 2022-2035 unless additional containers are purchased. The indirect remains fixed at $7,409 for rate years 2022-2035.

- **Profit Calculation** – The profit is calculated by taking the sum of direct labor, direct fuel, general expenses direct and indirect, and the depreciation vehicles, containers and indirect for the current rate year, divide by 0.905, and subtract from the result the sum of direct labor, direct fuel, general expenses direct and indirect, and the depreciation vehicles, containers and indirect for the current rate year components for the rate year. This calculation represents application of the 90.5% operating ratio to Contractor's calculated total annual cost of operations.
- **Disposal Costs** – (i) The Contractor's projected costs for April 1 of that calendar year through March 31 of the following year plus (ii) the Contractors' actual costs April 1 of the year prior through March 31 of the calendar year minus (iii) the contractor's previous projection.
- **Interest** – The value remains fixed at $73,679 for rate years 2022-2035 unless additional vehicles or containers are purchased.
- **Performance-Based** – Is the sum of incentives and disincentives the year immediately preceding the Calendar Year of the Cost Index. The determination of incentives and disincentives is independently determined by another outside party.
- **Agency Payment** – The anticipated amount of total Agency payments as detailed in Article 11 (direct labor, direct fuel, general expenses direct and indirect, depreciation, profit, interest, performance incentives & disincentives, and disposal costs, divided by (1 – 0.26) then multiplying the result by 0.26.

For each of the above components, HDR reviewed the source data and information used within Recology's calculations. As a part of Recology's packet of information, the source data used by Recology was attached to the application letter. While much of the cost data and information had previously been audited by another outside independent consultant, in those cases where other key assumptions to the analysis were needed (e.g., CPI index), HDR attempted to independently review them.

Based on the changes from the 2024 Total Target Revenue to the 2025 Total Target Revenue the costs increased by $198,410 or 2.04% overall ($9,938,658 - $9,740,247 = $198,410 or $198,410 / $9,740,247 = 2.04%). The majority of the components are based on specific cost indexes and/or formulas as explained previously. Disposal costs are based on projections and actuals and are made of three components the (i) Contractor's projected costs, (ii) the Contractors' actual costs of the year prior, and the (iii) Contractor's previous projection. Provided below in Table 3 – 2 is a summary of the changes in target revenue compared from 2024 to 2025.

Table 3 – 2
Summary of Changes in Total Target Revenue from 2024 to 2025

Cost Component	2024 Target Revenue	2025 Target Revenue	$ Difference	% Difference
Base Contractor Compensation				
Direct Labor Related	$2,382,648	$2,455,457	$72,808	3.06%
Direct Fuel Costs	287,249	322,119	34,870	12.14%
General Expense Direct & Indirect	1,393,783	1,446,287	52,503	3.77%
Depreciation	281,317	281,317	0	0.00%
Profit	456,105	472,919	16,815	3.69%
Interest	73,679	73,679	0	0.00%
Total Base Compensation	**$4,874,782**	**$5,051,777**	**$176,996**	**3.63%**
Performance (Inc.) / Dis.	(6,147)	(4,487)	**1,660**	-27.01%
Total Pass Thru Costs				
Disposal Projected Cost (i)	$2,241,715	$2,434,527	$192,812	8.60%
Disposal Actual Prior Year Cost (ii)	1,843,054	2,114,505	271,451	14.73%
Disposal Prior Projected Cost (iii)	(1,745,620)	(2,241,715)	(496,095)	28.42%
Agency Payments	2,532,464	2,584,050	51,587	2.04%
Total Pass Thru Costs	**$4,871,613**	**$4,891,367**	**$19,755**	**0.41%**
Plus Disincentive Payable 2021	0	0	0	0.00%
Total Target Revenue	**$9,740,247**	**$9,938,658**	**$198,410**	**2.04%**

In a more simplified or summarized manner, the rate adjustment multiplier is composed of three elements; the 2025 CPI cost adjustments, the 2024 Incentive/Disincentive adjustment, and the 2025 pass through costs which comprise both disposal and agency payments. Table 3 - 3 summarizes this adjustment by component.

Table 3 – 3
Summary of 2025 Rate Adjustment to 2024 Rates

Cost Component	2024 Target Revenue	2025 Target Revenue	$ Difference	% Adjustment to 2024 Rates
Total Base Compensation	$4,874,782	$5,051,777	$176,996	3.63%
Performance (Inc.)./Dis.	(6,147)	($4,487)	1,660	-27.01%
Pass Thru Costs	4,871,613	4,891,367	19,755	0.41%
Plus Disincentive Payable 2022	0	0	0	0.00%
Total Target Revenue	**$9,740,247**	**$9,938,658**	**$198,410**	**2.04%**

3.6 Conclusions Regarding the Calculation of the Maximum Rate

Based on the review of the Recology rate calculation, HDR concluded that the calculation as provided by Recology appears appropriate and in keeping with the current Agreement. In reaching this conclusion, HDR reviewed and verified the data inputs into the calculation, while also confirming the overall methodology and calculations. Based on our review, the calculated Maximum Rate Index for 2025 is an increase of 2.04% in overall rates for regularly scheduled services.

4 Review of the Proposed 2025 Solid Waste Rates

4.1 Introduction

In the previous section of this report, the cost basis for the City's 2025 solid waste rates was reviewed and provides the basis for determining the City's maximum rates for rate year 2025. This section of the report will review the maximum solid waste rates for Regularly Scheduled Services (Attachment L) and Additional Services (Attachment Q).

4.2 Residential Regularly Scheduled Service (Attachment L)

From the review of the rate index multiplier, it was concluded that the analysis developed by Recology appears to comply with the City's Agreement. The overall adjustment to revenues derived from rates for 2025 is a 2.04% increase in the existing rates. In developing the calculated maximum rates, Recology provided a schedule of the rates. HDR reviewed the calculated maximum rates to confirm that they use the appropriate multiplier. Presented below is a discussion of the present solid waste rates and the proposed 2025 rates for residential and commercial customers. Provided below in Table 4 – 1 are the proposed 2025 Residential rates for Schedule L (regularly scheduled services).

Table 4 – 1
Summary of the Present and Proposed Residential Solid Waste Rates
(Regularly Scheduled - $/Month)

Schedule	Schedule Description	Present Monthly Rate	Proposed 2025 Rates	$/Month Change
R20G	Residential Waste - 20 Gallons	$40.21	$41.03	$0.82
R32G	Residential Waste - 32 Gallons	47.97	48.95	0.98
R64G	Residential Waste - 64 Gallons	94.43	96.36	1.93
R96G	Residential Waste - 96 Gallons	141.65	144.54	2.89

4.3 Commercial Carts Regularly Scheduled Service (Attachment L)

Some commercial waste customers have similar service to the residential customers in that they have cart sizes that range from 20 gallons to 96 gallons. However, a difference between the residential and commercial service is the number of pick-ups per week. A commercial customer may choose their level of service (number of pick-ups per week). Presented in Table 4 – 2 is a summary of the current commercial rates and the calculated maximum rate for 2025. The maximum calculated rate assumes a 2.04% increase from the present rates. Some minor rounding of the rates may occur for purposes of ease of administration.

Table 4 – 2
Summary of the Present and Calculated Max. Commercial Solid Waste Rates
(By Gallon Cart Size; Regularly Scheduled - $/Month)

Schedule		Collection – Times Per Week 1	2	3	4	5	6	7
C20G	**Commercial Waste – 20 Gallon**							
	Present 2024 Monthly Rate	$51.30	$105.54	$157.13	$215.72	$272.93	$341.50	$416.00
	Calculated Maximum 2025 Rate	$52.35	$107.69	$160.34	$220.12	$278.50	$348.47	$424.49
	$/Month Change	$1.05	$2.15	$3.21	$4.40	$5.57	$6.97	$8.49
C32G	**Commercial Waste – 32 Gallon**							
	Present 2024 Monthly Rate	$56.96	$117.27	$174.56	$239.68	$303.23	$379.43	$462.21
	Calculated Maximum 2025 Rate	$58.12	$119.66	$178.12	$244.57	$309.42	$387.17	$471.64
	$/Month Change	$1.16	$2.39	$3.56	$4.89	$6.19	$7.74	$9.43
C64G	**Commercial Waste – 64 Gallon**							
	Present 2024 Monthly Rate	$110.15	$222.27	$337.25	$453.46	$576.40	$702.41	$822.28
	Calculated Maximum 2025 Rate	$112.40	$226.80	$344.13	$462.71	$588.16	$716.74	$839.05
	$/Month Change	$2.25	$4.53	$6.88	$9.25	$11.76	$14.33	$16.77
C96G	**Commercial Waste – 96 Gallon**							
	Present 2024 Monthly Rate	$159.21	$326.13	$494.92	$669.47	$846.39	$1,065.43	$1,242.98
	Calculated Maximum 2025 Rate	$162.46	$332.78	$505.02	$683.13	$863.66	$1,087.16	$1,268.34
	$/Month Change	$3.25	$6.65	$10.10	$13.66	$17.27	$21.73	$25.36

As can be seen, the rates have maintained the existing structure for commercial waste customers with carts.

4.4 Commercial Waste Bins Regularly Scheduled Service

Other commercial customers have larger bins which range in size from 1 yard to 6 yards. These commercial waste customers also have the option of different levels of service and can select the number of pick-ups per week. Presented in Table 4 – 3 is a summary of the current commercial waste bin rates and the calculated maximum rate for 2025. The maximum calculated rate reflects a 2.04% increase from the present rates. Some minor rounding of the rates may occur for purposes of ease of administration.

Table 4 – 3
Summary of the Present and Calculated Max. Commercial Solid Waste Rates
(By Yard Cart Size; Regularly Scheduled - $/Month)

Schedule		Collection – Times Per Week 1	2	3	4	5	6	7
C1YG	**Commercial Waste - 1 Yard**							
	Present 2024 Monthly Rate	$267.16	$543.92	$825.42	$1,110.21	$1,397.29	$1,743.88	$2,057.57
	Calculated Maximum 2025 Rate	$272.61	$555.02	$842.26	$1,132.86	$1,425.79	$1,779.46	$2,099.54
	$/Month Change	$5.45	$11.10	$16.84	$22.65	$28.50	$35.58	$41.97
C2YG	**Commercial Waste - 2 Yard**							
	Present 2024 Monthly Rate	$537.40	$1,083.62	$1,635.00	$2,190.39	$2,753.62	$3,250.82	$3,850.04
	Calculated Maximum 2025 Rate	$548.36	$1,105.73	$1,668.35	$2,235.07	$2,809.80	$3,317.14	$3,928.58
	$/Month Change	$10.96	$22.11	$33.35	$44.68	$56.17	$66.32	$78.54
C2YG1	**Commercial Waste - 2 Yard**							
	Present 2024 Monthly Rate	$537.40	$1,083.62	$1,635.00	$2,190.39	$2,753.62	$3,250.82	$3,850.04
	Calculated Maximum 2025 Rate	$548.36	$1,105.73	$1,668.35	$2,235.07	$2,809.80	$3,317.14	$3,928.58
	$/Month Change	$10.96	$22.11	$33.35	$44.68	$56.17	$66.32	$78.54
C3YG	**Commercial Waste - 3 Yard**							
	Present 2024 Monthly Rate	$810.49	$1,630.75	$2,455.83	$3,283.37	$4,113.77	$4,993.93	$5,880.24
	Calculated Maximum 2025 Rate	$827.02	$1,664.02	$2,505.93	$3,350.35	$4,197.69	$5,095.81	$6,000.20
	$/Month Change	$16.53	$33.27	$50.10	$66.98	$83.92	$101.88	$119.96
C4YG	**Commercial Waste - 4 Yard**							
	Present 2024 Monthly Rate	$1,106.39	$2,231.90	$3,357.44	$4,495.78	$5,638.92	$6,829.48	$8,044.96
	Calculated Maximum 2025 Rate	$1,128.96	$2,277.43	$3,425.93	$4,587.49	$5,753.95	$6,968.80	$8,209.08
	$/Month Change	$22.57	$45.53	$68.49	$91.71	$115.03	$139.32	$164.12
C6YG	**Commercial Waste - 6 Yard**							
	Present 2024 Monthly Rate	$1,701.55	$3,451.00	$5,187.44	$6,909.10	$8,655.30	$10,463.49	$12,255.20
	Calculated Maximum 2025 Rate	$1,736.26	$3,521.40	$5,293.26	$7,050.05	$8,831.87	$10,676.95	$12,505.21
	$/Month Change	$34.71	$70.40	$105.82	$140.95	$176.57	$213.46	$250.01

The commercial waste rates for customers with bins has also maintained the existing rate structure.

4.5 Commercial Organics Bins Regularly Scheduled Service

The rate charged for commercial organics is tied to the commercial waste rate. Commercial organics rates are charged at 70% of the commercial waste rate, for a comparable size bin. Similar to the commercial waste bin customers, commercial organics customers have bins which range in size from 1 yard to 6 yards. Similar to the commercial waste customer, the commercial organics customers also have the option of different levels of service and can select the number of pick-ups per week. Presented in Table 4 – 4 is a summary of the current commercial organics bin rates and the calculated maximum rate for 2025. The maximum calculated rate assumes a 2.04% increase from the present rates. Some rounding of the rates may occur for purposes of ease of administration.

Table 4 – 4
Summary of the Present and Calculated Maximum Commercial Organics
(By Bin Size in Yards; Regularly Scheduled - $/Month)

Schedule		Collection – Times Per Week 1	2	3	4	5	6	7
C1YO	**Commercial Waste - 1 Yard**							
	Present 2024 Monthly Rate	$187.02	$380.73	$577.78	$777.15	$978.11	$1,220.73	$1,440.31
	Calculated Maximum 2025 Rate	$190.84	$388.50	$589.57	$793.00	$998.06	$1,245.63	$1,469.69
	$/Month Change	$3.82	$7.77	$11.79	$15.85	$19.95	$24.90	$29.38
C2YO	**Commercial Waste - 2 Yard**							
	Present 2024 Monthly Rate	$376.19	$758.52	$1,144.51	$1,533.26	$1,927.51	$2,275.57	$2,695.03
	Calculated Maximum 2025 Rate	$383.86	$773.99	$1,167.86	$1,564.54	$1,966.83	$2,321.99	$2,750.01
	$/Month Change	$7.67	$15.47	$23.35	$31.28	$39.32	$46.42	$54.98
C3YO	**Commercial Waste - 3 Yard**							
	Present 2024 Monthly Rate	$567.33	$1,141.56	$1,719.09	$2,298.36	$2,879.63	$3,495.76	$4,116.17
	Calculated Maximum 2025 Rate	$578.90	$1,164.85	$1,754.16	$2,345.25	$2,938.37	$3,567.07	$4,200.14
	$/Month Change	$11.57	$23.29	$35.07	$46.89	$58.74	$71.31	$83.97
C4YO	**Commercial Waste - 4 Yard**							
	Present 2024 Monthly Rate	$774.48	$1,562.33	$2,350.20	$3,147.05	$3,947.23	$4,780.68	$5,631.48
	Calculated Maximum 2025 Rate	$790.28	$1,594.20	$2,398.14	$3,211.25	$4,027.75	$4,878.21	$5,746.36
	$/Month Change	$15.80	$31.87	$47.94	$64.20	$80.52	$97.53	$114.88
C6YO	**Commercial Waste - 6 Yard**							
	Present 2024 Monthly Rate	$1,191.09	$2,415.71	$3,631.19	$4,836.38	$6,058.72	$7,324.43	$8,578.64
	Calculated Maximum 2025 Rate	$1,215.39	$2,464.99	$3,705.27	$4,935.04	$6,182.32	$7,473.85	$8,753.64
	$/Month Change	$24.30	$49.28	$74.08	$98.66	$123.60	$149.42	$175.00

4.6 Commercial Organics Carts Regularly Scheduled Service

Commercial customers can also have the smaller gallon-sized carts for organic waste. Presented in Table 4 – 5 is a summary of the current commercial organics cart rates and the calculated maximum rate for 2025. The maximum calculated rate assumes a 2.04% increase from the present rates. Some minor rounding of the rates may occur for purposes of ease of administration.

Table 4 – 5
Summary of the Present and Calculated Maximum Commercial Organics
(By Gallon Cart Size; Regularly Scheduled - $/Month)

Schedule		Collection – Times Per Week 1	2	3	4	5	6	7
C32O	**Commercial Organics – 32 Gallon**							
	Present 2024 Monthly Rate	$39.90	$82.09	$122.19	$167.80	$212.27	$265.63	$323.57
	Calculated Maximum 2025 Rate	$40.71	$83.76	$124.68	$171.22	$216.60	$271.05	$330.17
	$/Month Change	$0.81	$1.67	$2.49	$3.42	$4.33	$5.42	$6.60
C64O	**Commercial Organics – 64 Gallon**							
	Present 2024 Monthly Rate	$77.13	$155.59	$236.06	$317.44	$403.49	$491.65	$575.59
	Calculated Maximum 2025 Rate	$78.70	$158.76	$240.88	$323.92	$411.72	$501.68	$587.33
	$/Month Change	$1.57	$3.17	$4.82	$6.48	$8.23	$10.03	$11.74
C96O	**Commercial Organics – 96 Gallon**							
	Present 2024 Monthly Rate	$111.45	$228.28	$346.44	$468.62	$592.47	$745.79	$870.09
	Calculated Maximum 2025 Rate	$113.72	$232.94	$353.51	$478.18	$604.56	$761.00	$887.84
	$/Month Change	$2.27	$4.66	$7.07	$9.56	$12.09	$15.21	$17.75

The commercial organics cart rates have maintained the existing rate structure.

4.7 Other Miscellaneous Solid Waste Rates

The solid waste rates also include other solid waste rates for multi-family customers. The maximum calculated rate assumes a 2.04% increase from the present rates. Some minor rounding of the rates may occur for purposes of ease of administration. These rates are shown below in Table 4 – 6.

Table 4 – 6
Summary of the Present and Calculated Maximum Other Miscellaneous Solid Waste Rates (Regularly Scheduled - $/Month)

Schedule		Rate
C3CG	**Commercial Waste 3 Yard Compactor**	
	Present 2024 Monthly Rate	$1,946.19
	Calculated Maximum 2025 Rate	$1,985.89
	$/Month Change	$39.70
	Solid Waste Compactor Rate Per Yard	
	Present 2024 Monthly Rate	$149.73
	Calculated Maximum 2025 Rate	$152.78
	$/Month Change	$3.05

4.8 Rates for Additional Services (Attachment Q)

Recology also provides a number of services that are not considered "regularly scheduled" services and these particular services are not included as a part of the Attachment L rates discussed above. These services are considered "Additional Services" (i.e., Schedule Q) and as discussed in Section 2, they are adjusted using a cost index for general inflation.

The Maximum Rate set forth in Attachment Q is adjusted annually by multiplying the then effective April CPI-U General for the year in which rates are set and divided by the April CPI-U from the year prior to the year in which rates are set. For rate year 2025, the April CPI-U-General is 351.247 for 2024 and the April CPI-U-General for 2023 is 338.496. Therefore, each Maximum Rate is multiplied by the April CPI-U-General for 2024 and divided by the April CPI-U-General for 2023. This resulted in an overall rate increase of 3.77% (351.247 / 338.496) for Attachment Q rates effective in 2025 for the additional services. Details of the Additional Service rates (Schedule Q) can be found in Technical Appendix B.

4.9 City Council Review

The results of the study will be presented to the City of Belmont City Council on September 10, 2024. This will reflect the proposed 2.04% rate adjustment for 2025 rates for the scheduled services, Schedule L, and a 3.77% rate adjustment for additional services, Schedule Q as outlined in this report. If accepted by the City Council, the City will distribute the customer notification as required by Proposition 218, and hold a public hearing no sooner than 45 days from the issuance of the customer notification.

4.10 Summary

HDR reviewed the Recology rate calculation and concluded that the resulting maximum solid waste rates for both regularly scheduled services (Attachment L) and additional services (Attachment Q) for rate year 2025 were calculated in a manner which reflected the intent of the Agreement.

5 Summary of Solid Waste Rate Findings, Conclusions and Recommendations

5.1 Introduction

This report has reviewed the calculated Maximum Rate as developed by Recology. HDR used a systematic process to review the base-year costs, along with the resulting maximum rates for regularly scheduled service.

5.2 Summary Findings, Conclusions and Recommendations

HDR has confirmed that the rate adjustment application and the accompanying maximum rate schedules submitted by Recology meet the requirements of the Agreement. On September 10, 2024, HDR will present the proposed 2025 rates for Schedule L of 2.04% and unscheduled services, Schedule Q, of 3.77% to the City Council. If accepted by the City Council, a public hearing will be set and a customer notification mailed to the City's customers.

5.3 Looking Ahead – Future Rate Adjustment to 2026

The 2026 rate adjustment will include CPI value adjustment components for the current year (2025 for rate year 2026) compared to the 2020 CPI value components and the adjusted 2021 target revenue. The multiplier will be based on the 2026 Total Target Revenue compared to the 2025 Total Target Revenue of $9,938,658.

5.4 Summary

This completes the review conducted by HDR for the City of Belmont on the proposed 2025 Solid Waste rates. This report has met the City's requirement to conduct a due diligence on the proposed compensation to Recology and the resulting regularly scheduled and additional services solid waste rates.

Technical Appendix A – Attachment L
Regularly Scheduled Service

The following table specifies Maximum Allowable Rates for Regularly Scheduled Services. These Maximum Rates shall be adjusted annually in accordance with Article 11. The following Attachment L rates are the proposed 2025 rates.

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

RESIDENTIAL CARTS

	Cart Size (in Gallons)			
	20	**32**	**64**	**96**
1 Pickup Per Week	$41.03	$48.95	$96.36	$144.54

Residential customers are billed based on their Garbage Cart size.

The monthly rate above includes the following:

One (1) Garbage Cart provided to customer

Curbside Household Hazardous Waste Collection

One (1) 64-Gallon Recycling Cart and (1) 96-Gallon Yard Waste Cart

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

COMMERCIAL CARTS

		Cart Size (in Gallons)			
		20	32	64	96
# of Pickups Per Week	1	$52.35	$58.12	$112.40	$162.46
	2	107.69	119.66	226.80	332.78
	3	160.34	178.12	344.13	505.02
	4	220.12	244.57	462.71	683.13
	5	278.50	309.42	588.16	863.66
	6	348.47	387.17	716.74	1,087.16
	7	424.49	471.64	839.05	1,268.34

The monthly rate above includes the following:

One (1) Garbage Cart

Recycling Cart

COMMERCIAL CARTS ORGANICS

		Cart Size (in Gallons)		
		32	64	96
# of Pickups Per Week	1	$40.71	$78.70	$113.72
	2	83.76	158.76	232.94
	3	124.68	240.88	353.51
	4	171.22	323.92	478.18
	5	216.60	411.72	604.56
	6	271.05	501.68	761.00
	7	330.17	587.33	887.84

Not Organics containers are charged at seventy percent (70%) of the similar Garbage commercial cart rate above container size and service levels for Garbage, representing a thirty percent (30%) discount

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

COMMERCIAL BINS

# of Pickups Per Week	Bin Size (in Cubic Yards) 1	2	3	4	6
1	$272.61	$548.36	$827.02	$1,128.96	$1,736.26
2	555.02	1,105.73	1,664.02	2,277.43	3,521.40
3	842.26	1,668.35	2,505.93	3,425.93	5,293.26
4	1,132.86	2,235.07	3,350.35	4,587.49	7,050.05
5	1,425.79	2,809.80	4,197.69	5,753.95	8,831.87
6	1,779.46	3,317.14	5,095.81	6,968.80	10,676.95
7	2,099.54	3,928.58	6,000.20	8,209.08	12,505.21

The monthly rate above includes the following:

One (1) Garbage Bin

Recycling container at customer's requested size

COMMERCIAL BINS ORGANICS

# of Pickups Per Week	Bin Size (in Cubic Yards) 1	2	3	4	6
1	$190.84	$383.86	$578.90	$790.28	$1,215.39
2	388.50	773.99	1,164.85	1,594.20	2,464.99
3	589.57	1,167.86	1,754.16	2,398.14	3,705.27
4	793.00	1,564.54	2,345.25	3,211.25	4,935.04
5	998.06	1,966.83	2,938.37	4,027.75	6,182.32
6	1,245.63	2,321.99	3,567.07	4,878.21	7,473.85
7	1,469.69	2,750.01	4,200.14	5,746.36	8,753.64

Note: Organics containers are charged at seventy percent (70%) of the similar garbage container size above and service level for garbage, representing a thirty percent (30%) discount

Attachment L
Maximum Rate Schedule
Effective January 1, 2025 to December 31, 2025
Monthly Rate

GARBAGE COMPACTORS	
Commercial Waste 3 Yard Compactor	$1,985.89
Solid Waste Compactor Rate Per Yard	$152.78

The monthly fee above includes the following:

Recycling container at customer's requested size

Technical Appendix B – Attachment Q
Additional Services

The following table specifies Maximum Allowable Rates for Additional Services. These Maximum Rates shall be adjusted annually in accordance with Article 11. The following Attachment Q rates are the proposed 2025 rates.

Schedule Q
Additional Services (Continued)

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
1	Single-Family Dwelling Backyard Collection Service	Section 5.02.A	See Maximum Rate in the table at the end of this Attachment	See Maximum Rate in the table at the end of this Attachment
2	Long Distance Service for MFD, Mixed Use, and Commercial Accounts (Note: only applicable to Containers with wheels)	Section 5.02.B, 5.02.C; 8.02 B	A - No more than 10% of base monthly Maximum Rate of the Collection Rate for each Container requiring Long Distance Service B - 25% of base monthly Rate of the Collection Rate for each Container requiring Long Distance Service	A - Distance greater than 50 feet and less than or equal to 100 feet B - Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
3	Container Relocation Service	Section 5.02.B and 8.02.B	A - 12% of base monthly Rate of the Collection Rate for each Container requiring Container Relocation Service B - 27% of base monthly Rate of the Collection Rate for each Container requiring Container Relocation Service	A - Distance greater than 50 feet and less than or equal to 100 feet B - Distance greater than 100 feet Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Container, if there is no curb.
4	On-Call, Pick-up for SFD, MFD, Mixed Use, and Commercial Customers	Section 5.02.A, 5.02.B, and 5.02.C	25% of the base monthly Rate for the size of Container Collected once per week.	Per Collection event per Container for Collection requested by Customer

Schedule Q
Additional Services (Continued)

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
5	Return Trip (SFD, MFD, Mixed Use, or Commercial)	Sections 5.02.A, B, C; 5.03.A, B, C; 5.04.A, B, C	$20.92 for SFD $20.92 for Commercial, Mixed Use, and MFD	Per Collection event (i.e. request to return and provide Collection service after the Customer failed to properly set out their Container(s) for regularly scheduled Collection)
6	Additional Targeted Recyclable Materials or Organic Materials Cart Service for SFD	Sections 5.03.A and 5.04.A	$1.37 per Recycling Cart $4.16 per Organic Materials Cart	Per Cart month (any Cart size). Six month minimum charge required. Includes one-time Cart delivery upon start of service and removal of Cart when service is discontinued by Customer.
7	Additional On-Call Bulky Item Collection	Sections 5.05, 5.06	$113.74	Per Bulky Item Collection event (in addition to the events provided at no charge to Customer pursuant to Section 5.12)
8	Collect Contaminated Targeted Recyclable Materials or Organic Materials Container	Section 6.03.A and 8.02.F	25% of base monthly Solid Waste Rate for the size of Container Collected once per week plus Return Trip Fee if applicable	Per Collection event for Container with Contamination Level greater than the maximum level pursuant to Table 1 in Section 6.02.B
9	Lock Service (Key Service)	Section 8.02.B	A - $11.85 per usage B - $13.24 per usage	Monthly cost: A-Residential Customers B-Commercial Customers
10	Lock Purchase	Section 8.02.B	$23.71 per lock	Per lock

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
11	Overage Service	Section 8.02.G	100% of the base monthly Solid Waste Collection Rate	Per Collection event (after the first two events)
12	Overage Bags Cost	Section 8.02.G	50% of the base monthly Solid Waste Collection Rate or $11.14 minimum	Per bag
13	Container Cleaning Service	Section 8.05.D	A - $69.73 B - $118.54	A - per Cart B - per Bin or Drop-Box Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D.
14	Dirty Cart Replacement (Exchange) Service	Section 8.05.D	A - $90.65 B - $104.60 C - $118.54	A - per 32 gallon Cart B - per 64 gallon Cart C - per 96 gallon Cart Charge only applies to cleaning or Container exchange in addition to the service to be provided at no charge to the Customer pursuant to Section 8.05.D.
15	Additional Confidential Document Destruction Service Event	Section 5.07	$1,673.47	Per event

Schedule Q
Additional Services (Continued)

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
16	Additional Compost Material Delivery	Section 5.11	A - $174.31 per delivery B - $348.65 per delivery	A - "one-way" only delivery by Contractor where Contractor delivers to and unloads compost at an Agency-approved location B- "Round-trip" delivery by Contractor where Contractor delivers compost in a Drop Box to an Agency-approved location and returns at a later time or date to pick up the Drop Box and any remaining compost (charge includes the delivery of and later pick-up of the Drop Box)
17	Community Drop-Off Events	Section 5.13	$28,449.23 per event or day	Per event or day targeting 5,000 households. Does not include disposal or public education expenses.

No.	Additional Service Category	Reference	Agency-Approved Maximum Rate	Description
18	Collection for Agency-Sponsored and Non-Agency sponsored Community Events	Section 5.08	A - $4,183.70 B - $6,972.84 C - $10,459.27	A - One day event with a projected 2,500 or fewer attendees B - One (1) or two (2) day events with a projected 2,501 to 7,500 attendees per day C - One (1) or two (2) day events with a projected 7,501 to 10,000 attendees per day

Schedule Q
Additional Services (Continued)

Backyard Collection Service Charge for Single Family Dwellings (Section 5.02.A)				
**	**One (1) Solid Waste Cart**	**Two (2) Solid Waste Carts**	**Three (3) Solid Waste Carts**	**Four (4) Solid Waste Carts**
Distance <= 50 feet	$25.08	$40.03	$80.12	$120.15
50 < Distance <= 100 feet	29.29	44.25	84.29	124.35
100 < Distance <= 150 feet	33.45	48.42	88.45	128.53
150 < Distance <= 200 feet	37.66	52.61	92.64	132.73
200 < Distance <= 250 feet	41.83	56.78	96.85	136.91
250 < Distance <= 300 feet	46.02	60.96	101.03	141.07
300 < Distance <= 350 feet	50.21	65.14	105.22	145.25
Each additional 50 foot increment over 350 feet	Amount equal the difference between the Charge for 250 to 300 feet and 300 to 350 feet			

* Backyard Collection Service Charges are charges added to the base monthly Rate for Single-Family Collection service, and cover the provision of Backyard Collection Service for all Customer's Solid Waste, Recyclable Materials, and Organic Materials Carts.

** Distance shall be measured from the face of the curb, or from the edge of the roadway nearest the closest edge of the Cart, if there is no curb.

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Elizabeth Wada, Public Works, (650) 595-7468, ewada@belmont.gov
Agenda Title:	Twin Pines Park Stormwater Detention Basin EIR Certification
Agenda Action:	Resolution

Recommendation

Adopt a resolution certifying the Final Environmental Impact Report (EIR), making the findings required by the California Environmental Quality Act (CEQA), adopting the Mitigation Monitoring Program (MMRP), and adopting the Statement of Overriding Considerations for the Twin Pines Park Stormwater Detention Basin Project (Project).

Strategic Focus Area

Infrastructure and Mobility

Background

Belmont Creek (Creek) serves the Belmont community (plus the City of San Carlos and San Mateo County) as a major storm collector that discharges into the San Francisco Bay via the Belmont Slough. The Creek channel includes areas with vegetated channel banks, rock lining, concrete-rubble lining, concrete lining, and concrete culverts. The Belmont Creek watershed encompasses approximately 1,900 acres, originates at an elevation of 700 feet from Pulgas Ridge, and has three substantial tributaries, one near Carlmont Drive, one near Alameda de las Pulgas, and one near University of Notre Dame de Namur. Portions of the creek are on private property without an easement.

Regional flooding in the watershed historically occurs downstream of El Camino Real, where the Creek enters the flat, tidally influenced Harbor/Industrial Area (HIA) before discharging into Belmont Slough. The downstream portion of the creek was designed to convey a 10-year storm; however, due to sedimentation in the downstream channel, more intense events currently exceed the capacity of the system downstream.

The watershed has been studied and analyzed for conveyance capacity, water quality, sedimentation and erosion management, and bank stability. The most recent study, the Belmont Creek Watershed Management Plan (County of San Mateo et al., 2019), was written to analyze the hydraulic performance of nine alternatives. The alternatives included detention basins identified in the County's Stormwater Resource Plan and prioritized the alternatives by cost, flood protection efficacy, water quality and ecosystem benefits, and feasibility of construction. The Belmont Creek Watershed Management Plan proposed a 21.5-acre-foot underground stormwater detention basin within Twin Pines Park to reduce peak flow in Belmont Creek and subsequently reduce flooding downstream. This is the basis for the proposed 9-acre-foot stormwater detention basin within the City Hall parking lot at Twin Pines Park.

The City of Belmont is the Lead Agency for this project. Craftwater Engineering, Inc. is the engineering design firm, and Environmental Science Associates (ESA), an environmental consulting firm, prepared the EIR pursuant to the California Environmental Quality Act (CEQA).

Project Description

The Twin Pines Park Stormwater Detention Basin Project (Project), proposes to construct an underground stormwater storage facility beneath the parking lots or other areas of the 10-acre Twin Pines Park and City Hall Complex. The Project is designed to attenuate the peak stormwater flow of Belmont Creek, to improve water quality and trap sediment and debris, to reduce flood risk in the lower creek reach downstream of El Camino Real, and to provide ancillary water quality benefits. A diversion weir would divert high flows from Belmont Creek to the 9-acre-foot underground storage facility, where water would remain before flowing back into Belmont Creek through a 12-inch outlet pipe. The Project would also include a sediment chamber, bank stabilization at the basin inlet and outlet within Belmont Creek, and an in-stream check structure in Belmont Creek. The Project site is located on four city-owned parcels (Accessor Parcel Numbers 045-170-080, 045-181-250, 045-181-230, and 045-181-280) adjacent to Twin Pines Lane east of Ralston Avenue and south of 6th Avenue in Belmont, therefore no rights-of-way or land acquisition is required to execute the project.

Project Objectives

The Project is a jointly developed with the County of San Mateo, and City of San Carlos with the overarching goal of flood protection for the HIA properties while maintaining habitat and natural surface water features. The Project objectives are to develop a reasonable and cost-effective project that:

- Reduces downstream flooding and maximizes flood protection in the Lower Belmont Creek watershed;
- Reduces erosion and prevent failure of stream banks;
- Reduces downstream sedimentation and need for dredging;
- Minimizes disruption and damage to public and private landowners; and
- Improves water quality through pollutant capture and removal.

Project Components

To fulfill the Project objectives, the City would construct an underground stormwater detention facility at Twin Pines Park. Twin Pines Park is a public park owned and operated by the City that includes picnic areas, playgrounds, a senior and community center, the Manor Building, the City's Parks and Recreation office, and Belmont City Hall. The following sections, along with Figure 1, show and describes the facilities and features of the Project.

<u>Underground Stormwater Storage Facility</u>

The City would construct a 9-acre-foot below-ground stormwater storage facility under the Twin Pines Park parking lot off the main Belmont Creek channel. The underground stormwater storage facility would be constructed in two phases. The first phase, constructed closer to Belmont Creek, would store up to 5 acre-feet of water. The second phase would add storage for up to an additional 4 acre-feet of water. The facility would be 1.6 acres in size and its ceiling would be approximately 2 to 4 feet below the current parking lot surface. The bottom of the facility would be approximately 16 to 18 feet below the ground

surface (at elevation 32.5 feet NAVD88). Water in the storage facility above elevation 36 feet would drain from the storage facility through an outlet pipeline (described below) by gravity. To drain the remaining water between 34 and 38.9 feet, the storage facility would include a sump pump with capacity to pump 318 gallons per minute (0.71 cubic feet per second). The electric sump pump would drain the storage facility within 72 hours.

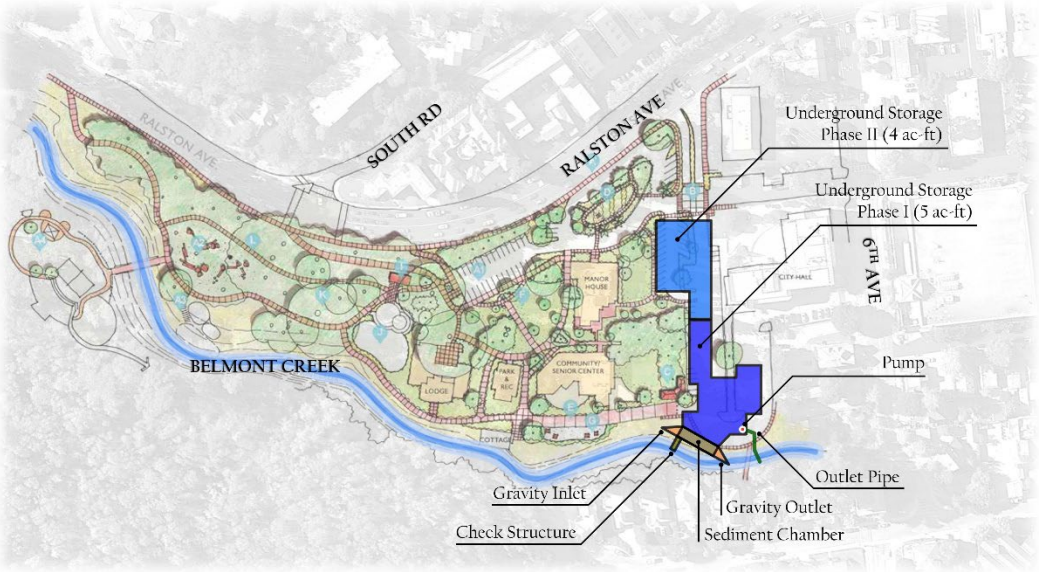


Figure 1

High Flow Diversion Weir

A 40-foot-wide diversion weir would allow high flows from Belmont Creek to pass into the proposed stormwater basin. The diversion weir would be constructed along the creek bank and parallel to the direction of creek flow. The diversion weir would likely consist of four 10-foot-wide electric tilting weir gates that would allow the weir crest elevations to be set at different levels for different sized storm events. The tilting weir gate would provide a flexible and adaptable design to modulate the weir crest elevation by up to 6 feet vertically.

Sediment Chamber

Between the creek and the high flow diversion weir, the City would construct a sediment chamber designed to capture coarse sediment prior to stormflows passing over the weir and into the storage facility. The sediment chamber would be sized to capture approximately 200 cubic yards of coarse sediment, and would be maintained by removing sediment on an as needed basis. The chamber would be approximately 65 feet long, 17 feet wide, and 5 feet deep.

Bank Stabilization

Concrete retaining walls would be constructed along the northern bank of Belmont Creek at the upstream and downstream ends of the sediment chamber to prevent structure undermining and provide channel stability. The toe of the retaining walls would extend to 6 feet below the thalweg elevation in the vicinity of the sediment chamber. Approximately 120 linear feet of bank stabilization consisting of

riprap would be placed along the southern bank of Belmont Creek starting near the upstream concrete retaining wall.

In-Stream Check Structure

A 6-foot-high stone or reinforced concrete check structure spanning the width of Belmont Creek (approximately 40 feet) would increase water surface in-stream and direct water and sediment into the sediment chamber inlet. The check structure would be designed to overtop above the 2-year peak flow. If constructed with stone, the check structure would consist of riprap with a median size greater than 14 inches.

Outlet Pipe

A 12-inch diameter outlet pipe would connect the basin to Belmont Creek downstream of the check structure and the pedestrian bridge and would be sized to allow the detention facility to drain within 72 hours when full. The downstream end of the outlet pipe would include a duckbill valve to prevent sediment or high tailwater in Belmont Creek from entering the pipe. Riprap would be placed along the creek bank at the downstream end of the outlet pipe to prevent scour during outlet pipe operations.

Project Construction

Project construction would proceed in two phases; the first phase (constructing the 5-acre-foot storage facility) would include all of the following activities, and the second phase (constructing the remaining 4-acre-feet of storage north of the first phase's facility) would include the activities listed below, except for the weirs, sedimentation basin, and check structure construction; outlet pipe installation; and landscaping and stream restoration.

- Site mobilization, clearing, grubbing, and vegetation removal
- Demolition of existing parking lot
- Underground storage facility excavation
- Underground storage facility construction and backfill
- Weirs, sedimentation basin, and check structure construction
- Outlet pipe installation
- Park landscaping replacement
- Parking lot reconstruction
- Landscaping and stream restoration
- Ancillary park improvements

Project construction is expected to occur over approximately two years, with the exact schedule to be determined based on funding. During this period, the City would close the main parking lot near City Hall, portions of Twin Pines Lane within the Project area, and the pedestrian bridge across Belmont Creek. The rest of Twin Pines Park would remain open for public use during construction and would be returned to existing conditions once construction is complete. Construction would proceed during the hours of 8:00 a.m. to 5:00 p.m. Monday through Friday except holidays, and 10:00 a.m. to 5:00 p.m. on Saturdays, consistent with the City's noise ordinance. No nighttime construction would be required.

Phase 2 construction is subject to funding and is not yet scheduled but is anticipated to require 9 to 12

months to complete.

Project Operations and Maintenance
The Project components would operate together during wet weather events. When water levels rise to the elevation of the diversion weir, water from Belmont Creek would spill over the diversion weir into the storage facility. Once high flows have passed, water collected in the storage facility would exit the storage facility through the 12-inch outlet pipe back into Belmont Creek. In the event that storage facility capacity is reached and creek flows continued to increase, water from the creek channel would no longer pass through the diversion weir and would instead continue to flow downstream in Belmont Creek. Between winter storms, low flows in Belmont Creek would be diverted through the sediment chamber but would be allowed to exit the chamber just downstream of the check structure.

Project maintenance would include regular inspection and periodic sediment removal (likely annually) from the sediment chamber during the dry season to maintain capacity. The amount of sediment removed would vary depending on storm events and the amount of sediment moving through the Creek, but is estimated to be approximately 200 cubic yards on average. Removed sediment would be hauled to a site within San Mateo County for beneficial reuse or to Ox Mountain Landfill.

The Project would not require new employees to operate the proposed infrastructure as it is anticipated that the Public Works staff would perform the required maintenance such as sediment removal using City-owned vacuum trucks on an as needed basis. Pacific Gas & Electric would provide electricity to the site to power the motors that would control the weirs and the sump pump. The motors are anticipated to operate for less than one hour per week. No emergency generators would be used, and no permanent onsite lighting would be installed.

The EIR can be found on the City's website (https://www.belmont.gov/StormwaterBasin). The following is a summary of key findings identified in the draft documents.

Summary of EIR Findings:

- The EIR completed an analysis of the proposed Project, including both phases and all construction activities.
- The EIR found four areas of resource analysis to have potentially significant impacts requiring mitigation measures:
    - Air Quality and Greenhouse Gas (GHG) Emissions. Mitigation addresses construction emissions by requiring enhanced best management practices for construction-related fugitive dust emissions and Tier 4 engines on construction equipment.
    - Biological Resources. Mitigation reduces construction impacts to sensitive species in Belmont Creek and on the Twin Pines Park site by requiring pre-construction surveys for special-status plants, bats, nesting birds and worker awareness environmental training. Mitigation also addresses permanent impacts in Belmont Creek to riparian habitat by requiring compensation for loss of habitat and a wetland mitigation and monitoring plan.

- Cultural Resources. Mitigation requires development of an Archaeological Resources Data Recovery and Treatment Plan (ARDRTP), in consultation with the Muwekma Ohlone Tribe of the San Francisco Bay Area. Mitigation also requires development of a cultural resources monitoring plan, a cultural resources awareness and sensitivity training program, and informational signage.
- Hydrology and Water Quality. Mitigation addresses in-water construction plan to reduce or avoid the release of pollutants into Belmont Creek; and development of a geomorphic monitoring and adaptive management plan to monitor Belmont Creek for accelerated channel erosion between the outlet of the sediment chamber and the culvert at 6th Avenue and O'Neill Street.

- The EIR found one area of resource analysis to have significant and unavoidable impacts, even with implementation of mitigation measures:

  - Tribal Cultural Resources. Mitigation requires development of an ARDRTP in consultation with the Muwekma Ohlone Tribe of the San Francisco Bay Area.

- Additionally, the Initial Study (Appendix B) found two areas of resource analysis to have potentially significant impacts requiring mitigation measures:

  - Geology and Soils. Mitigation addresses the potential to discover paleontological resources.

  - Noise. Mitigation addresses temporary construction noise and ground-borne vibrations.

- Resources determined to have *less than significant* impacts include aesthetics, agriculture and forestry resources, energy, hazards and hazardous materials, land use and planning, mineral resources, population and housing, public services and recreation, transportation, utilities and service systems, and wildfire.

The EIR considered five alternatives to the Project:

1. **Alternative 1 – No Project.** This alternative describes conditions that would generally be expected to occur without implementation of the Project.
2. **Alternative 2 – Hidden Canyon Park**. The Hidden Canyon Park detention basin consists of approximately 4.14 acre feet of storage accomplished by replacing an existing 60-inch reinforced concrete pipe and installing an 18-inch outfall pipe and an emergency overflow structure. The 27,300-square-foot underground detention basin requires 9,100 cubic yards of excavation, along with landscaping and surface restoration.
3. **Alternative 3 – Notre Dame Belmont High School Softball Field.** The Notre Dame Belmont High School softball field detention basin consists of approximately 11.12 acre feet of storage, a 24-inch inlet and outlet pipes, and an emergency overflow structure. The 102,840-square-foot underground detention basin requires 38,089 cubic yards of excavation, along with softball field-specific surface improvements.

4. **Alternative 4 – Notre Dame de Namur Soccer Field.** The Notre Dame de Namur soccer field detention basin consists of approximately 8.77 acre feet of storage, a 24-inch inlet and outlet pipes, and an emergency overflow structure. The 72,000-square-foot underground detention basin requires 26,667 cubic yards of excavation, along with soccer field-specific surface improvements.
5. **Alternative 5 – Carlmont High School Softball Field.** The Carlmont High School softball field detention basin consists of approximately 13.08 acre feet of storage, a 24-inch and outlet pipes, and an emergency overflow structure. The 131,574-square-foot underground detention basin requires 38,985 cubic yards of excavation, along with softball field-specific surface improvements.

The EIR found that the Project would be the environmentally superior alternative because it would meet all Project objectives and reduce or avoid environmental impacts to the extent feasible.

Planning Commission Hearing

The Planning Commission considered the project at a Public Hearing on June 4, 2024. The Commission indicated that the Draft EIR adequately evaluated potential project environmental impacts and included a reasonable range of project alternatives. No one from the public gave comments; however, the Commission provided comments that have been addressed in the Final EIR.

Timeline for Project

Public comment period for Draft EIR (45 Days)	May 14 through June 28, 2024
City published Final EIR/Response to Comments	August 30, 2024
City Council certifies EIR and approves project	September 10, 2024
Construction begins	TBD

Analysis

Final EIR

The Draft EIR was published on May 14, 2024 and circulated to local, state, and federal agencies and to interested organizations and individuals for their review and comment. The public review period ended on June 28, 2024. The public meeting was held during a regularly scheduled Planning Commission hearing on June 4, 2024 at City Hall, in Belmont. The City received two comment letters during the comment period from the California Department of Fish and Wildlife (CDFW) and the County of San Mateo.

The Final EIR includes three main sections: Introduction, Comments and Responses, and Draft EIR Revisions. The Introduction explains the purpose of the Responses to Comments document is to present comments received on the Draft EIR for the proposed Project, respond in writing to comments on environmental issues, and to revise the Draft EIR as necessary to provide additional clarity.

The Comments and Responses section includes written comments that are grouped according to the public agency. In addition, comments received during the Planning Commission hearing are summarized into main topics. The CDFW comments are related to biological resources. The San Mateo County comments focus on the functionality of the stormwater detention basin. None of the comments received provide new information that warrants recirculation of the Draft EIR. The comments do not identify new

significant impacts or a substantial increase in the severity of previously identified impacts, and do not identify feasible Project alternatives or mitigation measures that are considerably different from those analyzed in the Draft EIR and/or that the City has not agreed to implement.

The Draft EIR Revisions section presents changes and additions to the Draft EIR. The City has made changes and additions to the Draft EIR in response to comments received on the Draft EIR and/or as necessary to clarify statements and conclusions made in the Draft EIR.

Statement of Overriding Considerations

As discussed above, the Project would result in significant and unavoidable impacts to tribal cultural resources, even with implementation of mitigation measures. As such, the City must prepare a Statement of Overriding Considerations to approve the project. In making the statement of overriding considerations, CEQA requires the decision-making agency to balance, as applicable, the economic, legal, social, technological, or other benefits of a proposed project against its unavoidable environmental risks. Thus, if the specific economic, legal, social, technological, or other benefits of a proposed project outweigh the unavoidable adverse environmental effects, the adverse environmental effects may be considered "acceptable."

Should the Council elect to approve the Project, a draft Statement of Overriding Considerations is provided in the resolution, Exhibit B. The draft document identifies multiple project benefits that may outweigh the unavoidable adverse environmental effects of the project, including but not limited to:

- *Increase Flood Protection*. To achieve the Project objective of reducing downstream flooding and maximizing flood protection, the Project would reduce the size of the floodplain in Lower Belmont Creek, upstream of the culvert under US 101, from 120.5 acres to 111 acres during a large flood (an event with a 1 percent chance of occurring in any given year). The Project would also reduce the floodplain area during more frequent events. This would minimize disruption and damage to public and private landowners related to flooding.

- *Reduce Erosion and Prevent Failure of Stream Banks*. Concrete retaining walls would be constructed along the northern bank of Belmont Creek at the upstream and downstream ends of the sediment chamber to prevent structure undermining and provide channel stability. Approximately 120 linear feet of bank stabilization consisting of riprap would be placed along the southern bank of Belmont Creek starting near the upstream concrete retaining wall to prevent failure of stream banks.

- *Reduce Downstream Sedimentation*. The Project includes construction of a sediment chamber designed to capture coarse sediment prior to stormflows passing over the weir and into the storage facility. The sediment chamber would be sized to capture approximately 200 cubic yards of course sediment, and would be maintained by removing sediment on an as needed basis.

- *Improve Water Quality*. The Project is designed to provide ancillary water quality benefits through pollutant capture and removal. Stormwater and water quality best management practices such as

wattles, silt fence, and other stormwater protection measures would be implemented as required by the Section 401 Water Quality Certification and National Pollutant Discharge Elimination System permit.

Alternatives

1. Refer back to staff for more information.
2. Take No Action.

Attachments

A. Resolution
B. Final EIR

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed:

Internal funding sources are budgeted in the Capital Improvement Program Fund under the Twin Pines Park Stormwater Capture Project #6025 (Account #399-3-760-6025-9030), which is funded by the Park Impact Fees Fund and the Storm Drainage Fund.

External funding sources include the following:

Design

- California Natural Resources Agency (CNRA) General Fund Grant

Construction

- CNRA Urban Flood Protection Grant
- Tri-agency Local Match Cost Share - City of Belmont, City of San Carlos, and San Mateo County

Source:	**Purpose:**	**Public Outreach:**
Staff	Discretionary Action	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT CERTIFYING THE FINAL ENVIRONMENTAL IMPACT REPORT (EIR), MAKING THE FINDINGS REQUIRED BY THE CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA), ADOPTING THE MITIGATION MONITORING PROGRAM (MMRP), AND ADOPTING THE STATEMENT OF OVERRIDING CONSIDERATIONS FOR THE TWIN PINES PARK STORMWATER DETENTION BASIN PROJECT

WHEREAS, the City of Belmont ("City") proposes the Twin Pines Park Stormwater Detention Basin Project ("Project"); and,

WHEREAS, the downstream portion of the Belmont Creek was designed to convey a 10-year storm; however, as eroded soil and debris are deposited downstream, more frequent storm events currently exceed the capacity of the system downstream; and,

WHEREAS, the City has studied the watershed and determined that the most cost-effective and efficient project will retain stormwater to attenuate flow from annual storms and trap sediment and debris in a centralized, maintenance-friendly system for later removal; and,

WHEREAS, the City received a grant from the California Natural Resources Agency to design a stormwater detention facility; and,

WHEREAS, the City has designed the Project to provide flood protection for nearby properties while maintaining habitat and natural surface water features; reduce downstream flooding and maximize flood protection in the Lower Belmont Creek watershed; reduce erosion and prevent failure of stream banks; reduce downstream sedimentation and need for dredging; minimize disruption and damage to public and private landowners; and improve water quality through pollutant capture and removal; and,

WHEREAS, the City determined that the Project requires review under the California Environmental Quality Act ("CEQA") (Public Resources Code Sections 2100 et seq.) and the CEQA Guidelines (California Code of Regulations, Title 14, Division 6, Chapter 3, Sections 1500 et seq.); and,

WHEREAS, on October 4, 2023, the City issued a Notice of Preparation of an EIR and Notice of Public Scoping Session for the Project; and,

WHEREAS, written comments from public agencies and members of the public were accepted during the 30-day scoping period that ended at close of business on November 3, 2023; and,

WHEREAS, a Notice of Availability of the Draft EIR was issued on May 14, 2024; and,

WHEREAS, during the public review and comment period, the Planning Commission held a public hearing on June 4, 2024, to receive comments on the Draft EIR; and,

WHEREAS, the 45-day public review and comment period concluded on June 28, 2024; and,

WHEREAS, the EIR is a project-level EIR, as authorized by CEQA Guidelines Section 15161, which focuses on the changes in the environment that would result from construction and operation of a specific development project; and,

WHEREAS, the EIR is also a focused EIR, in accordance with CEQA Guidelines Section 15063(c);; and,

WHEREAS, in accordance with CEQA Guidelines Section 15128, the City prepared an initial study for the project (see Appendix B of the EIR) to identify topics for which the Project's impacts would be less than significant and not require further analysis, and those topics that warrant more detailed environmental analysis in the EIR; and,

WHEREAS, the Final Environmental Impact Report ("Final EIR") consists of the Draft EIR, responses to comments on the Draft EIR, text revisions to the Draft EIR, and all documents incorporated there; and,

WHEREAS, on August 30, 2024, the Final EIR and Notice of Availability of the Final EIR and Notice of Public Hearings by the City Council on September 10, 2024 was transmitted to the State Clearinghouse; and,

WHEREAS, the Findings of Fact Regarding Environmental Impacts, Mitigation Measures, Alternatives and Overriding Considerations for the Project, (the "CEQA Findings and Statement of Overriding Considerations") attached hereto as Exhibits A through C and incorporated herein by reference, have been prepared in order to satisfy the requirements of Public Resources Code § 21081, subdivision (a).

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. The above recitals are true and correct, reflect the independent judgment of the City Council, and are hereby incorporated by this reference.

SECTION 2. Notices of the Planning Commission and City Council hearing on the Draft EIR and the Final EIR for the Project were given as required by law and the actions were conducted pursuant to CEQA Guidelines Sections 15088, 15088.5, 15089, and 15090.

SECTION 3. All individuals, groups, and agencies desiring to comment were given adequate opportunity to submit oral and written comments on the Draft EIR and to submit written comments on the adequacy of the Final EIR for certification. These opportunities for comment meet or exceed the requirements of CEQA and the CEQA Guidelines.

SECTION 4. All comments submitted during the public review and comment period on the Draft EIR have been considered and responded to in the Final EIR, or included in the public record.

SECTION 5. No new comments or information has been submitted during the City

Council hearings on the Twin Pines Stormwater Detention Basin Project that would change the analysis or conclusions of the Final EIR.

SECTION 6. The City Council was presented with all of the information in the administrative record, testimony, and documents constituting the Final EIR, and has reviewed and considered this information and the Final EIR.

SECTION 7. The City Council certifies that the Final EIR for the Project is adequate and complete in compliance with CEQA and the CEQA Guidelines, reflects the independent judgment and analysis of the City, and is adequate and complete for consideration in making a decision on the merits of the Project.

SECTION 8. The City Council adopts the Findings and Statement of Overriding Considerations for the Project attached hereto as Exhibits A and B, and incorporated herein by reference.

SECTION 9. The City Council adopts and incorporates into the Project all of the mitigation measures for the Project that are within the responsibility and jurisdiction of the City that are identified in the Findings.

SECTION 10. The City Council adopts the Mitigation Monitoring and Reporting Program for the Project, attached hereto as Exhibit C, and incorporated herein by reference.

SECTION 11. Belmont City Council certifies the Final EIR for the Project as adequate and complete in compliance with CEQA and CEQA Guidelines, and as adequate and complete for consideration in making a decision on the merits of the Project.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:

Absent:

Abstain:

ATTEST:

City Clerk

Mayor

APPROVED AS TO FORM:

City Attorney

EXHIBIT A
FINDINGS OF FACT
REGARDING THE CITY OF BELMONT TWIN PINES PARK STORMWATER DETENTION BASIN PROJECT
(SCH NO. 2023100139)

The following Findings, the mitigation measures specified herein, and the Mitigation Monitoring and Reporting Program attached hereto are hereby adopted by the City of Belmont (City) in accordance with California Environmental Quality Act (CEQA), Public Resources Code Section 21081, 21081.5 and 21081.6, and the CEQA Guidelines, Title 14, California Code of Regulations, Sections 15091 and 15092 for the Twin Pines Park Stormwater Detention Basin Project (Project).

A. ENVIRONMENTAL REVIEW PROCESS

The Project analyzed in the environmental impact report (EIR) would involve constructing an underground stormwater storage facility beneath the parking lots or other areas of the 10-acre Twin Pines Park, as described below. Pursuant to CEQA, lead agencies are required to consult with public agencies that have jurisdiction over a proposed project and to provide the general public with an opportunity to comment on the Draft EIR.

The City distributed a Notice of Preparation (NOP) of the EIR for a 30-day agency and public review period starting on October 4, 2023 and ending on November 3, 2023 to obtain comments on the proposed scope of the EIR. Once the Draft EIR was prepared, the City of Belmont filed a notice of availability (NOA) and notice of completion (NOC) with the Governor's Office of Planning and Research to begin the 45-day public review period (Public Resources Code [PRC] Section 21161), which began on May 14, 2024, and ended on June 28, 2024. The Draft EIR was made available electronically on the City's website. As a result of these notification efforts, written comments on the content of the Draft EIR were received from two agencies.

The City released the Final EIR for public review on August 30, 2024. The Final EIR consists of copies of all comments received on the Draft EIR, a list of commenters, responses to comments, and revisions to the Draft EIR. The Final EIR, Draft EIR, and Mitigation Monitoring and Reporting Program (MMRP) together comprise the EIR for the Project. The analysis and conclusions contained in the EIR reflect the independent judgment of the City.

B. PROJECT DESCRIPTION

Chapter 2 of the Draft EIR includes a detailed description of the Project.

The Project involves the construction of an underground stormwater storage facility beneath the parking lots or other areas of the 10-acre Twin Pines Park. The Project is designed to attenuate the peak stormwater flow of Belmont Creek, to trap sediment and debris, to reduce flood risk in the flood-prone lower creek reach downstream of El Camino Real, and to provide ancillary water quality benefits. A diversion weir would divert high flows from Belmont Creek to the 9-acre-foot underground storage facility, where water would remain before flowing back into Belmont Creek through a 12-inch outlet pipe. The Project would also include a sediment chamber, bank stabilization at the basin inlet and outlet within Belmont Creek, and an in-stream check structure in Belmont Creek.

The overarching purpose of the Project is to provide flood protection for nearby properties while maintaining habitat and natural surface water features. The Project objectives are to develop a reasonable and cost-effective project that:

Reduces downstream flooding and maximizes flood protection in the Lower Belmont Creek watershed;

Reduces erosion and prevent failure of stream banks;

Reduces downstream sedimentation and need for dredging;

Minimizes disruption and damage to public and private landowners; and

Improves water quality through pollutant capture and removal.

C. SIGNIFICANT UNAVOIDABLE ADVERSE IMPACTS AND DISPOSITION OF RELATED MITIGATION MEASURES

The Final EIR identified the following impacts associated with the Project that would be significant and unavoidable:

1. Tribal Cultural Resources Impact TCR-1: The Project would cause a substantial adverse change in the significance of a tribal cultural resource, as defined in PRC Section 21074. The Project would consist of a substantial amount of ground disturbance including throughout depths where cultural material has been identified at the site to date. The impact would remain significant and unavoidable with implementation of Mitigation Measures CUL-1, CUL-2, CUL-3, and CUL-4, as the Project would result in permanent damage to ancestral human remains that are of significance to the Muwekma, and likely other California Native American Tribes.

2. Tribal Cultural Resources Impact C-TCR-1: The Project, in combination with past, present, and probable future projects in the Project area, would result in significant adverse cumulative tribal cultural resources impacts. Implementation of Mitigation Measures CUL-1 to CUL-4 would reduce Project impacts on tribal cultural resources but the impact would remain significant and unavoidable. Therefore, the Project's contribution to the cumulative impact on tribal cultural resources would be cumulatively considerable, and this cumulative impact would be significant and unavoidable.

For a detailed description of impacts and mitigation measures, see the appropriate text in the Final EIR.

D. SIGNIFICANT IMPACTS IDENTIFIED IN THE EIR THAT ARE REDUCED TO A LEVEL OF "LESS THAN SIGNIFICANT" BY THE MITIGATION MEASURES INCORPORATED INTO THE PROJECT

The Final EIR identified several impacts associated with the Project that would be reduced to a level of less than significant with the implementation of mitigation measures identified in the Final EIR:

1. Air Quality Impact AIR-1: Project construction would result in significant fugitive dust emissions and would not be consistent with the goals of the air quality plan without mitigation. Implementation of

Mitigation Measure AIR-1 would be required to reduce the impact related to fugitive dust emissions to less than significant with mitigation.

2. Air Quality Impact AIR-2: Project construction has the potential to create temporary air quality impacts through emissions of criteria air pollutants, primarily associated with the use of heavy-duty construction equipment, construction workers' vehicle trips, and truck trips for equipment and material transport. While Project emissions would not exceed the BAAQMD construction thresholds of 54 pounds per day, Mitigation Measure AIR-2 (required under Impact AIR-3 to mitigate health risk impacts to a less-than-significant level) would also reduce this impact further by reducing the amount of criteria air pollutants generated by construction equipment. Mitigation Measure AIR-1 would also be implemented to reduce impacts related to fugitive dust emissions to a less-than-significant level.

3. Air Quality Impact AIR-3: Project construction would result in potentially significant emissions of $PM_{2.5}$ and diesel particulate matter that may pose health risks for sensitive receptors. Implementation of Mitigation Measure AIR-2 would reduce health risk impacts from Project construction to below the BAAQMD thresholds with the use of clean construction equipment that meet the Tier 4 Final off-road emission standards as certified by CARB.

4. Air Quality Impact C-AIR-1: The Project, in combination with past, present, and probable future projects in the Project area, would not result in significant adverse cumulative air quality impacts. With implementation of Mitigation Measure AIR-1: BAAQMD Basic Best Management Practices for Construction-Related Fugitive Dust Emissions, Project construction emissions would not exceed the emissions thresholds for ROG, NOx, PM_{10}, or $PM_{2.5}$. The Project's contribution to the regional cumulative air quality impact of the SFBAAB would be less than cumulatively considerable and the impact would be less than significant with mitigation.

5. Biological Resources Impact BIO-1: Special-status species and their habitats may be affected either directly or indirectly through implementation of the Project. Additionally, common (i.e., non-special-status) nesting raptors and migratory birds may also be affected by Project construction. Implementation of Mitigation Measures BIO-1, BIO-2, BIO-3, BIO-4, and BIO-5 would reduce potentially significant impacts to special-status species, nesting raptors, and migratory birds to a less-than-significant level.

6. Biological Resources Impact BIO-2: Project implementation would permanently impact a maximum of 0.217 acre of riparian habitat; however, the actual riparian habitat impact could be much less. Such impacts would be permanent and significant because riparian habitat would displaced by hardscape and in other disturbed areas it would require more than one year to revegetate to pre-Project conditions. Implementation of Mitigation Measure BIO-6 to compensate affected riparian habitat through riparian restoration and enhancement would reduce the impact to less than significant with mitigation.

7. Biological Resources Impact BIO-3: Based on the Project design and the limits of USACE jurisdiction, Project implementation would permanently impact up to 0.026 acre and temporarily impact up to 0.045 acre of federally protected waters of the U.S. Project construction would permanently impact up to 0.073 acre and temporarily impact 0.144 acre of waters of the State and CDFW regulated area protected under Section 1602 of the California Fish and Game Code. Implementation of **Mitigation Measures BIO-6 and BIO-7** and stormwater and water quality best management practices (BMPs), such as wattles, silt fence, and other stormwater protection measures included in Mitigation Measure HYD-1 as required by

the Section 401 Water Quality Certification and National Pollutant Discharge Elimination System permit would reduce the impact to **less than significant with mitigation.**

8. Biological Resources Impact BIO-5: The Project would remove up to seven protected trees. Since the City of Belmont is the implementing entity, the Project would obtain an administrative Tree Removal Permit. With implementation of **Mitigation Measures BIO-1 through BIO-5, the Project would not conflict with any local policies or ordinances protecting biological resources, such as a tree preservation policy or ordinance, and this impact would be less than significant with mitigation.**

9. Biological Resources Impact C-BIO-1: The Project, in combination with past, present, and probable future in the Project area, would not result in significant adverse cumulative impacts on biological resources. With implementation of Mitigation Measure BIO-1 through BIO-7, the Project's contribution to the cumulative impact on biological resources would not be cumulatively considerable, and the impact would be less than significant.

10. Cultural Resources Impact CUL-2: Substantial ground disturbance within a recorded historical resource (P-41-000152) would materially impair the resource's physical characteristics that convey its historical significance and that justify its eligibility for inclusion in the California Register. Implementation of Mitigation Measures CUL-1 to CUL-4 would reduce potentially significant impacts to P-41-000152 to a less-than-significant level.

11. Cultural Resources Impact CUL-3: In the event that Project construction activities result in disturbance of human remains, impacts on the human remains resulting from the Project would be significant. Implementation of Mitigation Measures CUL-1 and CUL-2 would reduce this impact to a less-than-significant level through adherence to State regulations regarding treatment of human remains and coordination with Native American representatives, in the case of any potential indigenous human remains.

12. Cultural Resources Impact C-CUL-1: The Project, in combination with past, present, and probable future projects in the Project area, would not result in significant adverse cumulative cultural resources impacts. Implementation of Mitigation Measures CUL-1 to CUL-4 would reduce Project impacts on archaeological resources and human remains, pursuant to CEQA Guidelines Section 15064.5. Therefore, implementing these mitigation measures would reduce the contribution of the Project to cumulative impacts on archaeological resources and human remains to less than cumulatively considerable, and this cumulative impact would be less than significant.

13. Hydrology and Water Quality Impact HYD-1: If water is present in Belmont Creek during construction of the sediment detention basin or during bank stabilization activities, concrete used for the sediment detention basin or excavation and equipment access associated with bank stabilization could release pollutants directly into Belmont Creek and degrade water quality, resulting in a significant impact. In addition, if work areas must be isolated and dewatered, installation of coffer dams and dewatering without proper management could release pollutants into Belmont Creek. With implementation of Mitigation Measure HYD-1, water quality impacts of Project construction would be less than significant with mitigation.

14. Hydrology and Water Quality Impact HYD-3: The Project would reduce the sediment load along the 200-foot-long reach of Belmont Creek, which could erode the unarmored banks downstream of the Project, resulting in a significant impact. Implementation of Mitigation Measure HYD-2 would reduce the impact to a less-than-significant level by requiring monitoring of the downstream reach for increased erosion due to Project operations and modifying Project operations to avoid further exacerbating erosion.

15. Hydrology and Water Quality Impact HYD-8: Project construction would include work in Belmont Creek channel that could adversely affect water quality by increasing turbidity and potentially releasing fuels and other chemicals associated with construction equipment into Belmont Creek. With implementation of Mitigation Measure HYD-1, the Project would not obstruct implementation of the water quality control plan, and the impact would be less than significant with mitigation.

16. Hydrology and Water Quality Impact C-HYD-1: The Project would not contribute to a cumulative impact related to substantially degrading surface or groundwater quality, conflicting with or obstructing implementation of a water quality control plan or sustainable groundwater management plan, or resulting in substantial erosion or siltation on-or off-site. The City of Belmont would implement the requirements of the California Construction Stormwater General Permit and prepare and implement site-specific, effective stormwater BMPs. Additionally, Mitigation Measure HYD-1 would also be implemented during Project construction to further reduce impacts on water quality. As a result, impacts from the Project related to water quality would not be cumulatively considerable in combination with the other cumulative projects, and the impact would be less than significant with mitigation.

17. Hydrology and Water Quality Impact C-HYD-2: The Project's contribution to impacts related to erosion or siltation would be cumulatively considerable, resulting in a potentially significant impact; however, implementation of Mitigation Measure HYD-2 would reduce potential impacts to a less-than-significant level.

18. Geology and Soils Impact f), from Appendix B, Initial Study: Encountering and inadvertently destroying significant paleontological resource(s) during Project construction would be a significant impact. Therefore, Mitigation Measure GEO-1 would be required to reduce the Project's impacts on significant paleontological resources to a less-than-significant level.

19. Noise Impact a), from Appendix B, Initial Study: The Project would include equipment that could generate noise during construction and operation. Implementation of noise reduction measures outlined in Mitigation Measure NOI-1 would mitigate noise exposure to sensitive receptors from construction activities to the extent feasible to be consistent with the General Plan and Municipal code. Therefore, the Project would not generate a substantial temporary or permanent increase in ambient noise levels in the vicinity of the Project in excess of standards established in the local general plan or noise ordinance and the impact would be less than significant with mitigation.

20. Noise Impact b), Appendix B, Initial Study: The Project would include equipment that could generate vibration during construction and operation. Mitigation Measure NOI-2, would ensure that vibration avoidance and reduction measures are implemented to address potentially significant impacts and reduce them to less than significant with mitigation.

For a detailed description of impacts and mitigation measures, see the appropriate text in the Final EIR.

E. LESS THAN SIGNIFICANT IMPACTS IDENTIFIED IN THE EIR

The Final EIR prepared for the Project identified impacts that would be less than significant with no mitigation measures required:

1. Air Quality Impact AIR-4: The Project would not result in substantial short-term or long-term odors, and the impact would be less than significant.

2. Air Quality Impact AIR-5: The Project would not generate greenhouse gas emissions during construction or operation, either directly or indirectly, that may have a significant impact on the environment, and the impact would be less than significant.

3. Air Quality Impact AIR-6: The Project would not conflict with an applicable plan, policy, or regulation adopted for the purpose of reducing the emissions of greenhouse gas emissions.

4. Impact C-AIR-2: The Project, combined with health risk impacts from other sources in the Project vicinity, would result in less than significant cumulative health risk impacts.

5. Biological Resources Impact BIO-4: The Project would not substantially interfere with the movement of any native resident or migratory fish or wildlife species, established native resident or migratory wildlife corridors, or impede the use of native wildlife nursery sites and the construction and operational impact would be less than significant.

6. Hydrology and Water Quality Impact HYD-2: The Project would not substantially decrease groundwater supplies or interfere substantially with groundwater recharge such that sustainable management of the groundwater basin would be impeded, a less-than-significant impact.

7. Hydrology and Water Quality Impact HYD-4: The Project would not substantially increase the rate or amount of surface runoff in a manner which would result in flooding on- or off-site, a less-than-significant impact.

8. Hydrology and Water Quality Impact HYD-5: The Project would not create or contribute runoff water which would exceed the capacity of existing or planned stormwater drainage system or provide substantial additional sources of polluted runoff, a less-than-significant impact.

9. Hydrology and Water Quality Impact HYD-6: The Project is designed to intentionally impede and redirect flood flows from Belmont Creek into the stormwater storage facility in a manner that would reduce flooding downstream. The Project would reduce the total floodplain area in lower Belmont Creek by up to 12 acres compared to existing conditions. Therefore, while the Project would impede or redirect flood flows, by doing so the Project would reduce flooding and therefore would result in less-than-significant impacts.

10. Hydrology and Water Quality Impact HYD-7: The Project site is not within a tsunami or seiche zone. The portion of Belmont Creek within the Project site is mapped within a flood hazard zone. However, during operations the Project would not store or use potential water quality pollutants within the area

mapped as a flood hazard zone. The Project would not increase the risk of releasing pollutants due to Project inundation, a less-than-significant impact.

11. Aesthetic Impact b): The Project's stormwater storage facility would be underground and would not be visible to the public after construction. Impacts on scenic resources would therefore be temporary and less than significant.

12. Aesthetics Impact c): Once construction is complete, the Project area would be consistent with the existing visual character of the park and would not conflict with applicable zoning and other regulations governing scenic quality. Therefore, the impact would be less than significant.

13. Energy Impact a): Energy use would not be wasteful, inefficient, or unnecessary during construction or operation of the Project and the impact would be less than significant.

14. Energy Impact b): Neither construction nor operation of the Project would conflict with renewable energy plans or energy efficiency plans applicable to the Project and the impact would be less than significant.

15. Geology and Soils Impact a.ii): Adherence to the applicable CBC requirements and local agency enforcement would reduce the risk that the Project would directly or indirectly cause substantial adverse effects, including the risk of loss, injury, or death involving strong seismic ground shaking. Therefore, impacts related to ground shaking during Project construction and operation would be less than significant.

16. Geology and Soils Impact a.iii): Adherence to the applicable CBC requirements and local agency enforcement would reduce the risk that the Project would not directly or indirectly cause substantial adverse effects, including the risk of loss, injury, or death involving liquefaction. Therefore, impacts related to liquefaction during Project construction and operation would be less than significant.

17. Geology and Soils Impact b): Implementation of the mandatory requirements of the SWPPP and established BMPs would avoid the potential for significant impacts associated with loss of topsoil and erosion; thus, the impact would be less than significant.

18. Geology and Soils Impact c): Compliance with the CBC and implementation of recommendations provided in the Geotechnical Exploration report would avoid or reduce impacts related to unstable soils to less than significant.

19. Geology and Soils Impact d): Adherence to the requirements of the CBC and the recommendations in the Geotechnical Exploration report, as described in Draft EIR Section 2.5.6, *Geotechnical Recommendations* of the Project Description, would avoid impacts resulting from potentially expansive soils, and the impact would therefore be less than significant.

20. Hazards and Hazardous Materials Impact a, b): The transport, use, storage, handling, and disposal of hazardous materials for the Project would be adequately controlled through compliance with existing regulatory requirements during construction. This impact would be less than significant.

21. Hazards and Hazardous Materials Impact f): Adherence to existing traffic rules-of-the-road would ensure that the Project does not impair or interfere with an emergency response or evacuation plan, and the impact would be less than significant.

22. Land Use and Planning b): The Project would not conflict with any applicable land use plan, policy, or regulation, and the impact would be less than significant.

23. Recreation Impact a): Due to the temporary nature of construction and the availability of other facilities in the area, the Project would not increase the use of recreational facilities such that substantial physical deterioration of the facility would occur or be accelerated. The impact would be less than significant.

    Transportation Impact a): Construction activities associated with the Project would not generate traffic volume increases that would significantly affect traffic flow on area roadways. The performance of public transit, bicycle, and pedestrian facilities in the area likewise would not be adversely affected. This impact would be less than significant.

24. Transportation Impact b): Construction-generated trips would be temporary and existing Department of Public Works staff would perform regular operations, maintenance, and inspection of the proposed infrastructure. The Project would not generate substantial traffic volume and would not conflict with or be inconsistent with CEQA Guidelines Section 15064.3(b) during construction or operation. Impacts would be less than significant.

25. Transportation Impact c): The Project would not make any changes to the design of the existing street network or driveway access points. Therefore, potential transportation hazard impacts related to road design would be less than significant.

26. Transportation Impact d): Adherence to existing traffic rules-of-the-road would ensure that the Project's construction impacts to emergency access would be less than significant.

27. Utilities and Service Systems a): The Project would not require the relocation or construction of water, wastewater treatment, electric power, natural gas, or telecommunication facilities; thus, this impact would be less than significant.

28. Utilities and Service Systems b): The minimal water needs for the Project would be well within the available water supplies provided by Mid-Peninsula Water District, and there would therefore be sufficient water supplies available to serve the Project and reasonably foreseeable future development. The impact would be less than significant.

29. Utilities and Service Systems d): Based on the daily and remaining capacity of local landfills, the Project would not generate waste in excess of the capacity of local infrastructure, or otherwise impair the attainment of solid waste reduction goals, and the impact would be less than significant.

30. Utilities and Service Systems e): Specifications for Project construction would contain requirements for the handling, storage, cleanup, and disposal of hazardous materials, including petroleum-based products or other construction pollutants. The Project would comply with all applicable regulatory requirements related to solid waste, and the impact would be less than significant.

F. AREAS OF NO IMPACT IDENTIFIED IN THE EIR

The Final EIR prepared for the project identified areas in which the project would have no impact:

1. Biological Resources Impact BIO-6: The Project site is not located within the planning area of an adopted Habitat Conservation Plan, Natural Community Conservation Plan, or other approved local, regional, or state habitat conservation plan. Therefore, there would be no impact from Project construction or operation.

2. Cultural Resources Impact CUL-1: One architectural resource 50 years of age or older, the Twin Pines Park, has been identified in the Project area. The resource has been evaluated as not eligible for the California Register and, therefore, does not qualify as an historical resource according to CEQA Guidelines Section 15064.5. As a result, the Project would have no impact on historical resources and no mitigation measures would be required.

3. Aesthetics Impact a): The Project site is not within the viewshed of a scenic vista and the existing parking lot would be restored to a similar condition after Project construction is complete. Therefore, there would be no effect on scenic vistas, and there would be no impact.

4. Aesthetics Impact d): There would be no new source of substantial light or glare which would affect daytime or nighttime views in the area and there would be no impact.

5. Agriculture and Forestry Resources Impact a): Implementation of the Project would not convert Prime Farmland, Unique Farmland, or Farmland of Statewide Importance to non-agricultural use, and there would be no impact.

6. Agriculture and Forestry Resources Impact b): The Project site is not zoned for agricultural use or on land that is restricted under a Williamson Act contract (CDC, 2016). Therefore, there would be no impact.

7. Agriculture and Forestry Resources Impact c and d): Project implementation would not conflict with existing zoning for, or cause rezoning of, forest land, timberland, or timberland zoned Timberland Production or result in the loss of forest land or conversion of forest land to non-forest use. There would be no impact.

8. Agriculture and Forestry Resources Impact e): The Project area is not currently used for farmland or agricultural uses therefore, there would be no impact.

9. Geology and Soils Impact a.i): The Project would not directly or indirectly cause potential substantial adverse effects related to surface fault rupture and there would be no impact.

10. Geology and Soils Impact a.iv): As there are no habitable structures proposed as part of the Project, and the surrounding area has a low susceptibility to landslides, the Project would not directly or indirectly cause substantial adverse effects involving landslides and there would be no impact related to landslides, either seismic or gravity-induced.

11. Geology and Soils Impact e): The Project would not install any septic tanks or alternative wastewater disposal systems. Therefore, there would be no impact related to adequate soil to support such systems.

12. Hazards and Hazardous Materials Impact c): There are no schools within 0.25 miles of the Project site. Therefore, the Project would not produce hazardous emissions or handle hazardous materials in the vicinity of an existing or planned school, and there would be no impact.

13. Hazards and Hazardous Materials Impact d): A review of the Department of Toxic Substances Control EnviroStor database and the State Water Resource Control Board GeoTracker database records indicate that the Project site is not located on a list of hazardous materials, nor are there any sites in the vicinity of the Project site. There would be no impact under this criterion.

14. Hazards and Hazardous Materials Impact e): The Project site is not within any of the safety zones or noise contours established for the San Carlos Airport, there would be no impact related to safety or noise hazards to people that may be working or residing in the area.

15. Hazards and Hazardous Materials Impact g): The Project site is not within a Local Responsibility Area and is not designated by the City of Belmont as a High Fire Hazard Area or Very High Fire Hazard Area. Therefore, there would be no impact related to wildland fires.

16. Land Use and Planning Impact a): The Project would not result in the physical division or isolation of an established community and there would be no impact.

17. Mineral Resources Impact a, b): there are no known mineral resources located in the Project vicinity that would be of value to the region and the residents of the state The City's General Plan did not identify any locally important mineral resource recovery sites on or near the Project site. There would be no impact on mineral resources.

18. Noise Impact c): Construction workers for the Project may be exposed to periodic short-term aircraft overflight noise associated with this airport; however, the average construction activity noise levels that the workers would be exposed to would be greater than the average overflight noise levels that they would be exposed to. Therefore, there would be no impact.

19. Population and Housing Impact a, b): The Project would not induce population growth or displace existing housing or people, necessitating the construction of replacement housing elsewhere. There would be no impact on Population and Housing.

20. Public Services Impact a): Project construction and operation would not result in an increase in population, no new or expanded public services would be required and there would be no impact on Public Resources.

21. Recreation Impact b): There would be no impact related to the construction or expansion of recreational facilities which might have an adverse physical effect on the environment.

22. Utilities and Service Systems Impact c): The construction of new water or wastewater treatment facilities or expansion of existing facilities would therefore not be required, therefore, there would be no impact.

23. Wildfire a-d): The Project site is within a Local Responsibility Area and is not designated by the City of Belmont as a High Fire Hazard Area or Very High Fire Hazard Area. Additionally, the Project does not include installation or maintenance of infrastructure that may exacerbate wildfire risks. Therefore, the significance criteria do not apply to the Project, and there would be no impact.

G. MITIGATION MONITORING AND REPORTING PROGRAM

When making findings, the lead agency must adopt a reporting or monitoring program for the mitigation measures it has adopted or made a condition of project approval to mitigate or avoid significant effects on the environment. The City hereby adopts the MMRP for the Project, included as Attachment C. The mitigation measures identified in the Final EIR and adopted and incorporated into the Project will be monitored pursuant to this program.

H. ALTERNATIVES

Pursuant to CEQA Guidelines Section 15126.6, the EIR examined a range of reasonable alternatives to the Project that would attain most of the basic project objectives but would avoid or substantially lessen the significant adverse impacts. The City has reviewed the impacts associated with each alternative as compared with the Project, and has also considered each alternative's feasibility, considering a range of economic, environmental, social, and legal factors. Overall, the City concluded that the proposed Project would be the environmentally superior alternative because it would detain the most stormwater since it would be located furthest down the watershed and would capture water from various tributaries, the Water Dog Lake subwatershed, and Belmont Creek itself. No other alternative would capture and retain as much water and meet the Project objectives to the same degree.

The following alternatives are evaluated in the EIR:

Alternative 1 (No Project). Under the No Project Alternative, none of the actions described in Chapter 2, including construction and operation of the underground stormwater storage facility, diversion weir, outlet pipe, sediment chamber, bank stabilization measures, or in-stream check structure would occur. Continued flooding along Belmont Creek, particularly downstream of the Project, would continue to occur and could increase in subsequent years if the Project is not implemented.

Alternative 2 (Hidden Canyon Park). Hidden Canyon Park is a City-owned and operated public park located at 2642 Carlmont Drive. The park is approximately 140 acres, and includes a public parking lot and the Elevator Trail. The detention basin would store approximately 4.14 acre-feet of stormwater by replacing an existing 60-inch reinforced concrete pipe and installing an 18-inch outfall pipe and an emergency overflow structure. The 27,300-square-foot underground detention basin would require 9,100 cubic yards of excavation, along with landscaping and surface restoration. Overall, this alternative would reduce peak flow during a 50-year, 3-hour storm event by 37 cubic feet per second (cfs).

Alternative 3 (Norte Dame Belmont High School Softball Field). Notre Dame Belmont High School is a Catholic women's college preparatory high school located at 1540 Ralston Ave. The softball field is located on the high school's campus just outside the Moore Pavilion. The Alternative 3 area is approximately 2.6 acres and contains an existing play court, parking lot, and softball field. The detention basin would store approximately 11.12 acre-feet of stormwater and would include the installation of 24-inch inlet and outlet pipes and an emergency overflow structure. The 102,840-square-foot underground detention basin would require 38,089 cubic

yards of excavation, along with softball field-specific surface improvements. Overall, this alternative would reduce peak flow during a 50-year, 3-hour storm event by 70 cfs.

Alternative 4 (Notre Dame de Namur Soccer Field). Notre Dame de Namur University College is a private Catholic university located at 1500 Ralston Ave. The Koret soccer field is located on the southern corner of the University campus. The Alternative 4 area is approximately 1.7 acres and contains an existing soccer field, bleachers, and fencing. The detention basin would store 8.77 acre feet of stormwater and would involve the installation of 24-inch inlet and outlet pipes and an emergency overflow structure. The 72,000-square-foot underground detention basin would require 26,667 cubic yards of excavation, along with soccer field−specific surface improvements. Overall, this alternative would reduce peak flow during a 50-year, 3-hour storm event by 68 cfs.

Alternative 5 (Carlmont High School Softball Field). Carlmont High School is a public high school managed by the Sequoia Union High School District, and located at 1400 Alameda de Las Pulgas in Belmont. The softball field is in the northern portion of campus, adjacent to a surface parking lot and the performing arts center. The detention basin would store 13.08 acre feet of stormwater and would require the installation of a 36-inch inlet pipe, a 24-inch outlet pipe, and an emergency overflow structure. The 131,574-square-foot underground detention basin would require 38,985 cubic yards of excavation, along with softball field−specific surface improvements. Overall, this alternative would reduce peak flow during a 50-year, 3-hour storm event by 16 cfs.

I. RECIRCULATION NOT REQUIRED

No new or substantial changes to the EIR were proposed as a result of the public comment process. The Final EIR responds to comments and makes only minor technical changes, clarifications or additions to the EIR. The minor changes, clarifications, and additions to the EIR do not identify any new significant impacts or substantial increase in the severity of any environmental impacts. Therefore, recirculation of the EIR is not required.

J. RECORD OF PROCEEDINGS

Various documents and other materials, including the Notice of Preparation (NOP), comments received on the NOP, Notice of Availability (NOA), all other public notices issued by the City in relation to the Project or the EIR, Draft Environmental Impact Report including associated appendices and technical materials cited, Final Environmental Impact Report, Mitigation Monitoring and Reporting Program (MMRP), staff reports associated with Planning Commission and City Council hearings on the Project, minutes and recordings of the discussions regarding the Project at public hearings held by the Planning Commission and City Council, comments and staff responses entered into the record orally and in writing, and those categories of materials identified in Public Resources Code Section 21167.6, constitute the record of proceedings upon which the City base its findings and decisions contained herein. Documents related to this Project are located in the City's offices located at One Twin Pines Lane, Suite 385, Belmont, California 94002 and online at www.belmont.gov/stormwaterbasin.

EXHIBIT B
THE CITY OF BELMONT'S STATEMENT OF OVERRIDING CONSIDERATIONS FOR THE TWIN PINES PARK STORWATER DETENTION BASIN PROJECT

(Public Resources Code, Section 21000, et seq.)

I. Introduction

As set forth in Exhibit A, the City has found that the Project will result in significant adverse environmental impacts related to tribal cultural resources that cannot be avoided following adoption and implementation of feasible mitigation measures described in the EIR, and that specific economic, legal, social, or other considerations make infeasible additional mitigation measures. In addition, there are no feasible project alternatives that would mitigate or avoid all of the Project's significant environmental impacts. Pursuant to Public Resources Code Sections 21002, 21002.1, and 21081, and CEQA Guidelines Section 15093, the City of Belmont City Council finds that, having balanced the economic, legal, social, technological or other benefits of the project, including region-wide or statewide environmental benefits, against its significant and unavoidable environmental impacts, approval of the proposed Project provides benefits that outweigh the Project's unavoidable adverse environmental effects, and that the adverse environmental effects are therefore acceptable. These significant effects are listed below, and the following section identifies the reasons why, in the City's judgment, specific benefits of the Project outweigh the significant and unavoidable effects. The substantial evidence supporting the benefits of the Project can be found in Exhibit A, in the Project itself, and in the record of proceedings as defined in Exhibit A, Section J. The City further finds that each of the Project benefits discussed below is a separate and independent basis for these findings. The reasons set forth below are based on the EIR and other information in the administrative record.

Tribal Cultural Resources

1. *Impact TCR-1: The Project would cause a substantial adverse change in the significance of a tribal cultural resource, as defined in PRC Section 21074.*

2. *Impact C-TCR-1: The Project, in combination with past, and probable future projects in the Project area, would result in significant adverse cumulative tribal cultural resources impacts.*

II. Project Benefits

The Project offers benefits that outweigh the unavoidable adverse environmental effects. The City of Belmont adopts the following Statement of Overriding Considerations. The City of Belmont recognizes that significant and unavoidable impacts would result from implementation of the Project, as discussed above. Having (i) adopted all feasible mitigation measures, (ii) rejected as infeasible additional mitigation measures and alternatives to the proposed Project discussed in Exhibit A, (iii) recognized all significant, unavoidable impacts, and (iv) balanced the benefits of the Project against the Project's significant and unavoidable impacts, the City of Belmont hereby finds that the benefits outweigh and override the significant unavoidable impacts for the reasons stated below.

The below stated reasons summarize benefits, goals, and objectives of the Project. These overriding considerations justify approval of the Project. Each of the Project benefits discussed below is a separate and independent basis for these findings. These benefits include the following:

Increase Flood Protection. To achieve the Project objective of reducing downstream flooding and maximizing flood protection, the Project would reduce the size of the floodplain in Lower Belmont Creek, upstream of the culvert under US 101, from 120.5 acres to 111 acres during a large flood (an event with a 1 percent chance of occurring in any given year). The Project would also reduce the floodplain area during more frequent events. This would minimize disruption and damage to public and private landowners related to flooding.

Reduce Erosion and Prevent Failure of Stream Banks. Concrete retaining walls would be constructed along the northern bank of Belmont Creek at the upstream and downstream ends of the sediment chamber to prevent structure undermining and provide channel stability. Approximately 120 linear feet of bank stabilization consisting of riprap would be placed along the southern bank of Belmont Creek starting near the upstream concrete retaining wall to prevent failure of stream banks.

Reduce Downstream Sedimentation. The Project includes construction of a sediment chamber designed to capture coarse sediment prior to stormflows passing over the weir and into the storage facility. The sediment chamber would be sized to capture approximately 200 cubic yards of course sediment, and would be maintained by removing sediment on an as needed basis.

Improve Water Quality. The Project is designed to provide ancillary water quality benefits through pollutant capture and removal. Stormwater and water quality best management practices such as wattles, silt fence, and other stormwater protection measures would be implemented as required by the Section 401 Water Quality Certification and National Pollutant Discharge Elimination System permit.

III. Summary

The City is obligated by CEQA Guidelines Section 15093 to balance identified project benefits against the unavoidable environmental impacts when determining whether to approve a project. The City finds that the benefits of the Project listed above will outweigh the significant unavoidable tribal cultural resources impacts.

EXHIBIT C

MITIGATION MONITORING AND REPORTING PROGRAM FOR THE CITY OF BELMONT'S TWIN PINES PARK STORMWATER DETENTION BASIN PROJECT (SCH NO. 2023100139)

Mitigation and Monitoring Reporting Program

This document is the Mitigation Monitoring and Reporting Program (MMRP) for the City of Belmont's Twin Pines Park Stormwater Detention Basin Project. CEQA requires that a reporting or monitoring program be adopted for the conditions of project approval that are necessary to mitigate or avoid significant effects on the environment (Public Resources Code 21081.6). This MMRP is designed to ensure compliance with adopted mitigation measures during project implementation. For each mitigation measure recommended in the Final EIR, specifications are made herein that identify the action required and the monitoring that must occur.

In addition to ensuring implementation of mitigation measures, the MMRP provides feedback to agency staff and decision-makers during project implementation and identifies the need for enforcement action before irreversible environmental damage occurs. This MMRP will be used by City staff or the City's consultant to determine compliance with permit conditions.

The following table identifies each mitigation measure included in the EIR, the action required for the measure to be implemented, the time at which the monitoring is to occur, the monitoring frequency, and the agency or party responsible for ensuring that the monitoring is performed. In addition, the table includes columns for compliance verification. These columns will be filled out by the monitoring agency or party and would document monitoring compliance. Where an impact was identified to be less than significant, no mitigation measures were required.

TABLE C-1
MITIGATION MONITORING AND REPORTING PROGRAM FOR THE TWIN PINES PARK STORMWATER DETENTION BASIN PROJECT

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Air Quality and Greenhouse Gas Emissions		
Mitigation Measure AIR-1: Implement BAAQMD's Basic and Enhanced Best Management Practices for Construction-Related Fugitive Dust Emissions[1] During Project construction, the construction contractor shall reduce construction-related fugitive dust (PM_{10} and $PM_{2.5}$) by implementing BAAQMD's basic best management practices for construction-related fugitive dust emissions at all construction and staging areas. The following measures are based on BAAQMD's 2022 CEQA guidelines. The construction contractor shall comply with the following: • All exposed surfaces (e.g., parking areas, staging areas, soil piles, graded areas, and unpaved access roads) shall be watered two times per day. • All haul trucks transporting soil, sand, or other loose material offsite shall be covered. • All visible mud or dirt track-out onto adjacent public roads shall be removed using wet power vacuum street sweepers at least once per day. The use of dry power sweeping shall be prohibited. • All vehicle speeds on unpaved roads, driveways, or driving surfaces shall be limited to 15 mph. • All roadways, driveways, and sidewalks to be paved shall be completed as soon as possible. Building pads shall be laid as soon as possible after grading unless seeding or soil binders are used. • All excavation, grading, and/or demolition activities shall be suspended when average wind speeds exceed 20 mph. • All trucks and equipment, including their tires, shall be washed off prior to leaving the site. • Unpaved roads providing access to sites located 100 feet or further from a paved road shall be treated with a 6- to 12-inch layer of compacted wood chips, mulch, or gravel. • Publicly visible signs shall be posted with the telephone number and name of the person to contact at the lead agency regarding dust complaints. This person shall respond and take corrective action within 48 hours. The BAAQMD's General Air Pollution Complaints number shall also be visible to ensure compliance with applicable regulations. • Limit the simultaneous occurrence of excavation, grading, and ground-disturbing construction activities. • Install wind breaks (e.g., trees, fences) on the windward side(s) of actively disturbed areas of construction. Wind breaks should have at maximum 50 percent air porosity. • Plant vegetative ground cover (e.g., fast-germinating native grass seed) in disturbed areas as soon as possible and watered appropriately until vegetation is established. • Install sandbags or other erosion control measures to prevent silt runoff to public roadways from sites with a slope greater than one percent. • Minimize the amount of excavated material or waste materials stored at the site. • Hydroseed or apply non-toxic soil stabilizers to construction areas, including previously graded areas, that are inactive for at least 10 calendar days.	Construction Contractor	Construction

[1] BAAQMD = Bay Area Air Quality Management District

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure AIR-2: Require Tier 4 Engines on Construction Equipment The construction contractor shall be required, as a condition of contract, to further reduce construction-related exhaust emissions by ensuring that all off-road equipment operating for more than 20 total hours over the entire duration of construction activities shall operate on U.S. Environmental Protection Agency (EPA)-approved Tier 4 Final or newer engines. Exemptions can be made for specialized equipment where Tier 4 engines are not commercially available within 200 miles of the Project site. The construction contract must identify these pieces of equipment, document their unavailability, and ensure that they operate on no less than an EPA-approved Tier 3 engine. CARB regulations will result in an increasing percentage of Tier 4 engines in the construction equipment fleet over the next several years.	Construction Contractor	Construction
Biological Resources		
Mitigation Measure BIO-1: Worker Awareness Environmental Training Prior to construction, a qualified biologist shall provide worker awareness environmental training to inform construction personnel about protected biological resources, including special-status species, their habitat, legal protections, and wetlands and waters of the U.S. and/or State. The training shall include photos of special-status species to aid in identification, the qualified biologist's contact information, and the City's point of contact. All construction personnel must undergo this training prior to working on the Project and a sign-in sheet shall be maintained to keep a record of those trained.	Qualified Biologist	Pre-Construction and Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure BIO-2: Pre-Construction Survey for Special Status Plants A qualified biologist shall conduct appropriately timed bloom surveys to identify any special-status plant species (bent-flowered fiddleneck and western leatherwood) that may occur within the Project site. The optimal identification window for bent-flowered fiddleneck is March through June while the window for western leatherwood is November through March (perennial and identifiable year-round). If a special-status plant is observed during the survey, a 10-foot buffer shall be placed around the plant for the construction contractor to avoid during construction. The biologist shall prepare a report of the special-status plant species survey and provide it to the Project lead engineer at the City. If impacts to special-status plant species cannot be avoided, a restoration and mitigation plan would be prepared to provide plant salvage and relocation consistent with California Department of Fish and Wildlife (CDFW) guidance. At a minimum, the plan shall include collection of reproductive structures from affected plants, a full description of microhabitat conditions necessary, seed germination requirements, assessments of potential transplant and enhancement sites, success and performance criteria, and monitoring programs, as well as measures to ensure long-term sustainability. The following considerations shall be met: a. Prior to unavoidable and permanent disturbance to a population of a special-status plant species, propagules shall be collected from the population to be disturbed. This may include seed collection or cuttings, and these propagules shall be used to establish a new population in or near the Project site. Transplantation may be attempted but shall not be used as the primary means of plant salvage and new population creation, because for many local rare plant species, seeding may provide a better option to establish annual species. Irrigation shall be provided as necessary to ensure survival of new plantings. b. A minimum 5-year monitoring plan with adaptive management shall be implemented to document the success of new plant populations. Adequate assurances shall be provided to ensure long-term protection and management of lands to promote established rare plant populations. Success criteria for seeded or transplanted populations shall include at least 75 percent survival of salvaged or relocated plants after 5 years, a similar number of new plants (by area and numbers) to the impacted population, and minimal presence of invasive weeds at planting locations.	Qualified Biologist	Pre-Construction and five years Post-Construction
Mitigation Measure BIO-3: Wildlife Exclusion Fencing To prevent special-status species from entering the work area, the construction contractor shall install a multi-purpose protective barrier (such as silt fencing) at the upstream and downstream boundaries of the Project work site adjacent to suitable wildlife habitat. If special-status species are found during pre-construction surveys, a qualified biologist shall oversee the fence installation. The fence shall be a minimum of 3 feet above ground surface with an additional 4 to 6 inches of fence material buried such that species cannot crawl under the fence. If a portion of the fence cannot be buried, it shall be continuously weighed down with sand or gravel bags. Fence installation shall occur within one day of any protected species relocation or within three days of pre-construction survey where protected species are determined to be absent, whichever occurs first. No equipment mobilization, grading, clearing, or storage of equipment or machinery, or similar activity shall occur at the Project site until a qualified biologist has inspected and approved the wildlife exclusion fencing; and The City of Belmont shall ensure that the fencing is continuously maintained until all construction is complete.	Qualified Biologist, Construction Contractor, and the City of Belmont	Pre-Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure BIO-4: Pre-Construction Surveys for Special-status Bats Prior to any tree removal and the start of any construction activities expected to commence during the breeding season for special-status bat species (April 15 to August 31) or the winter torpor period (October 15 to February 28), a qualified biologist shall conduct a pre-construction survey to determine whether active roosts are present on site or within 100 feet of the Project work site. Areas adjacent to the Project site that are inaccessible due to private property restrictions shall be surveyed using binoculars from the nearest vantage point. If no roosting bats are found, then no further mitigation is required and the biologist shall submit a letter report to the City summarizing the survey results. If at any time during the roosting season construction stops for a period of two weeks or longer, pre-construction surveys shall be conducted prior to resuming construction. If roosting bats are found, the construction contractor shall avoid construction within 100 feet of the roost until breeding season or winter torpor is complete and a qualified biologist confirms bats are absent.	Construction Contractor, Qualified Biologist, and the City of Belmont	Pre-Construction and Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure BIO-5: Pre-Construction/Activity Surveys for Common Nesting Birds If construction or operational (e.g., active maintenance) activities begin during the avian nesting season (February 1 to September 15), a qualified biologist shall be retained by the City to conduct a pre-construction/activity survey for active nests in suitable nesting habitat within 500 feet of the construction and/or operation limits for nesting raptors and migratory birds. Areas adjacent to the work area that are inaccessible due to private property restrictions shall be surveyed using binoculars from the nearest vantage point. The survey shall be conducted by a qualified biologist no more than seven days prior to the onset of construction or operational activity. If no active nests are identified during the pre-construction/activity survey, no further mitigation is necessary. If construction or operational activities begin prior to February 1, it is assumed that no birds would nest in the Project construction or operation area during active construction/operational activities and no pre-construction/activity surveys are required. If at any time during the nesting season construction or operational activities stop for a period of two weeks or longer, pre-construction/activity surveys shall be conducted prior to construction or operational activities resuming. If active nests are found during the survey, the City shall implement active nest protection measures to ensure that the nests would not be adversely affected, which would include establishing a no-work buffer zone around the active nest. Active nest protection measures shall include, but not be limited to: If active nests are found on or within 500 feet of the Project construction or operation limits, then the qualified biologist shall establish no-disturbance buffers for active nests of 250 feet for migratory non-raptor species and 500 feet for raptor species until the breeding season has ended or until a qualified biologist has determined that the birds have fledged and are no longer reliant upon the nest or parental care for survival. Depending on conditions specific to each nest, and the relative location to proposed construction or operational activities, it may be feasible for construction or operational activities to occur as planned within the buffer without impacting the breeding/nesting effort. In this case (to be determined on a case-by-case basis), the nest(s) shall be monitored by a qualified biologist during any construction or operational activities within the buffer. If, in the professional opinion of the monitor, the Project would impact the nesting birds or young, the biologist shall immediately inform the construction or maintenance manager and the City, who shall stop construction or operational activities within the buffer until the nest is no longer active or a new buffer distance is agreed upon based on the biologist's recommendations. Completion of nesting and fledging activities shall be determined by the qualified biologist. If construction or operational activities begins outside of the breeding season (February 1 through September 15), then the City is permitted to continue construction or operational activities throughout the breeding season.	Qualified Biologist and the City of Belmont	Pre-Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure BIO-6: Compensation of Affected Riparian Habitat The City shall retain a qualified botanist, biologist, restoration ecologist, or landscape architect to develop a riparian habitat mitigation and monitoring plan. At a minimum, the City shall compensate impacted riparian areas at a ratio no less than 3:1 (compensation area to impact area) per CDFW policy. Compensation may occur in the form of on- or off-site (along adjacent reaches of Belmont Creek) restoration or enhancement by planting riparian vegetation and subsequent monitoring to ensure success is ultimately achieved. Monitoring shall occur for at least 5 years over the course of a 10-year timeline. The final mitigation ratio shall be determined in consultation with CDFW during the process of obtaining the necessary regulatory permits. At a minimum, success criteria shall include 75% coverage by native riparian species and 70% survival of restoration/enhancement plantings as compared to reference sites nearby by the end of the total 10-year timeline. Once the final mitigation ratio is determined and the mitigation and monitoring plan finalized through consultation between the City and CDFW, the City shall implement riparian restoration and enhancement within one year of Project-related impacts. The City shall retain a qualified botanist, biologist, restoration ecologist, or landscape architect to conduct routine monitoring per the mitigation and monitoring plan and evaluate its success. If success is achieved at the end of the monitoring period, no further action is necessary.	Qualified Biologist and the City of Belmont	Pre-Construction and 10 years Post-Construction
Mitigation Measure BIO-7: No Net Loss of Waters of U.S. and/or State The City shall retain a qualified hydrologist, landscape architect, or biologist to develop a wetland mitigation and monitoring plan as a part of the permitting process, which shall include enhancement of Belmont Creek upstream of the Project site to improve physical conditions and stability, monitoring success criteria, annual monitoring intervals and duration (for at least 3 years), and adaptive management options. Mitigation may occur in the form of restoration, enhancement, or creation and shall be implemented within one year of Project-related impacts on waters of the U.S. and/or State to avoid temporal loss of wetland and other water functions and values. The exact mitigation ratio shall be determined in consultation with the applicable permitting agencies, which may include U.S. Army Corps of Engineers (USACE), CDFW, and/or the Regional Water Quality Control Board (RWQCB). At a minimum, the City shall compensate permanently impacted waters at a ratio no less than 1:1 per USACE and State no net loss policy.	Qualified Hydrologist, landscape architect, or biologist, and the City of Belmont	Pre-Construction and three years Post-Construction
Cultural Resources and Tribal Cultural Resources		
Mitigation Measure CUL-1: Development and Implementation of an Archaeological Resources Data Recovery and Treatment Plan A qualified archaeologist, defined as one meeting the Secretary of the Interior's Professional Qualifications Standards for Archeology and with experience in California archaeology, in coordination with the Muwekma Ohlone Tribe of the San Francisco Bay Area (Muwekma) and the City, shall prepare and implement an Archaeological Resources Data Recovery and Treatment Plan (ARDRTP) for the Project and, specifically, P-41-000152. The ARDRTP shall be approved by the City at least 60 days prior to Project construction. The ARDRTP shall be heavily based on Muwekma's most likely descendent (MLD) treatment recommendations and shall include and require the following: • **Research Design:** The ARDRTP shall outline the applicable cultural context for P-41-000152, within a regional context, identify research goals and questions that are applicable to P-41-000152, and list the data needs (types, quantities, quality) required to answer each research question. The research design shall address all four California Register Criteria (1 to 4) and identify the methods that will be required to inform treatment, such as subsurface investigation, documentary/archival research, and/or oral history.	Qualified Archaeologist, in coordination with the Muwekma, and the City of Belmont	Pre-Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
• **Data Recovery Plan:** The ARDRTP shall outline the field and laboratory methods to be employed, and any specialized studies that will be conducted, as part of the data recovery effort. These methods will likely include controlled volume archaeological excavations and artifact/feature analyses. The latter will be dependent on the specific archaeological material encountered but will likely include osteological analyses, faunal analyses, flaked-stone and ground-stone analyses, and radiocarbon dating, among others. • **Protocols for Native American Monitoring and Input:** The ARDRTP shall outline the role and responsibilities of Native American Tribal representatives. It shall include communication protocols and an opportunity and timelines for review of the ARDRR. The ARDRTP shall include provisions for full-time Native American monitoring during field work (see Mitigation Measure CUL-2). • **Cultural Resources Monitoring Plan:** The Cultural Resources Monitoring Plan shall outline the archaeological and Native American monitors responsibilities and requirements, communications protocol, treatment protocol, and reporting requirements (see Mitigation Measure CUL-2). • **Security Measures:** The ARDRTP shall include recommended security measures to protect P-41-000152 from vandalism, looting, and non-intentionally damaging activities during field work. • **Procedures for Treatment of Human Remains and Associated Funerary Objects:** The ARDRTP shall outline the protocols and procedures to be followed for treatment of human remains and associated funerary objects. These shall include stop-work and protective measures, notification protocols, and compliance with HSC Section 7050.5, PRC Section 5097.98. • **Curation Requirements:** The ARDRTP shall stipulate the protocol and specifics for curation of archaeological materials. Disposition of Native American archaeological materials and human remains shall be determined through consultation between the qualified archaeologist, Muwekma, and the City. Any significant non-indigenous archaeological materials shall be curated at a repository accredited by the American Association of Museums that meets the standards outlined in Code of Federal Regulations Title 36 Section 79.9. If no accredited repository accepts the collection, then it may be curated at a non-accredited repository as long as it meets the minimum standards set forth by 36 Code of Federal Regulations Section 79.9. If neither an accredited nor a non-accredited repository accepts the collection, then it may be offered to a public, non-profit institution with a research interest in the materials, or donated to a local school or historical society in the area for educational purposes, to be determined by the qualified archaeologist in consultation with Muwekma and the City. • **Reporting Requirements:** Upon completion of data recovery for P-41-000152, the qualified archaeologist shall document the findings in an Archaeological Resources Data Recovery Report (ARDRR), whose development shall include participation and approval by Muwekma. The draft ARDRR shall be submitted to the City within 360 calendar days after completion of the data recovery, including laboratory analysis, and the final ARDRR shall be submitted to the City within 60 days after the receipt of City comments. The ARDRR shall meet the Secretary of the Interior's Standards for archaeological technical reporting and shall be submitted to the Northwest Information Center upon approval by the City unless the document contains information that any California Native American Tribes involved in its development determine should not be filed with the Northwest Information Center, in which case the report shall be submitted to the California Native American Heritage Commission.		
Mitigation Measure CUL-2: Development and Implementation of a Cultural Resources Monitoring Plan A qualified archaeologist, defined as one meeting the Secretary of the Interior's Professional Qualifications Standards for Archeology and with experience in California archaeology, in coordination with the Muwekma Ohlone Tribe of the San Francisco Bay Area (Muwekma) and the City, shall prepare and implement a Cultural Resources Monitoring Plan (CRMP) based on the final approved Project design. The CRMP shall be a component of the Archaeological Resources Data Recovery and Treatment Plan (see	Qualified Archaeologist, in coordination with the Muwekma, and the City of Belmont	Pre-Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure CUL-1), which shall be approved by the City at least 60 days prior to Project construction. The CRMP shall include: • **Provisions for Archaeological Monitoring:** The CRMP shall outline the archaeological monitor(s) responsibilities and requirements. • **Provisions for Native American Monitoring and Input:** The CRMP shall outline the Native American monitor(s) responsibilities and requirements. The CRMP shall include provisions for full-time Native American monitoring during field work (see Mitigation Measure CUL-1). • **Procedures for Discovery of Archaeological Resources:** Procedures to be implemented in the event of an archaeological discovery (outside of data recovery; see Mitigation Measure CUL-1) shall be fully defined in the CRMP, and shall include stop-work and protective measures, notification protocols, procedures for significance assessments, and appropriate treatment measures. • **Procedures for Discovery of Human Remains and Associated Funerary Objects:** The CRMP shall outline the protocols and procedures to be followed in the event that human remains and associated funerary objects are encountered during construction (outside of data recovery; see Mitigation Measure CUL-1). These shall include stop-work and protective measures, notification protocols, and compliance with California Health and Safety Code Section 7050.5 and PRC Section 5097.98. • **Curation Requirements:** The CRMP shall stipulate the protocol and specifics for curation of archaeological materials in accordance with the ARDRTP (see Mitigation Measure CUL-1). • **Reporting Requirements:** Upon completion of cultural resources monitoring, the qualified archaeologist shall document the findings in a Cultural Resources Monitoring Report (CRMR), whose development shall include participation and approval by Muwekma. The draft CRMR shall be submitted to the City within 360 calendar days after completion of the construction monitoring, and the final CRMR shall be submitted to the City within 60 days after the receipt of City comments. The CRMR shall meet the Secretary of the Interior's Standards for archaeological technical reporting and shall be submitted to the Northwest Information Center upon approval by the City unless the document contains information that any California Native American Tribes involved in its development determine should not be filed with the Northwest Information Center, in which case the report shall be submitted to the California Native American Heritage Commission.		
Mitigation Measure CUL-3: Development and Implementation of a Cultural Resources Awareness and Sensitivity Training Program A qualified archaeologist, defined as one meeting the Secretary of the Interior's Professional Qualifications Standards for Archeology and with experience in California archaeology, in coordination with the Muwekma Ohlone Tribe of the San Francisco Bay Area and the City, shall prepare and implement a Cultural Resources Awareness and Sensitivity Training Program (Program) for all construction and field workers involved in Project ground-disturbing activities. The Program shall include a presentation that covers, at a minimum, the types of cultural resources common to the area, regulatory protections for cultural resources, and the protocol for unanticipated discovery of archaeological resources and human remains (see Mitigation Measures CUL-1 and CUL-2). Personnel working in areas of Project ground-disturbing activities shall receive the training prior to working in these areas. Written materials associated with the Program shall be provided to Project personnel as appropriate. Documentation of the training attendance shall be maintained by the City.	Qualified Archaeologist, in coordination with the Muwekma, and the City of Belmont	Pre-Construction and Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure CUL-4: Development and Installation of Public Informational Signage A qualified archaeologist, defined as one meeting the Secretary of the Interior's Professional Qualifications Standards for Archeology and with experience in California archaeology, in coordination with the Muwekma Ohlone Tribe of the San Francisco Bay Area and the City, shall develop public informational signage with respect to P-41-000152 that shall: further educate the general public about the history and heritage of the California Native American Tribes cultural and geographically associated with the Project area; provide information about the ancestral San Francisco Bay Ohlone–speaking tribal groups that were brought under the sphere of influence of Missions San Francisco, Santa Clara, and San Jose; emphasize the ensuing adverse impacts to California Native Americans through the colonial eras of Spanish and American conquests and destruction; provide non-confidential information obtained through archaeological data recovery of P-41-000152 (see Mitigation Measure CUL-1); and provide a name for P-41-000152 in an Ohlone language. The City shall install, in coordination with the Muwekma and other California Native American Tribes, the signage at or near the Project area, if feasible.	Qualified Archaeologist, in coordination with the Muwekma, and the City of Belmont	Post-Construction
Geology and Soils		
Mitigation Measure GEO-1: Paleontological Monitoring a. **Project Paleontologist**: The City shall retain a qualified professional paleontologist (qualified paleontologist) meeting the Society of Vertebrate Paleontology (SVP) standards as set forth in the "Definitions" section of Standard Procedures for the Assessment and Mitigation of Adverse Impacts to Paleontological Resources prior to demolition or grading. The qualified paleontologist shall attend the Project kick-off meeting and Project progress meetings on a regular basis, shall report to the site in the event potential paleontological resources are encountered, and shall implement the outlined duties. b. **Worker Training**: Prior to the start of any ground-disturbing activity, the qualified paleontologist shall prepare paleontological resources sensitivity training materials for use during project-wide Worker Environmental Awareness Training (or equivalent). The paleontological resources sensitivity training shall be conducted by a qualified environmental trainer working under the supervision of the qualified paleontologist. In the event construction crews are phased in, additional trainings shall be conducted for new construction personnel. The training session shall focus on the recognition of the types of paleontological resources that could be encountered within the Project site and the procedures to be followed if they are found, as outlined in an approved Paleontological Resources Monitoring and Mitigation Plan (discussed below). The City shall retain documentation demonstrating that all construction personnel attended the training prior to the start of work on the site. c. **Paleontological Resources Discovery and Monitoring**: The qualified paleontologist shall prepare a Paleontological Resources Monitoring and Mitigation Plan applicable to excavation deeper than 7 feet below ground surface. The City shall review and approve the plan at least 30 days prior to the start of construction. This plan shall address specifics of monitoring and mitigation and comply with the recommendations of the SVP, as follows: i. The Paleontological Resources Monitoring and Mitigation Plan shall clearly map portions of the Project which will excavate below 7 feet below ground surface in previously undisturbed sediments within the Project site that have high paleontological sensitivity, based on final Project design. ii. The qualified paleontologist shall establish in the Plan the type of paleontological resources monitoring for ground-disturbing activities which will excavate below 7 feet below ground surface, based on site observations, subsurface stratigraphy, or other factors. Monitoring shall be conducted either by trained workers or by qualified paleontological	Professional Paleontologist and the City of Belmont	Pre-Construction and Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
resource monitors meeting the SVP standards. If necessary, the qualified paleontologist shall identify and retain qualified paleontological resource monitors (qualified monitors) meeting the SVP standards. iii. Monitoring under the direction of the qualified paleontologist shall be conducted for all ground-disturbing activities which will excavate below 7 feet below ground surface in previously undisturbed sediments within the Project site that have high paleontological sensitivity, or as otherwise specified in the Plan. iv. The qualified paleontologist (based on site observations, subsurface stratigraphy, or other factors) may reduce or discontinue monitoring, as warranted, if they determine that the possibility of encountering significant paleontological resources is low. v. If many pieces of heavy equipment are in use simultaneously but at diverse locations, each location will need to be individually monitored, if recommended by the qualified paleontologist. vi. Monitors shall have the authority to temporarily halt or divert work away from exposed fossils to evaluate and recover the fossil specimens, establishing a 50-foot buffer around fossils. vii. If construction or other personnel discover any potential fossils during construction, regardless of the depth of work or location and regardless of whether the site is being monitored, work at the discovery location shall cease in a 50-foot radius of the discovery until the qualified paleontologist has assessed the discovery and made recommendations as to the appropriate treatment. viii. The qualified paleontologist shall determine the significance of any fossils discovered and shall determine the appropriate treatment for significant fossils in accordance with the SVP standards. ix. Monitors shall prepare daily logs detailing the types of activities and soils observed as well as any discoveries. The qualified paleontologist shall prepare a final monitoring and mitigation report to document the results of the monitoring effort and any curation of fossils and shall submit this report to the City for their records. d. **Significant Fossil Treatment.** If any find is deemed significant, as defined in the SVP standards, the qualified paleontologist shall salvage and prepare the fossil for permanent curation with a certified repository with retrievable storage following the SVP standards. The city shall retain a repository receipt from the curation facility.		
Hydrology and Water Quality		
Mitigation Measure HYD-1: In-Water Construction Measures To the extent feasible, work below top of bank in Belmont Creek shall be completed during the dry season and when the channel is dry or contains little water. If construction activities must occur in the wetted channel of Belmont Creek, the City shall develop an in-water construction plan consisting of measures that reduce or avoid the release of pollutants into Belmont Creek. The City shall implement the in-water construction plan for the duration of construction activities in Belmont Creek. The in-water construction plan shall include, but not be limited to, the following types of measures: • *In-Water Concrete Use Measures.* Where possible, poured concrete shall be excluded from contact with surface or groundwater during initial curing. During that time, runoff from the concrete shall not be allowed to enter surface or groundwater. If this is not feasible, commercial sealants that are non-toxic to aquatic life shall be applied before poured concrete comes into contact with flowing water.	City of Belmont	Pre-Construction and Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
• *Cofferdam Construction Measures.* Construction of cofferdams shall begin in the upstream area and continue in a downstream direction, allowing water to drain from the area being isolated by the cofferdam, prior to closure. Cofferdams and stream diversion systems shall remain in place and be fully functional throughout the construction period. Stream diversions shall be limited to the shortest duration necessary to complete in-water work. In-water cofferdams shall be built in a manner that minimizes siltation and/or turbidity. Where possible, cofferdams shall be pushed into place. When appropriate, cofferdams shall be removed so surface elevations of water impounded above the cofferdam shall not be reduced at a rate greater than one inch per hour. All dewatering/diversion facilities shall be installed such that natural flow is maintained upstream and downstream of Project areas. • *Dewatering Plan.* If dewatering is required to create a dry work area, the area to be dewatered shall encompass the minimum area and be in place for the minimum amount of time necessary to perform construction activities. The City shall prepare a dewatering plan with a description of the proposed dewatering structures, and appropriate types of best management practices for the installation, operation, maintenance, and removal of those structures. The best management practices shall be selected to allow water to flow through or around the dewatered area while avoiding increased stream velocity and preventing scour or turbidity during dewatering and bypass. Water pumped or removed from dewatered areas shall be conveyed in a manner that does not contribute turbidity to nearby receiving waters. If dewatering pumps are required, pumps shall be refueled in an area well away from the stream channel. SECTION 1. Upon completion of construction activities, any diversions or barriers to flow shall be removed in a manner that will allow flow to resume with the least disturbance to the channel bed and banks to avoid creating turbidity. • *In-Water Pile Driving Measures.* If in-water pile driving is required, caissons or a continuous length of silt curtain shall be implemented surrounding the pile driving area to provide sediment containment and avoid the release of turbid water during pile driving. The silt curtain will restrict the surface visible turbidity plume to the area of pile construction and will control and contain the migration of re-suspended sediments at the water surface and at depth. • *Bank Stabilization Materials Placement Measures.* Material used for bank stabilization or in-water restoration shall minimize discharges of sediment or other forms of waste. Equipment shall not operate in standing or flowing waters. All materials placed in Belmont Creek shall be nontoxic.		

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure HYD-2: Geomorphic Monitoring and Adaptive Management Plan Prior to Project construction, the City shall develop a geomorphic monitoring and adaptive management plan, which shall specify an approach to monitoring Belmont Creek for accelerated channel erosion between the outlet of the sediment chamber and the culvert at 6th Avenue and O'Neill Street. The City shall complete baseline monitoring, as part of the geomorphic monitoring and adaptive management plan, prior to Project construction. Upon Project completion the City shall implement monitoring consistent with the geomorphic monitoring and adaptive management plan. If monitoring identifies accelerated channel erosion, at the end of the dry season the City shall place a portion of removed sediment from the sediment chamber on the toe of the creek bank at the downstream edge of the Project area near the outlet pipe to passively augment sediment in the downstream reach. The City shall conduct a sediment study to estimate the amount of sediment that should be placed to provide sufficient passive augmentation. The City shall monitor the placed sediment and downstream reach to assess whether sediment placement has reduced channel erosion to rates similar to current conditions. If sediment placement has not reduced the channel erosion attributable to the Project, additional sediment placement would be required. The City shall review the geomorphic monitoring and adaptive management plan annually to ensure it has been implemented or revised appropriately. After three consecutive years without sediment augmentation during which channel erosion rates in the downstream reach are similar to pre-Project conditions, the City shall no longer monitor the downstream reach for Project-related erosion.	City of Belmont	Pre-Construction, Construction, and Operations and Maintenance
Noise		
Mitigation Measure NOI-1: Construction Noise Reduction Measures. The construction contractor shall implement the following noise reduction measures to reduce the impact of temporary construction-related noise on sensitive receptors: 1. Require construction equipment and trucks used for project construction to utilize the best available noise control techniques (including mufflers, use of intake silencers, ducts, engine enclosures and acoustically attenuating shields or shrouds). 2. Turn off construction equipment when not in use. 3. Locate stationary equipment, construction staging areas, and construction material areas as far from sensitive receptors as possible. 4. Require any impact equipment (e.g., jack hammers, pavement breakers, etc.) used for project construction be hydraulically or electrical powered wherever feasible to avoid noise associated with compressed air exhaust from pneumatically powered tools. Where use of pneumatically powered tools is unavoidable, the use of an exhaust muffler on the compressed air exhaust is recommended to lower noise levels from the exhaust by up to about 10 dBA. When feasible, external jackets on the impact equipment should also be incorporated to achieve a further reduction of 5 dBA. In the event that external jackets on impact equipment are not feasible, other best management practices shall be employed to reduce noise by 5 dBA. Whenever feasible, require the use of quieter procedures. 5. When construction takes place within 100 feet of sensitive receptors, use specific techniques such as, but not limited to, restrictions on construction timing, use of sound blankets on construction equipment, and the use of temporary walls and noise barriers to block and deflect noise.	Construction Contractor	Construction

Mitigation Measure	Implementing Actions/ Responsible Party	Timing
Mitigation Measure NOI-2: Vibration Avoidance from Compaction The construction contractor shall implement the following noise reduction measures to reduce the impact of temporary construction-related noise on nearby receptors: 1. Use non-vibratory, excavator-mounted compaction wheels and small, smooth drum rollers for final compaction of asphalt base and asphalt concrete, if within 50 feet of a historic structure or 15 feet of a conventionally constructed structure. If needed to meet compaction requirements, smaller vibratory rollers shall be used to minimize vibration levels during repaving activities where needed to meet vibration standards. 2. Avoid using vibratory rollers and clam shovel drops within 15 feet of buildings of conventional construction. 3. Construction methods shall be modified, or alternative construction methods shall be identified, and designed to reduce vibration levels below the limits of 0.5 PPV in/sec for modern structures.	Construction Contractor	Construction

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Stacey Stevenson, Interim Assistant City Manager – Special Projects, sstevenson@belmont.gov
Agenda Title:	First Amendment to Employment Agreement between the City of Belmont and City Attorney Scott M. Rennie
Agenda Action:	Resolution

Recommendation

Adopt a resolution establishing compensation for the City Attorney; and authorizing the Mayor to execute Amendment No. 1 to the City Attorney employment agreement.

Strategic Focus Area

Fiscal and Organizational Sustainability

Background

On September 13, 2011, the City Council of the City of Belmont unanimously adopted Resolution 10417, appointing Scott M. Rennie to the position of City Attorney. The Council-approved employment agreement governing the terms of Mr. Rennie's appointment was effectuated as of October 3, 2011. To date, there have been a total of four amendments to the agreement. The employment agreement was amended on April 14, 2015 (Resolution 2015-048), April 25, 2017 (Resolution 2017-040), November 27, 2018 (Resolution 2018-082), and May 14, 2019 (Resolution 2019-045).

On November 9, 2022, Resolution 2022-105 approved a restated agreement between the City and Mr. Rennie, amending the terms of compensation and benefits. The restated agreement created consistency with the City's current format and language, and with current City practice and State law. Terms of the amended agreement include adjustments to base pay to $274,728, retroactive to the first full pay period in October 2021; and 3% increases effective the first full pay period in October 2022 and October 2023. Other changes included an increase in automobile allowance from $400 to $550 and adjustments to leave accruals.

In or around October 2023, upon conducting Mr. Rennie's performance evaluation, the City Council selected a sub-committee, comprised of Councilmembers Davina Hurt and Robin Pang-Maganaris to review and make a compensation recommendation based on performance, cost of living, and market position. The subcommittee was also granted the authority to meet and negotiate with Mr. Rennie. Having considered a market survey and performance, and having met with Mr. Rennie, the sub-committee reported to the full Council in Closed Session on July 23, 2024, regarding the status of their work and received direction to bring the matter to Open Session for discussion and consideration in a manner consistent with the provisions of Government Code Section 54953(c)(3).

Analysis

Under the terms of the current restated agreement, Mr. Rennie receives base compensation in the amount of $291,459 annually. Consistent with the direction of the full Council, the sub-committee directed staff to conduct a market survey, finding the City Attorney position for the City of Belmont to be below the market mean salary of $299,545. Staff also provided data showing that the twelve-month Urban Consumer Price Index (CPI-U) increased by 2.9% in June 2023 and 3.2% in June 2024. Having considered the market and the cost of living, the Council sub-committee recommends an increase retroactive to October 2023 and an additional increase in October 2024.

The proposed first amendment to the employment agreement between the City of Belmont and Scott M. Rennie increases the City Attorney's base pay follows:

- A base pay of $300,203 retroactively effective the first full pay period in October 2023; and
- A base pay of $309,209 effective the first full pay period in October 2024

All other terms and conditions remain unchanged.

Alternatives

1. Direct the City Council sub-committee to continue negotiations.
2. Take no action

Attachments

A. Resolution
B. Proposed Amendment No. 1 to City Attorney Employment Agreement
C. Restated City Attorney Employment Agreement

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed:	A supplemental budget appropriation for the City Attorney Department is necessary and will be incorporated into the mid-year budget review for the current fiscal year, if approved. Associated salary and benefits for the City Attorney will be incorporated into next year's budget development and long-term financial plan.

Source:	**Purpose:**	**Public Outreach:**
Council	Discretionary Action	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT ESTABLISHING COMPENSATION FOR THE CITY ATTORNEY AND AUTHORIZING THE MAYOR TO EXECUTE AMENDMENT NO. 1 TO THE CITY ATTORNEY EMPLOYMENT AGREEMENT

WHEREAS, on September 13, 2011, the City Council of the City of Belmont unanimously adopted Resolution 10417, appointing Scott M. Rennie to the position of City Attorney, and an employment agreement governing the terms of Mr. Rennie's appointment was effectuated as of October 3, 2011; and,

WHEREAS, the employment agreement has been amended four times, on April 14, 2015 (Resolution 2015-048), April 25, 2017 (Resolution 2017-040), November 27, 2018 (Resolution 2018-082), and May 14, 2019 (Resolution 2019-045) and,

WHEREAS, on November 9, 2022, the City Council adopted Resolution 2022-105, approving a restated agreement with Mr. Rennie, which included adjustments to base pay, automobile allowance, and leave accruals; and.

WHEREAS, in or around October 2023, the City Council conducted Mr. Rennie's performance evaluation and selected a sub-committee, to review and make a compensation recommendation based on performance, cost of living, and market position, and to meet and negotiate with Mr. Rennie; and,

WHEREAS, the sub-committee reported their findings to the full City Council in Closed Session on July 23, 2024, and received direction to bring the proposed amendment to the City Attorney Employment Agreement to Open Session for discussion and consideration; and,

WHEREAS, the market survey showed that the City Attorney's base compensation for Belmont was below the market mean salary of $299,545, and the Urban Consumer Price Index (CPI-U) increased by 2.9% in June 2023 and 3.2% in June 2024; and,

WHEREAS, the sub-committee recommends an increase in base pay for Mr. Rennie, effective October 2023 and October 2024, to better align with the market and cost of living adjustments.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. The Council approves Amendment No. 1 to the City Attorney Employment Agreement to implement the compensation adjustments as outlined in attached Exhibit A; and authorizes the Mayor to execute the amendment.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:

Absent:

Abstain:

ATTEST:

_____
City Clerk

_____
Mayor

APPROVED AS TO FORM:

_____
City Attorney

First Amendment to the Employment Agreement between the City of Belmont and Scott M. Rennie (City Attorney)

This Employment Agreement ("Agreement") is entered into by the City of Belmont, a municipal corporation (hereinafter "City" or "Employer"), and Scott M. Rennie, ("Employee"). City and Employee may be collectively referred to herein as the "Parties."

Recitals

A. On September 10, 2024, the City Council approved the Agreement between the Parties. This Agreement provides for the wages of Employee in the position of City Attorney.

B. The Parties desire to amend the Agreement to revise the terms of the Employment Agreement.

Terms of First Amendment

In consideration of the mutual covenants contained herein, the Parties agree to amend the Agreement as follows:

Section 8 (Salary) is replaced in its entirety with the following:

A. City agrees to compensate Employee for services rendered in the position of City Attorney at an annual salary of $300,203 effective as of the first day of the first full pay period beginning on or after October 1, 2023. Employee will receive an annual salary of $309,209 effective on the first day of the first full pay period beginning on or after October 1, 2024. The salary paid to Employee will be paid in installments on the City's normal paydays, in accordance with the City's normal pay practices, and will be subject to customary withholding for taxes and other required or authorized deductions.

Except as amended herein, all provisions of the Agreement, shall remain in full force and effect.

City of Belmont	Employee
By: _____	By: _____
Julia Mates Mayor	Scott M. Rennie

STAFF REPORT

Meeting Date:	September 10, 2024
Agency:	City of Belmont
Staff Contact:	Stacey Stevenson, Interim Assistant City Manager – Special Projects, sstevenson@belmont.gov
Agenda Title:	Second Amendment to the Employment Agreement Between the City of Belmont and City Manager, Afshin Oskoui
Agenda Action:	Resolution

Recommendation

Adopt a resolution establishing compensation for the City Manager; and authorizing the Mayor to execute Amendment No. 2 to the City Manager employment agreement.

Strategic Focus Area

Fiscal and Organizational Sustainability

Background

On September 24, 2019, the City Council of the City of Belmont unanimously adopted Resolution 2019-098, appointing Afshin Oskoui to the position of City Manager following a recruitment conducted by an executive search firm. The Council approved employment agreement governing the terms of Mr. Oskoui's appointment was effectuated as of September 1, 2019.

Upon completion of his first year of service, in consideration of the COVID19 global pandemic, the City Council and City Manager Oskoui did not consider adjustments to his contract at that time. Upon completion of his third year of service, the City Council approved the first amendment to the City Manager Employment Agreement on November 8, 2022. The Council unanimously approved an amendment to Afshin Oskoui's employment agreement, including three-incremental salary adjustments and an adjustment to leave accrual.

On November 14, 2023, upon conducting Mr. Oskoui's performance evaluation, the City Council selected a sub-committee, comprised of Councilmembers Davina Hurt and Robin Pang-Maganaris to review and make a compensation recommendation based on performance and market position. The subcommittee was also granted the authority to meet and negotiate with Mr. Oskoui. Having considered a market survey and performance, and having met with Mr. Oskoui, the sub-committee reported to the full Council in Closed Session on July 23, 2024 regarding the status of their work and received direction to bring the proposed amendment to the provisions of the City Manager Employment Agreement to Open Session for discussion and consideration in a manner consistent with the provisions of Government Code Section 54953(c)(3).

Analysis

Under City Manager Oskoui's leadership during the evaluation period, the City has accomplished many achievements consistent with the City Council's goals and strategic focus areas. Given these

accomplishments, the City Council has provided direction to amend the City Manager Employment Agreement. The Second Amendment to the Agreement includes provisions that reflect the Council's direction, and which are based on performance over the past year. Consistent with the authority granted by the full City Council, the Council subcommittee directed staff to conduct a survey to determine the City Manager's market position. Surveys represent a fixed moment in time for 2023. At the time of the survey, base pay for the City of Belmont City Manager was found to be in the ninth position out of eleven cities. The survey showed Belmont as $35,403 below the annual mean of the other eleven cities and $33,403 below the annual median.

Survey Summary

Highest Salary	$399,482
Lowest Salary	$288,180
Mean:	$344,019
Median:	$342,019
Belmont:	$308,616

Having considered the market and having considered Mr. Oskoui's outstanding performance in meeting the Council's key directives, the subcommittee recommends an increase in compensation. The proposed second amendment to the employment agreement between the City of Belmont and Mr. Oskoui provides for a market adjustment increase in base pay retroactively effective the first full pay period in September 2023 for the performance period September 2023 to September 2024, and an increase effective the first full pay period in September 2024 for the performance period September 2023 to September 2024.

Base Pay

- A base pay of $339,000 retroactively effective the first full pay period in September 2023; and
- A base pay of $352,560 effective the first full pay period in September 2024

All other terms and conditions remain unchanged.

Alternatives

1. Direct the City Council sub-committee to continue negotiations.
2. Take no action.

Attachments

A. Resolution
B. Proposed Amendment No. 2 to City Manager Employment Agreement

Fiscal Impact

☐ No Fiscal Impact

☒ Funding Source Confirmed: A supplemental budget appropriation for the City Manager Department is necessary and will be incorporated into the mid-year budget review for the current fiscal year, if approved. Associated salary and benefits for the City Manager will be incorporated into next year's budget development and long-

term financial plan.

Source:	**Purpose:**	**Public Outreach:**
Council	Discretionary Action	Posting of Agenda

RESOLUTION NO. 2024 –

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELMONT ESTABLISHING COMPENSATION FOR THE CITY MANAGER; AND AUTHORIZING THE MAYOR TO EXECUTE AMENDMENT NO. 2 TO THE CITY MANAGER EMPLOYMENT AGREEMENT

WHEREAS, on September 24, 2019, the City Council of the City of Belmont unanimously adopted Resolution 2019-098, appointing Afshin Oskoui to the position of City Manager effective of September 1, 2019; and,

WHEREAS, upon completion of his first year of service, the City Council and City Manager Oskoui did not consider adjustments to his contract due to the COVID-19 global pandemic; and,

WHEREAS, upon completion of his third year of service, the City Council approved the first amendment to the City Manager Employment Agreement on November 8, 2022, which included three incremental salary adjustments and an adjustment to leave accrual; and.

WHEREAS, on November 14, 2023, upon conducting Mr. Oskoui's performance evaluation, the City Council selected a sub-committee to review and make a compensation recommendation based on performance and market position, and to meet and negotiate with Mr. Oskoui; and,

WHEREAS, the sub-committee conducted a market survey and reviewed Mr. Oskoui's performance, reporting their findings to the full City Council in Closed Session on July 23, 2024, and received direction to bring the proposed amendment to the City Manager Employment Agreement to Open Session for discussion and consideration; and

WHEREAS, the survey revealed that Belmont's City Manager base pay was below the annual mean and median of comparable cities, and the sub-committee has recommended a market adjustment increase in compensation based on Mr. Oskoui's performance; and

WHEREAS, the proposed Second Amendment to the City Manager Employment Agreement reflects the Council's direction and includes provisions for an increase in base pay retroactively effective from the first full pay period in September 2023, and an additional increase effective from the first full pay period in September 2024.

NOW, THEREFORE, the City Council of the City of Belmont resolves as follows:

SECTION 1. The Council approves Amendment No. 2 to the Employment Agreement for City Manager Afshin Oskoui; attached as Exhibit A; and authorizes the Mayor to execute the amendment.

* * *

ADOPTED September 10, 2024 by the City of Belmont City Council by the following vote:

Ayes:

Noes:

Absent:

Abstain:

ATTEST:

City Clerk

Mayor

APPROVED AS TO FORM:

City Attorney

Second Amendment to the Employment Agreement between the City of Belmont and Afshin Oskoui (City Manager)

This Employment Agreement ("Agreement") is entered into by the City of Belmont, a municipal corporation (hereinafter "City" or "Employer"), and Afshin Oskoui, ("Employee"). City and Employee may be collectively referred to herein as the "Parties."

Recitals

A. On September 10, 2024, the City Council approved the Agreement between the Parties. This Agreement provides for the wages of Employee in the position of City Manager.

B. The Parties desire to amend the Agreement to revise the terms of the Employment Agreement.

Terms of Second Amendment

In consideration of the mutual covenants contained herein, the Parties agree to amend the Agreement as follows:

Section 9 (Salary) is replaced in its entirety with the following:

A. City agrees to compensate Employee for services rendered in the position of City Manager at an annual salary of $339,00, effective as of the first day of the first full pay period beginning on or after September 1, 2023. Employee will receive an annual salary of $352,560 effective on the first day of the first full pay period beginning on or after September 1, 2024. The salary paid to Employee will be paid in installments on the City's normal paydays, in accordance with the City's normal pay practices, and shall be subject to customary withholding for taxes and other required or authorized deductions.

Except as amended herein, all provisions of the Agreement, shall remain in full force and effect.

City of Belmont

By: _____
Julia Mates
Mayor

Employee

By: _____
Afshin Oskoui