

**MEMORANDUM OF UNDERSTANDING  
AMONG  
CITY OF BELMONT, CITY OF BRISBANE, CITY OF DALY CITY, CITY OF EAST  
PALO ALTO, CITY OF HALF MOON BAY, CITY OF MENLO PARK, CITY OF  
PACIFICA, CITY OF REDWOOD CITY, CITY OF SAN BRUNO, CITY OF SAN  
MATEO, COUNTY OF SAN MATEO, AND  
BAIRD + DRISKELL + ABRAMS COMMUNITY PLANNING  
FOR THE  
MULTI-JURISDICTIONAL INCLUSIONARY HOUSING AND NON-RESIDENTIAL LINKAGE  
FEE STUDY**

This Memorandum of Understanding (“MOU”), effective December 15, 2025, is entered into by and among the City of Belmont, the City of Brisbane, the City of Daly City, the City of East Palo Alto, the City of Half Moon Bay, the City of Menlo Park, the City of Pacifica, the City of Redwood City, the City of San Bruno, the City of San Mateo, the County of San Mateo, and Baird + Driskell + Abrams Community Planning, dba Community Planning Collaborative, together referred to herein as the “PARTIES.”

**RECITALS**

WHEREAS, the County of San Mateo and the cities and towns in San Mateo County have a strong history of collaboration and resource sharing on various planning studies and initiatives as part of 21 Elements, which includes the City of Belmont, the City of Brisbane, the City of Daly City, the City of East Palo Alto, the City of Half Moon Bay, the City of Menlo Park, the City of Pacifica, the City of Redwood City, the City of San Bruno, the City of San Mateo, and the County of San Mateo, among other jurisdictions; and

WHEREAS, one such planning study initiated by 21 Elements is the Multi-Jurisdictional Grand Nexus and Feasibility Study (“PROJECT”); and

WHEREAS, the purpose of this PROJECT is to study the feasibility and to comply with the legal requirements of inclusionary housing and commercial linkage fees by sharing analysis and resources for greater efficiency for the eleven jurisdictions participating in this collaborative effort, which include the City of Belmont, the City of Brisbane, the City of Daly City, the City of East Palo Alto, the City of Half Moon Bay, the City of Menlo Park, the City of Pacifica, the City of Redwood City, the City of San Bruno, the City of San Mateo, and the County of San Mateo (collectively, “PARTICIPATING JURISDICTIONS”); and

WHEREAS, through competitive bidding and a request for proposal (“RFP”) process facilitated by the County of San Mateo and Baird + Driskell + Abrams Community Planning, Strategic Economics (“CONTRACTOR”) was chosen as the firm to provide consulting services for the outreach, analysis and planning associated with the PROJECT; and

WHEREAS, Baird + Driskell + Abrams Community Planning, the consulting firm for 21 Elements, has served as the project manager (“PROJECT MANAGER”) for this collaborative effort through initial formation and the RFP process to ensure that the voice of each PARTICIPATING JURISDICTION is heard and their needs are addressed; and

WHEREAS, Baird + Driskell + Abrams Community Planning will continue to serve as the PROJECT MANAGER for the collaborative effort for the duration of the PROJECT; and

WHEREAS, the County of San Mateo will serve as fiscal agent (“FISCAL AGENT”) for the PROJECT and will enter into a separate contract with CONTRACTOR and oversee the payment of invoices on behalf of the PARTICIPATING JURISDICTIONS; and

WHEREAS, the City of Belmont (“TOC GRANT APPLICANT”) applied to the Metropolitan Transportation Commission for a Transit Oriented Communities Planning and Implementation Grant on behalf of the City of Belmont, the City of Brisbane, the City of Daly City, the City of Menlo Park, the City of Redwood City, the City of San Bruno, and the City of San Mateo (“TOC JURISDICTIONS”) and received such grant; and

WHEREAS, with the help of the TOC GRANT APPLICANT, the TOC JURISDICTIONS have received a \$500,000 grant from the Metropolitan Transportation Commission to help fund the PROJECT; and

WHEREAS, all PARTICIPATING JURISDICTIONS enter into this Memorandum of Understanding with the PROJECT MANAGER outlining the roles of each PARTICIPATING JURISDICTION, the CONTRACTOR, the PROJECT MANAGER, and the funding obligations for the PROJECT;

**NOW, THEREFORE, BE IT RESOLVED** that the PARTIES agree as follows:

## AGREEMENT

### **I. PURPOSE**

The purpose of this MOU is to memorialize the understanding among the PARTIES that (1) the PARTICIPATING JURISDICTIONS wish to participate in the PROJECT, (2) the PARTICIPATING JURISDICTIONS agree to use the CONTRACTOR and PROJECT MANAGER as the consulting team, and (3) the County of San Mateo is serving as a FISCAL AGENT to facilitate the PROJECT.

### **II. EXHIBIT AND ATTACHMENTS**

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A – Strategic Economics Work Program and Cost Proposal

Exhibit B – Project Management Scope from Baird + Driskell + Abrams Community Planning

Exhibit C – Project Budget and Agency Costs

### III. PARTIES, ROLES, AND RESPONSIBILITIES

- A. **FISCAL AGENT:** The County of San Mateo shall serve as the FISCAL AGENT for the PROJECT and enter into a separate contract with CONTRACTOR and PROJECT MANAGER. The PROJECT MANAGER shall review all invoices and recommend invoices for payment by the FISCAL AGENT on behalf of the PARTICIPATING JURISDICTIONS to the CONTRACTOR. The FISCAL AGENT shall not be responsible for reviewing invoices or paying any reimbursement requests or other expenditures that are not in compliance with this MOU, and any duly authorized amendments. The FISCAL AGENT shall not be responsible for determining the accuracy of the itemized report.
- B. **PARTICIPATING JURISDICTIONS:** The City of Belmont, the City of Brisbane, the City of Daly City, the City of East Palo Alto, the City of Half Moon Bay, the City of Menlo Park, the City of Pacifica, the City of Redwood City, the City of San Bruno, the City of San Mateo, and the County of San Mateo shall each be a "PARTICIPATING JURISDICTION" for the purposes of this MOU, and collectively the "PARTICIPATING JURISDICTIONS." Each PARTICIPATING JURISDICTION shall provide funding as set forth in Exhibit C for the PROJECT and participate in obligations outlined in the Work Program set forth in Exhibit A, including participation in the overall plan development and implementation.
- C. **TOC JURISDICTIONS:** The City of Belmont, the City of Brisbane, the City of Daly City, the City of Menlo Park, the City of Redwood City, the City of San Bruno, and the City of San Mateo shall be "TOC JURISDICTIONS" for the purposes of this MOU. Each of the TOC JURISDICTIONS is a jurisdiction subject to the Metropolitan Transportation Commission's (MTC) TOC Policy and participated in a joint application for a \$500,000 grant to the PROJECT.
- D. **TOC GRANT APPLICANT:** The City of Belmont shall be the "TOC GRANT APPLICANT" for the purposes of this MOU. The TOC GRANT APPLICANT applied to MTC for and received a Transit-Oriented Communities (TOC) Planning and Implementation Grant on behalf of the TOC JURISDICTIONS. With the support of the PROJECT MANAGER, TOC GRANT APPLICANT will serve as the primary point of contact with MTC and will provide necessary documentation in order to receive grant disbursements. The TOC GRANT APPLICANT will retain 10% of the total grant funds to cover administration of the grant, as reflected in Exhibit C.
- E. **PROJECT MANAGER:** Baird + Driskell + Abrams Community Planning, a California corporation, shall serve as PROJECT MANAGER and shall manage and implement all aspects of the PROJECT, in accordance with the Project Management Scope set forth in Exhibit B.
- F. **CONTRACTOR:** Strategic Economics, a California corporation, shall serve as the consultant to carry out any or all aspects of the PROJECT as the CONTRACTOR, in accordance with the Work Program set forth in Exhibit A.

### IV. FUNDING AND METHOD OF PAYMENT

- A. Each PARTICIPATING JURISDICTION agrees to pay the FISCAL AGENT its full prescribed financial contribution as set forth in Exhibit C, within 60 calendar days of the execution of the MOU by all PARTIES.
1. The CONTRACTOR shall submit invoices to the PROJECT MANAGER on a monthly basis for PROJECT activities. Monthly invoices shall include an itemized report of costs incurred for the PROJECT. A brief narrative progress report shall be included with each invoice.
  2. The PROJECT MANAGER shall review and submit the CONTRACTOR'S invoices to the FISCAL AGENT on a monthly basis for PROJECT activities.
  3. Upon recommendation of payment by the PROJECT MANAGER, the FISCAL AGENT shall pay CONTRACTOR's monthly invoices.
  4. The FISCAL AGENT and PROJECT MANAGER shall provide a quarterly accounting of invoices, payments made, and remaining funds for the PROJECT. A final accounting shall be submitted to all PARTICIPATING JURISDICTIONS with any remaining funds returned.
- B. TOC GRANT
1. With assistance from PROJECT MANAGER, the TOC GRANT APPLICANT will submit milestone deliverables to MTC for approval.
  2. Within 30 days of MTC approval of a deliverable, TOC GRANT APPLICANT will submit an invoice to MTC for grant disbursement.
  3. Upon receipt of funds, TOC GRANT APPLICANT will transfer grant funds to FISCAL AGENT for payment of approved CONTRACTOR and PROJECT MANAGER invoices.
- C. The FISCAL AGENT shall receive a 20% reduction in its financial commitment to the project, as reflected in Exhibit C. The FISCAL AGENT agrees that it will not otherwise be entitled to reimbursement of its costs incurred while performing its obligations as set forth in Section III.A above.
- D. In the event that the projected actual costs of completing the PROJECT Work Program, as set forth in Exhibit A, exceed the budget as outlined in Exhibit C (including the contingency budget amounts), the PARTICIPATING JURISDICTIONS shall confer and decide to either reduce the PROJECT Work Program and/or to provide additional funding, subject to the amendment process set forth in Section VI. All PARTIES agree to use best efforts in such case to reach agreement without causing a PROJECT delay. When the project budget reaches 80% of total budget as shown in Exhibit C, the PROJECT MANAGER will notify all PARTICIPATING JURISDICTIONS of the amount of budget remaining, the estimated expenditure needed to complete the Program, and any anticipated shortfall requiring the

PARTICIPATING JURISDICTIONS to confer as provided in this paragraph.

## **V. TERM**

This MOU shall remain in effect from December 9, 2025, unless terminated sooner pursuant to Section XIII below.

## **VI. AMENDMENTS**

- A. This MOU may be amended only by the written agreement executed by all PARTIES unless the change constitutes a minor modification as described herein. Each PARTICIPATING JURISDICTION'S signatory to this MOU or designee is authorized to make minor modifications to Exhibits A or B regarding the Work Program or the scope of work to respond to necessary changes as the PROJECT evolves, so long as the minor modification (1) impacts only that PARTICIPATING JURISDICTION desiring the modification and (2) does not exceed \$5,000.00. Such minor modifications to the Work Program or scopes of work shall be documented in writing, but shall not require an executed amendment to this MOU, and such minor modifications shall be considered incorporated into this MOU.
- B. If any PARTICIPATING JURISDICTION requires additional services that exceed the approved total cost estimate in Exhibit C, then such services shall be subject to an individual service agreement between that PARTICIPATING JURISDICTION and the CONTRACTOR without the participation of the FISCAL AGENT. The FISCAL AGENT shall not serve as the fiscal agent for any individual service agreements with the CONTRACTOR.
- C. With the exception of the minor modification process described in subsection A, above, this MOU can be amended, modified, or supplemented only in writing(s) signed by all PARTIES. No oral understanding or agreement, present or prior, not incorporated herein shall be binding on any of the PARTIES and the terms of this MOU shall supersede any such understanding or agreement.

## **VII. INDEMNIFICATION**

- A. Each PARTY shall defend, hold harmless, and indemnify the FISCAL AGENT and its officials, officers, employees, agents, volunteers and representatives from any and all claims, suits, or actions of every name, kind, and description brought by a third party which arise out of the terms and conditions of this MOU (collectively, "Claims"); provided that such Claims result from the acts or omissions of such Party and/or its officials, officers, employees, agents, or representatives in connection with this MOU.
- B. Each PARTY shall defend, hold harmless, and indemnify the FISCAL AGENT and its officials, officers, employees, agents, volunteers and representatives from and against any and all Claims related to wages, salaries, benefits, taxes, and all other withholdings and charges payable to, and asserted by or on behalf of its own employees, contractors, representatives, or agents for services provided under this MOU.

- C. FISCAL AGENT shall defend, hold harmless, and indemnify each PARTY and its officers, employees, agents, and representatives from any and all claims, suits, or actions of every name, kind, and description brought by a third party which arise out of the terms and conditions of this MOU and which result from the acts or omissions of FISCAL AGENT and/or its officials, officers, employees, agents, volunteers, and representatives in connection with this MOU.
- D. PROJECT MANAGER shall defend, hold harmless, and indemnify each PARTY and its officers, employees, agents, and representatives from any and all claims, suits, or actions of every name, kind, and description brought by a third party which arise out of the terms and conditions of this MOU and which result from the gross negligence or willful misconduct of PROJECT MANAGER and/or its officials, officers, employees, agents, volunteers, or representatives. Notwithstanding the foregoing, PROJECT MANAGER acknowledges it may be subject to separate indemnification obligations pursuant to its services agreement with FISCAL AGENT.
- E. The duty of each PARTY to defend, hold harmless, and indemnify the other as set forth herein shall include the duty to defend as set forth in Section 2778 of the California Civil Code.
- F. In the event of concurrent negligence (or intentional acts) of FISCAL AGENT and/or its officials, officers, employees, agents, volunteers and representatives on the one hand, and a PARTY and/or its officers, employees, agents, volunteers, and representatives, on the other hand, then the liability for any and all claims for injuries or damage to persons and/or property which arise out of terms and conditions of this MOU shall be apportioned according to the California theory of comparative fault.
- G. Each PARTY'S responsibility for such defense and indemnity obligations shall survive the termination or completion of this MOU.

## VIII. NOTICES

- A. All notices and communications deemed by any party to be necessary or desirable must be in writing and may be given by personal delivery to a representative of the other party or by mailing the same, postage prepaid, addressed as follows:

If to the City of Belmont:

City of Belmont

1 Twin Pines Lane

Belmont, CA 94002

Tobi Liebermann, Housing and Economic Development Manager

(650) 637-2971

[tliebermann@belmont.gov](mailto:tliebermann@belmont.gov)

If to the City of Brisbane:

City of Brisbane  
50 Park Place  
Brisbane, CA 94005  
Julia Ayres, Principal Planner  
(415) 508-2129  
[jayres@brisbaneca.org](mailto:jayres@brisbaneca.org)

If to the City of Daly City:

City of Daly City  
333 90th Street  
Daly City, CA 94015  
Lenelle Suliguin, Housing Manager  
(650) 991-8256  
[lsuliguin@dalycity.org](mailto:lsuliguin@dalycity.org)

If to the City of East Palo Alto:

City of East Palo Alto  
2415 University Ave.  
East Palo Alto, CA 94303  
Karen Camacho, Housing and Economic Development Manager  
(650) 853-3195  
[Kcamacho@cityofepa.org](mailto:Kcamacho@cityofepa.org)

If to the City of Half Moon Bay:

City of Half Moon Bay  
501 Main St.  
Half Moon Bay, CA 94019  
Leslie Lacko, Community Development Director  
650-825-4933  
[llacko@hmbcity.com](mailto:llacko@hmbcity.com)

If to the City of Menlo Park:

City of Menlo Park  
701 Laurel St.  
Menlo Park, CA 94025  
Tim Wong, Housing Manager  
650-330-6761  
[twong@menlopark.gov](mailto:twong@menlopark.gov)

If to the City of Pacifica:

170 Santa Maria Ave  
Pacifica, CA 94044  
Brianne Harkousha, Deputy Director

650-738-7443  
[bharkousha@pacifica.gov](mailto:bharkousha@pacifica.gov)

If to the City of Redwood City:  
City of Redwood City  
1017 Middlefield Road  
Redwood City, CA 94063  
Alin Lancaster, Housing Leadership Manager  
650-780-7299  
[alancaster@redwoodcity.org](mailto:alancaster@redwoodcity.org)

If to the City of San Bruno:  
City of San Bruno  
567 El Camino Real  
San Bruno, CA 94066  
Roscoe Mata, Planning Manager  
(650) 745-1743  
[rmata@sanbruno.ca.gov](mailto:rmata@sanbruno.ca.gov)

If to the City of San Mateo:  
City of San Mateo  
330 West 20th Avenue  
San Mateo, CA 94403  
Rachel Horst, Housing Manager  
(650) 522-7223  
[rhurst@cityofsanmateo.org](mailto:rhurst@cityofsanmateo.org)

If to the County of San Mateo:  
County of San Mateo  
455 County Center, 2<sup>nd</sup> Floor  
Redwood City, CA 94063  
William Gibson, Planner  
650-508-6924  
[wgibson@smcgov.org](mailto:wgibson@smcgov.org)

If to Baird + Driskell + Abrams Community Planning:  
Community Planning Collaborative  
P.O. Box 3616  
Berkeley, CA 94703  
Joshua Abrams, Principal  
510-761-6001  
[abrams@planningcollaborative.com](mailto:abrams@planningcollaborative.com)

- B. The address to which mailings may be made may be changed from time to time by notice mailed as described above. Any notice given by mail shall be deemed given on the day after



that on which it is deposited in the United States Mail as provided above.

#### **IX. INDEPENDENT CONTRACTOR**

The PARTIES agree and understand that the work/services performed by any of the PARTIES or any consultant retained by any of the PARTIES under this MOU are performed as independent contractors and not as employees or agents of the other party. Nothing herein shall be deemed to create any joint venture between the FISCAL AGENT, PROJECT MANAGER, or any of the PARTICIPATING JURISDICTIONS.

#### **X. SUCCESSORS AND ASSIGNS**

No PARTY shall assign, transfer, or otherwise substitute its interest in this MOU, nor its obligations, without the prior written consent of the other PARTY. All obligations created under this MOU shall be binding on, and the rights established herein shall inure to the benefit of, any successors or assigns of the PARTIES.

#### **XI. COMPLIANCE**

The PARTIES must comply with any and all laws, statutes, ordinances, rules, regulations, or requirements of the federal, state, and local governments, and any agency thereof, which relate to or in any manner affect the performance of this MOU.

#### **XII. DISPUTE RESOLUTION**

The PARTIES agree that any dispute arising from this MOU that is not resolved within 30 days by the PARTIES' representatives responsible for the administration of this MOU shall be set forth in writing to the attention of the FISCAL AGENT's Director of Planning and Building for resolution. In the event resolution cannot be reached, the PARTIES may submit the dispute to mediation by a neutral party mutually agreed to by the PARTIES prior to initiating any formal action in court.

#### **XIII. TERMINATION**

Any PARTICIPATING JURISDICTION may terminate its participation in this MOU, with or without cause, upon thirty (30) calendar days' prior written notice to all PARTIES. Such PARTICIPATING JURISDICTION who terminates its participation in this MOU shall be responsible for its pro rata share of all Individual Task costs as set forth in Exhibit C that are incurred by the FISCAL AGENT or CONSULTANT up through the effective date of termination. Any PARTICIPATING JURISDICTION who terminates its participation in this MOU shall still be responsible for the entirety of its prescribed portion of all Shared Task costs as set forth in Exhibit C. This MOU shall continue in effect among the remaining PARTIES.

In addition, the PARTICIPATING JURISDICTIONS may terminate this MOU at any time, with or without cause, by unanimous vote of the PARTICIPATING JURISDICTIONS. Any such action shall specify the

date on which the termination shall be effective.

#### **XIV. CONFLICT OF INTEREST**

If and when a PARTY identifies an actual or potential conflict of interest among one or more of the PARTIES, that PARTY shall send written notification to all PARTIES. The PARTY with the actual or potential conflict shall respond to the notice within seven (7) business days. The response shall indicate whether the PARTY agrees or disagrees that a conflict exists. If the PARTY agrees that a conflict exists, then that PARTY may take appropriate action to cure the conflict, if possible, and shall describe its corrective actions in its response. If the PARTY disagrees, or cannot cure an actual conflict, the PARTIES shall follow the dispute resolution process provided under Section XII, Dispute Resolution, in an effort to resolve the conflict. All notices under this section shall be provided under Section VIII, Notices.

#### **XV. COOPERATIVE DRAFTING**

This MOU has been drafted through a cooperative effort of the PARTIES, and all PARTIES have had an opportunity to have the MOU reviewed and receive advice by qualified legal counsel. No PARTY shall be considered the drafter of this MOU, and no presumption or rule that an ambiguity shall be construed against the PARTY drafting the clause shall apply to the interpretation or enforcement of this MOU.

#### **XVI. COUNTERPARTS**

This MOU may be executed in any number of counterparts, and each executed counterpart shall have the same force and effect as an original instrument and as if all signing PARTIES had signed the same instrument.

#### **XVII. SEVERABILITY**

If any provision of this MOU is deemed invalid or unenforceable by a court of competent jurisdiction, that provision shall be reformed and/or construed consistently with applicable law as nearly as possible to reflect the original intentions of this MOU; and in any event, the remaining provisions of this MOU shall remain in full force and effect.

#### **XVIII. GOVERNING LAW**

This MOU shall be governed by the laws of the State of California as applied to contracts that are made and performed entirely in California. Proper venue for legal shall be exclusively vested in a state court in the County of San Mateo. The parties agree that subject matter and personal jurisdiction are proper in state court in the County of San Mateo, and waive all venue objections.

#### **XIX. NO WAIVER**

No waiver of any default or breach of any covenant of this MOU by any PARTY shall be implied from any omission by the PARTY to take action on account of such default, if such default persists or is repeated. No express waiver shall affect any default not specified in the express waiver, and the

express waiver shall be operative only for the time or extent stated. The consent or approval by any PARTY to or of any act by a PARTY requiring further consent or approval shall not be deemed to waive or render unnecessary consent or approval to any subsequent, similar acts.

**IN WITNESS WHEREOF**, the PARTIES have executed this MOU as follows:

**MEMORANDUM OF UNDERSTANDING  
AMONG  
CITY OF BELMONT, CITY OF BRISBANE, CITY OF DALY CITY, CITY OF EAST  
PALO ALTO, CITY OF HALF MOON BAY, CITY OF MENLO PARK, CITY OF  
PACIFICA, CITY OF REDWOOD CITY, CITY OF SAN BRUNO, CITY OF SAN  
MATEO, COUNTY OF SAN MATEO, AND  
BAIRD + DRISKELL + ABRAMS COMMUNITY PLANNING  
for the  
MULTI-JURISDICTIONAL INCLUSIONARY HOUSING AND NON-RESIDENTIAL LINKAGE  
FEE STUDY**

The individuals executing this MOU represent and warrant that they have the legal capacity and authority to do so on behalf of their respective legal entities.

The undersigned approve the terms and conditions of this MOU.

**COUNTY OF SAN MATEO, as both PARTICIPATING  
JURISDICTION and FISCAL AGENT**

By: \_\_\_\_\_  
David Canepa, President, Board of Supervisors

ATTEST:

By: \_\_\_\_\_  
Sukhmani Purewal, Assistant Clerk of the Board  
of Supervisors

APPROVED AS TO FORM:

By: *Melissa Andrikopoulos*  
Melissa Andrikopolous, County Attorney

# **EXHIBIT A**

## **WORK PROGRAM and COST PROPOSAL**

### **from Strategic Economics**

*SCOPE OF WORK begins on following page*

# **EXHIBIT B**

## **PROJECT MANAGEMENT SCOPE**

### **from Baird + Driskell + Abrams Community Planning**

#### **SCOPE OF WORK**

#### **MULTI-JURISDICTIONAL INCLUSIONARY HOUSING AND NON-RESIDENTIAL LINKAGE**

#### **FEE STUDY,**

#### **PROJECT MANAGEMENT SERVICES**

#### **OVERVIEW**

Baird + Driskell + Abrams Community Planning will provide project management services for a multi-jurisdictional inclusionary housing and non-residential linkage fee study to assess the feasibility and to comply with the legal requirements of inclusionary housing and commercial linkage fees across multiple San Mateo County jurisdictions. The study will be completed by a technical consultant (Strategic Economics) on behalf of the eleven participating jurisdictions of the City of Belmont, the City of Brisbane, the City of Daly City, the City of East Palo Alto, the City of Half Moon Bay, the City of Menlo Park, the City of Pacifica, the City of Redwood City, the City of San Bruno, the City of San Mateo, and the County of San Mateo, with the County of San Mateo acting as fiscal agent for the collaborative project.

Baird + Driskell + Abrams Community Planning will convene the participating jurisdictions and serve as a single point of contact for the technical consultant, with authority to make minor decisions when appropriate.

Baird + Driskell + Abrams Community Planning will coordinate logistics, including arranging meetings and phone calls as needed. Baird + Driskell + Abrams Community Planning will also help Strategic Economics with collecting data and information about existing requirements from the participating and neighboring jurisdictions.

Baird + Driskell + Abrams Community Planning will also support the fiscal agent (County of San Mateo) with review of contracts and assistance with budgeting and invoices. Baird + Driskell + Abrams Community Planning will review all monthly technical consultant invoices and verify for accuracy prior to sending to the fiscal agent for payment. Baird + Driskell + Abrams Community Planning will track monthly invoices and with assistance from the fiscal agent provide regular accounting of invoices and charged and remaining funds for each of the participating jurisdictions' additional tasks.

## **SCOPE**

### **Task 0: Project Management**

- Serve as single/initial point of contact for jurisdictions, technical consultant, stakeholders and members of the public
- Consolidate feedback from jurisdictions
- Coordinate scheduling for meetings
- Collect existing background information on demographics and housing conditions in San Mateo County
- Provide support to the Fiscal Agent
  - Review contracts
  - Review all monthly invoices and verify for accuracy
  - Track monthly invoices
- Provide support to the TOC Grant Applicant (City of Belmont) with TOC grant requirements and communications with ABAG/MTC

### **Task 1: Project Initiation and Kickoff Meetings**

- Schedule and convene group project kickoff meeting
- Schedule and provide support for 1:1 jurisdiction kickoff meetings (11)
- Take notes for meetings
- Coordinate and collect data from jurisdictions to fulfill Strategic Economics's data requests

### **Task 2: Stakeholder & Work-in-Progress Meetings**

2.1: Two Developer Stakeholder Group Meetings

2.2: Housing Advocates & Public Meeting

2.3: Two Work-in-Progress Meetings with Jurisdictions

- Provide support to Strategic Economics for virtual convenings of developer stakeholders (2), housing advocates (1) and the public (1)
- Coordinate follow-up
- Schedule and provide support for Work-in-Progress meetings with jurisdictions (2)

### **Task 3: Residential Feasibility Study and Inclusioinary**

### **Task 4: Residential Nexus Study**

### **Task 5: Commercial Nexus Study**

### **Task 6: Commercial Feasibility Study**

- Support jurisdictions and Strategic Economics in developing project prototypes to be studied

### **Task 7: Recommendations, Reports, Review Meetings**

7.1: Draft Suite of Reports

7.2: Virtual Group Meeting

7.3: One-on-One Virtual Meetings

7.4: Final Reports

7.5: Public Hearings

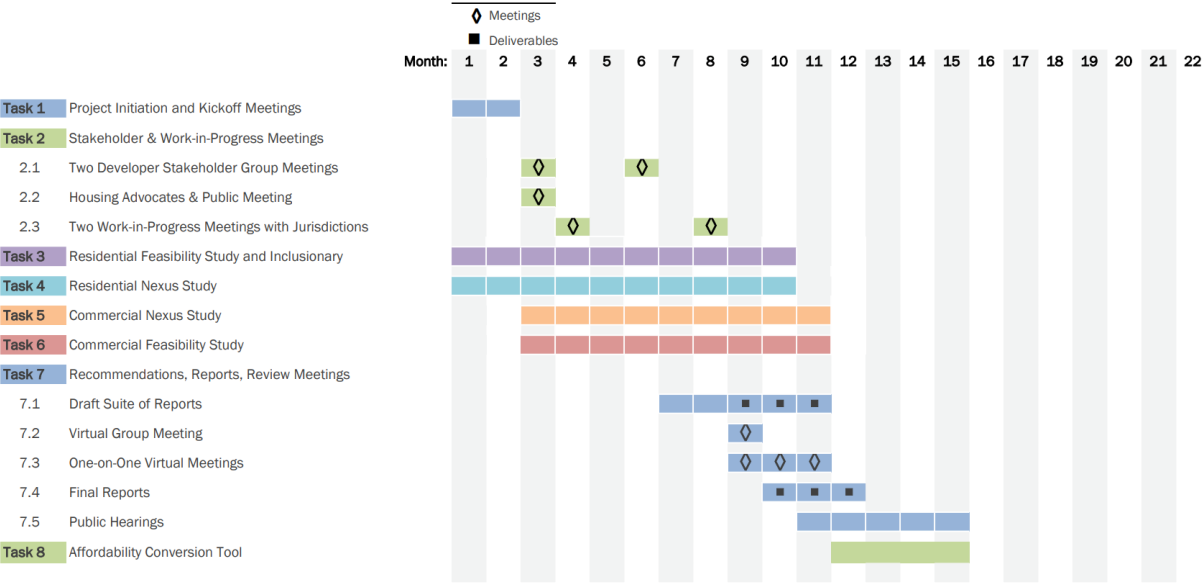
- Schedule and provide support for virtual group meeting to discuss suite of draft “model” reports
- Schedule and provide support for 1:1 jurisdiction meetings (11) to review jurisdiction-specific recommendations and results
- Review reports

## TIMELINE

CPC’s scope will adhere to Strategic Economics’s project timeline, concluding with the final reports to be completed in month 12 after kickoff. CPC’s scope does not include assistance in the public hearings phase of the project.

### Strategic Economics

Proposed Project Schedule for Completion within Two Years of Project Initiation; Revised Draft, 9/23/2025



## BUDGET

CPC will invoice hours on a monthly basis up to a not-to-exceed figure of **\$75,000**.



# EXHIBIT C

## PROJECT BUDGET and COST ALLOCATION FOR PARTICIPATING JURISDICTIONS

*For a breakdown of the Technical Consultant Work Program budget by task, see Exhibit A.*

| TOTAL PROJECT COST                                             |           |
|----------------------------------------------------------------|-----------|
|                                                                |           |
| TECHNICAL CONSULTANT – STRATEGIC ECONOMICS                     | \$619,136 |
| PROJECT MANAGER – BAIRD + DRISKELL + ABRAMS COMMUNITY PLANNING | \$75,000  |
| TOC GRANT APPLICANT ADMIN FEE – CITY OF BELMONT                | \$50,000  |
| TOTAL NOT-TO-EXCEED PROJECT COST                               | \$744,136 |

| TOTAL SOURCES                                   |           |
|-------------------------------------------------|-----------|
|                                                 |           |
| TRANSIT ORIENTED COMMUNITIES (TOC) GRANT        | \$500,000 |
| JURISDICTION CONTRIBUTIONS (as specified below) | \$244,136 |
|                                                 |           |
| TOTAL SOURCES                                   | \$744,136 |

**CONTRIBUTIONS BY JURISDICTION:**

| <b>PROJECT COST for CITY OF BELMONT (TOC JURISDICTION)</b>                                    |                |
|-----------------------------------------------------------------------------------------------|----------------|
|                                                                                               |                |
| Base Scope of Work: Residential and Commercial Studies                                        | \$0            |
| Additional Tasks: Additional Commercial Prototype, Add'l Public Hearings (2 already included) | \$3,109        |
|                                                                                               |                |
| <b>TOTAL</b>                                                                                  | <b>\$3,109</b> |

| <b>PROJECT COST for CITY OF BRISBANE (TOC JURISDICTION)</b>       |            |
|-------------------------------------------------------------------|------------|
|                                                                   |            |
| Base Scope of Work: In-Lieu Fee Calculation / AB 602 LOS Analysis | \$0        |
| Additional Tasks: n/a                                             | \$0        |
|                                                                   |            |
| <b>TOTAL</b>                                                      | <b>\$0</b> |

| <b>PROJECT COST for CITY OF DALY CITY (TOC JURISDICTION)</b>                                                         |                |
|----------------------------------------------------------------------------------------------------------------------|----------------|
|                                                                                                                      |                |
| Base Scope of Work: Residential and Commercial Studies                                                               | \$0            |
| Additional Tasks: Additional Commercial Prototype, Add'l 1:1 Meeting (1), Add'l Public Hearings (2 already included) | \$4,453        |
|                                                                                                                      |                |
| <b>TOTAL</b>                                                                                                         | <b>\$4,453</b> |

| <b>PROJECT COST for CITY OF EAST PALO ALTO (NON-TOC JURISDICTION)</b>     |                 |
|---------------------------------------------------------------------------|-----------------|
|                                                                           |                 |
| Base Scope of Work: Residential and Commercial Studies                    | \$59,314        |
| Additional Tasks: Additional Commercial Prototype, Add'l 1:1 Meetings (4) | \$8,485         |
|                                                                           |                 |
| <b>TOTAL</b>                                                              | <b>\$67,799</b> |

| <b>PROJECT COST for CITY OF HALF MOON BAY (NON-TOC JURISDICTION)</b> |                 |
|----------------------------------------------------------------------|-----------------|
|                                                                      |                 |
| Base Scope of Work: Residential and Commercial Studies               | \$59,314        |
| Additional Tasks: n/a                                                | \$0             |
|                                                                      |                 |
| <b>TOTAL</b>                                                         | <b>\$59,314</b> |

| <b>PROJECT COST for CITY OF MENLO PARK (TOC JURISDICTION)</b> |            |
|---------------------------------------------------------------|------------|
|                                                               |            |
| Base Scope of Work: Residential and Commercial Studies        | \$0        |
| Additional Tasks: Add'l Public Hearing (2 already included)   | \$0        |
|                                                               |            |
| <b>TOTAL</b>                                                  | <b>\$0</b> |

| PROJECT COST for CITY OF PACIFICA (NON-TOC JURISDICTION) |                 |
|----------------------------------------------------------|-----------------|
|                                                          |                 |
| Base Scope of Work: Residential Studies                  | \$36,581        |
| Additional Tasks: n/a                                    | \$0             |
|                                                          |                 |
| <b>TOTAL</b>                                             | <b>\$36,581</b> |

| PROJECT COST for CITY OF REDWOOD CITY (TOC JURISDICTION)                                                                        |                 |
|---------------------------------------------------------------------------------------------------------------------------------|-----------------|
|                                                                                                                                 |                 |
| Base Scope of Work: Residential and Commercial Studies                                                                          | \$0             |
| Additional Tasks: Additional Commercial Prototype, Add'l 1:1 Meeting (4), Add'l Public Hearing (3, of which 2 already included) | \$12,715        |
|                                                                                                                                 |                 |
| <b>TOTAL</b>                                                                                                                    | <b>\$12,715</b> |

| PROJECT COST for CITY OF SAN BRUNO (TOC JURISDICTION)       |            |
|-------------------------------------------------------------|------------|
|                                                             |            |
| Base Scope of Work: Residential and Commercial Studies      | \$0        |
| Additional Tasks: Add'l Public Hearing (2 already included) | \$0        |
|                                                             |            |
| <b>TOTAL</b>                                                | <b>\$0</b> |

| PROJECT COST for CITY OF SAN MATEO (TOC JURISDICTION)                                                               |                |
|---------------------------------------------------------------------------------------------------------------------|----------------|
|                                                                                                                     |                |
| Base Scope of Work: Residential and Commercial Studies                                                              | \$0            |
| Additional Tasks: Additional Commercial Prototype, Add'l 1:1 Meeting (4), Add'l Public Hearing (2 already included) | \$8,485        |
|                                                                                                                     |                |
| <b>TOTAL</b>                                                                                                        | <b>\$8,485</b> |

| PROJECT COST for COUNTY OF SAN MATEO (NON-TOC JURISDICTION, FISCAL AGENT)                                     |                 |
|---------------------------------------------------------------------------------------------------------------|-----------------|
|                                                                                                               |                 |
| Base Scope of Work: Residential and Commercial Studies<br><i>includes discount for fiscal agent admin fee</i> | \$47,451        |
| Additional Tasks: Add'l Public Hearing (1)                                                                    | \$4,230         |
|                                                                                                               |                 |
| <b>TOTAL</b>                                                                                                  | <b>\$51,681</b> |