



Date: July 17, 2002

To: Inter-Regional Partnership Members

From: IRP Staff

RE: Guiding Principles, Project and Zone Evaluations

Background

Representatives of the San Francisco Bay Area and the Central Valley formed the Inter-Regional Partnership (IRP) because they realized that collaborative planning was the best way to adequately address wide ranging inter-regional issues, such as jobs-housing imbalance, lack of affordable housing, and air quality improvements.

Staff recommends that the IRP direct staff to develop guiding principles and consider the recommended evaluation strategies that will be based on the guiding principles. They would also be used in the Pilot Project Evaluation and Zone progress report.

Guiding Principles

When formed in 1998, the Inter-Regional Partnership adopted a set of goals, including:

- Achieve a more equitable jobs/housing balance.
- Improve transportation and air quality.
- Enhance the quality of life throughout our inter-regional area.
- Pursue inter-regional economic development opportunities.
- Establish more sustainable methods of moving people between their homes and distant jobs.

Staff suggests that the IRP consider adopting a set of guiding principles to more clearly define the goals and objectives and help guide the actions that are undertaken to achieve the above identified goals. For example, the IRP can more clearly define what it means to “achieve a more equitable jobs/housing balance” and to “improve transportation and air quality.” Defining the terms within the goals and the actual objectives to be sought under these goals will help move the IRP forward in prioritizing future activities and evaluating current work.

IRP Pilot Project Evaluation

The Inter-Regional Partnership (IRP) enabling legislation requires that a process be set up to evaluate the progress of the Inter-Regional Partnership State Pilot Project. This section will identify what is required by the state and make recommendations for additional components that reflect the goals of the IRP.

State law stipulates only that the IRP designate a “qualified consultant to conduct an evaluation of the pilot project.” It is at the discretion of the IRP to determine how best to achieve this objective. The IRP will need to direct the consultant on how to conduct the program evaluation and what criteria to measure the program against. Staff recommends that the IRP issue a request for proposals (RFP) where these details are defined. The RFP should include the IRP’s goals and any set of guiding principles that is adopted.

At the next IRP meeting, staff will present the IRP with a draft RFP for their consideration.

Evaluation of Opportunity Zone Progress

The Inter-Regional Partnership (IRP) enabling legislation also requires that a process be set up to evaluate the progress of the Jobs/Housing Opportunity Zones. This section identifies the evaluation components required by the state and makes recommendations for additional components that reflect the goals of the IRP.

State law requires that the progress in equalizing the jobs/housing balance of the jurisdiction receiving an opportunity zone be evaluated. This evaluation should compare the ratio of jobs and housing in the jurisdiction before receiving the Jobs/Housing Opportunity Zone and after development has been completed. Determining whether a job/housing imbalance has been mitigated will be based on the following data:

- The number of building permits issued, as provided by the participating jurisdiction.
- The number of jobs generated, as determined by the Employment Development Department and/or surveys to employers in the Zones.

The following additional components may also be useful in evaluating the effectiveness of the Zones:

- Percent of Zone development completed by July 31, 2004,
- Number of local residents hired to fill job positions and/or the number of local workers who moved to be closer to their jobs,
- Number, and type, of incentives the Zones were able to utilize,
- Percent of residents and/or workers who utilize public transit, or other alternative transportation, to commute, and
- Percent, and number, of affordable housing units created.

In addition, if adopted, guiding principles would be used to inform the evaluation criteria for the Zones.

Requested Action(s)

Staff requests that the IRP members consider action to:

1. Direct staff to draft a set of “guiding principles” for the Partnership to consider at their next meeting. These guiding principles will be incorporated into both the project and zone evaluation process.
2. Direct staff to draft a request for proposals for a consultant to prepare an evaluation of the IRP Pilot Project.
3. Direct staff to draft an evaluation process that will include the identified components for the Jobs/Housing Opportunity Zones.