



REQUEST FOR QUALIFICATIONS

Strategic Planning Refresh – Housing Affordability Consultant Contract Position; Oakland

OVERVIEW: TransForm is seeking an experienced consultant to help us craft a strategic initiative that leverages our expertise in transportation and land use policy to address housing affordability and displacement. This initiative will update our existing work to support more affordable homes near transit with new strategies in response to the affordability crisis in the Bay Area and California. We are looking for someone to begin working with us starting as soon as possible and complete this project in July 2017. The budget for this project is \$20,000.

ABOUT TRANSFORM: TransForm promotes walkable communities with excellent transportation choices to connect people of all incomes to opportunity, keep California affordable and help solve our climate crisis. With diverse partners we engage communities in planning, run innovative programs and win policy change at the local, regional and state levels. Learn more about our mission and work at www.TransFormCA.org.

BACKGROUND: TransForm has long worked at the intersection of transportation, land use and housing – starting with our very first campaign in 1997 to get MTC and ABAG to complete a regional smart growth strategy that focused on alternative transportation investment and land use scenarios. Since that time we've worked on housing in a number of ways – from the site to local to state levels. This includes creating our groundbreaking GreenTRIP certification program, co-founding the Great Communities Collaborative, working on local inclusionary zoning policies, and helping lead the effort to get state climate investments to fund affordable transit-oriented development.

As the housing affordability crisis grows, and resulting gentrification and displacement threaten the stability of low-income communities, TransForm wants to take an even more focused approach to our work on housing affordability and displacement. We can't create a California that remains affordable and addresses the climate crisis without building more housing and preserving housing affordability for low-income people.

Furthermore, if the transportation and community development projects we advocate for are not implemented in tandem with strategies that stabilize communities, they can contribute to gentrification and displacement. We are committed to preventing or minimizing these negative impacts on low-income communities and communities of color.

We are seeking a consultant to advise us on housing policy, help us flesh out one or more specific policy ideas that we are exploring, and advise how we can have the most strategic impact,

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especially focusing on TransForm’s specific strength of linking transportation strategies to housing policy and investment.

GOALS OF THE PROJECT:

- 1) Work with TransForm staff and board in developing a vision and outlining a 3-year work plan for TransForm to address the housing crisis, with a focus on transit-oriented housing affordability and community stability.
- 2) Craft one or more potential new strategies for making homes more affordable, while also dramatically reducing transportation costs and climate impacts.

PROPOSED SCOPE OF WORK: The consultant will work closely with Shannon Tracey, Deputy Director of Campaigns, to finalize and implement the scope of work, with these anticipated roles and milestones.

Objective 1: Provide housing policy expertise to inform TransForm’s planning	
April	Initial meeting/overview
	Review of draft case statement and internally-generated ideas to provide feedback and recommendations; identify missing evidence/background needed to strengthen case statement
	Develop plan for external stakeholder engagement including focus groups to gather input from on potential strategies
April-May	Conduct research to fill in identified gaps in case statement (statistics, background, etc)
	Synthesize feedback from focus groups and provide feedback and recommendations for refining strategies
May-June	Review updated case statement and strategies document to provide feedback and recommendations
	Advise and potentially work with staff in outlining external brief on new initiative and identifying possible funders for this work
July	Review final documents and offer feedback
	Support staff on outreach and distribution to allies, potential funders and others.

Objective 2: Research and refine new strategy(-ies) for affordability initiative	
<i>Deliverable: 3-5 page background brief on 1 or 2 new strategies for consideration</i>	
April	Meet with staff to discuss potential new strategies and choose 1-2 for further investigation; set research plan and timeline
May	Conduct research, integrating external stakeholder outreach into focus groups as much as possible
	Provide progress update to staff at end of month; receive feedback and recommendations
June/July	Continue research and write draft background brief(s)
	Share draft brief(s) with staff at regular meeting on 6/13
	Complete research and revise background brief(s)

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	Share final brief(s) with staff and help integrate relevant components into overall housing initiative documents
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ADDITIONAL DETAILS ON DELIVERABLE FOR OBJECTIVE 2:

For each of the 1-2 new strategies, the background brief should include:

- a) Brief summary of specific affordability strategy and how it advances our impact areas
- b) Why this strategy is a good fit for TransForm
- c) 5-year goals with intermediate milestones
- d) Possible pitfalls and how to avoid them
- e) Potential partners to work with and description of roles in partnership
- f) Potential funders who might be interested in this strategy
- g) Unanswered questions and uncertainties that TransForm will need to consider
- h) Annotated bibliography with all published literature and URL links

HOW TO APPLY: Please compile an application made of four documents:

- (1) A cover letter describing your relevant experience and qualifications as relates to this project, including
 - past work in housing policy, especially any related to affordable housing and policies to prevent displacement,
 - knowledge of transportation and land use planning, and
 - experience or strong relationships with any key allies, funders or others;
- (2) Your resume;
- (3) A budget proposal for this project; and
- (4) Three relevant references.

Send these documents as a single PDF to Shannon Tracey, Deputy Director of Campaigns at shannon@transformca.org no later than April 4, 2017. We will begin interviews in early April. Applications will be reviewed on a rolling basis until position is filled.