

# Metropolitan Transportation Commission

## Consulting Services for the Bay Area Regional Prosperity Plan Economic Prosperity Strategy

### Scope of Work

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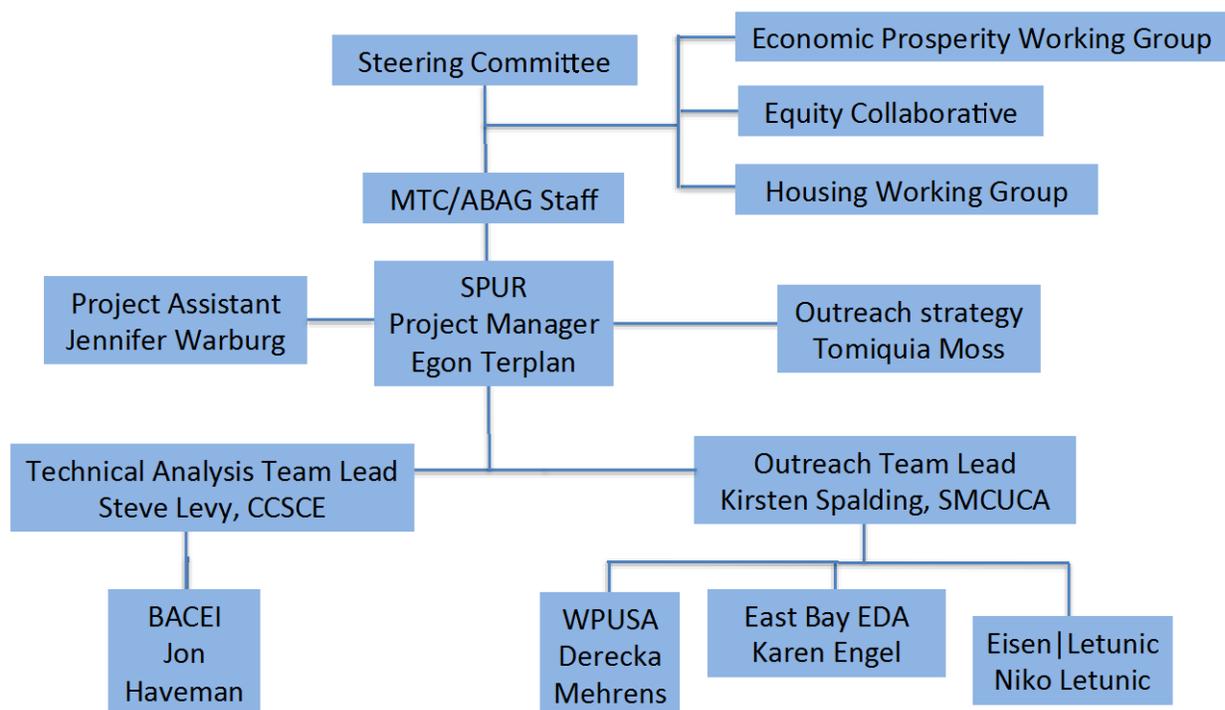
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## Section I. Organizational Chart of Key Personnel

The proposed project team consists of members from SPUR, BACEI, CCSCE, East Bay EDA, Eisen|Letunic, SMCUCA and WPUSA. The key staffs from these organizations have led economic and workforce development projects as well as major outreach efforts throughout the Bay Area and California for decades. This team has in-depth knowledge of the Bay Area economy, its sub-regions and its neighborhood and community challenges. SPUR shall be the prime consultant and the primary point of contact for the client and the various project working groups.

**Organizational Chart**



## Section II. Work Plan

### Task 1: Project Management

#### *Task 1.1 Kick-Off Meeting*

After finalizing the contract, SPUR staff and other key team members will conduct a kick off meeting and work session with core MTC and ABAG staff. In addition to establishing a basis for good communication between MTC Project Manager and the SPUR team throughout the project, the purpose of the meeting will be to reach agreement on the following:

- **Final Scope of Work:** SPUR shall present its understanding of the project Scope of Work and propose an approach that fulfills the intention of the HUD Regional Prosperity Plan initiative. SPUR shall resubmit the Scope of Work pending any changes in approach decided at this kick-off meeting.
- **Final budget by task and subtask:** SPUR shall present its budget for completion of all work outlined in the Scope of Work.
- **Detailed project schedule and milestones:** SPUR shall develop and present its proposed project schedule, including key milestones and the anticipated project completion date. MTC Project Manager and the SPUR team shall also discuss the timing and potential locations of the Stakeholder convening (Tasks 2.4) as well as the Committee and Working Group meetings (Task 2.3). These decisions may not take place at the initial kick-off meeting but will need to be decided relatively early in the project with input from the EPWG.

#### *Task 1.2 Subsequent Calls and Progress Reports*

Throughout the project, SPUR will be in regular communication with MTC Project Manager. This will be accomplished principally through bi weekly phone meetings. Additionally, SPUR shall submit quarterly progress reports. SPUR will also invoice MTC monthly.

SPUR shall also produce a detailed calendar of tasks and deliverables, including all rounds of outreach. SPUR shall use this calendar and other material to manage the overall flow of the project. SPUR expects MTC and ABAG staff to assist in the scheduling and calendaring of key project working groups (EC, EPWG and SC) to ensure that the project team is able to present material and get appropriate feedback in a timely way in order to prevent an unnecessary slow down of the project.

SPUR also plans to hold weekly briefings and calls with the project team members.

As the prime consultant, SPUR shall also take the lead on all activities and deliverables. SPUR's project manager will be the main point of contact between MTC Project Manager and the team.

*Deliverables:*

- Calendar of dates and key milestones.
- Project progress reports and invoices (monthly).
- Final Scope of Work and budget.

*Task 1 Budget:* \$44,146.

## Task 2: Outreach and Engagement

The SPUR team's approach to outreach and engagement is what differentiates this project from a typical plan or strategy. Stakeholders are not just participants with information and ideas, but leaders who will help define and then implement the strategy. They will come together to help identify barriers to growing jobs and firms as well as connecting Low- and Moderate-Income (LMI) workers to jobs. They will also come together to identify solutions and strategies to overcome these barriers. The SPUR team shall present analytic and best practice material at each step in the outreach process as a way to frame the discussion as well as to ensure that participants have access to the best information and options.

The SPUR team shall use its existing relationships to help convene working groups and reach out to engage new people and organizations in the working groups. This is equally true in the communities where our teams currently work as well as in communities and subregions where we have fewer existing relationships. As a team, we are committed to working throughout the entire Bay Area and shall identify communities and locations with input from MTC and ABAG staff as well as the EPWG and SC.

The following are the categories of the groups and entities the SPUR team expects to convene:

- *Advocacy organizations.* The types of organizations shall include low-income community groups, affordable housing advocates, faith-based organizations, local environmental groups, public transportation and transportation planning advocates and equity-oriented community organizations and their advocacy partners.
- *Workforce development organizations.* The types of organizations and entities shall include Workforce Investment Boards, Community Colleges, profit and not for profit training providers, vocational programs, adult schools, and union sponsored apprenticeship programs.
- *Labor organizations.* The types of entities shall include local unions, Central Labor Councils, Building and Construction Trade Councils, and labor's legislative and policy leaders.
- *Businesses and business organizations.* This shall include individual firms in both the export and local-serving portion of the economy, business advocacy organizations, and public/private and/or nongovernmental economic development organizations.
- *Local government.* The types of local government agencies and policy makers shall include elected officials, planning departments, local economic development departments, planning departments, housing departments and successors to redevelopment departments.
- *Transportation.* This will include Congestion Management Agencies, transit operators, and local Departments of Transportations.

In addition to identifying individuals and institutional stakeholders in the above categories, the Outreach and Engagement Plan will also identify other collaborations and consortia already working to implement related economic and workforce development initiatives focused on LMI workers. These groups will be engaged through interviews and briefings throughout the process.

### ***Task 2.1 Outreach and Engagement Plan***

This task is one of the initial tasks of the overall project and whose deliverable at the end of month two will be a guide for the remainder of the overall project. With input from MTC, ABAG, the Economic Prosperity Working Group (EPWG) and the Equity Collaborative (EC), the SPUR team shall develop a Outreach and Engagement Plan.

The Outreach and Engagement Plan will at a minimum include:

- Key Stakeholder Interviews (2.2)
- Committee and Working Group meetings (2.3)
- Sub-regional Stakeholder Convenings (2.4)

Specific activities will include:

- Work with MTC, ABAG, the Steering Committee, EPWG and EC to finalize the selection of subregions.
- Develop subregional lists of stakeholders across grassroots organizations, employers, workforce development agencies, public sector staff and elected officials from the categories described above.
- Seek additions to the stakeholder lists from MTC, ABAG, the Steering Committee, EPWG and EC.
- Identify current activities underway in each of the subregions that will complement or potentially detract from the development of the Economic Prosperity Strategy.
- Develop an outreach strategy specific to each subregion that will engage representative stakeholders and build on existing work in the subregion.
- Seek input into the draft Outreach and Engagement Plan from MTC, ABAG, the SC, EPWG and EC.
- Develop a timeline for implementing the Outreach and Engagement Plan.
- Present final outreach and engagement plan to MTC, ABAG, the Steering Committee, EPWG and EC.

*Deliverables:*

- Outreach and Engagement Plan (draft and final).
- Stakeholder lists (including businesses such as anchor employers in the Industries of Opportunity).
- Memorandum analyzing ongoing work by other organizations on related economic and workforce development projects.

### ***Task 2.2 Key Stakeholder Interviews (25 maximum)***

This task involves conducting up to twenty five (25) one-on-one and/or group interviews to get input on key challenges, opportunities and priorities that should be addressed by the Strategy. The interviews serve five purposes:

1. Conduct briefings with key stakeholders whose participation or endorsement will be key to success of the engagement process.
2. Identify potential leaders who might be able to convene or co-chair meetings during the engagement process.

3. Confirm or reject concepts or hypotheses from the analytic work (from Task 3.2).
4. Gather feedback on gaps in existing reports and strategies (for Task 3.1).
5. Identify and assess applicable strategies being implemented in the region (for Task 4.2).
6. Identify additional barriers and strategies.

*Specific Activities of Task 2.2 include:*

- Develop interview framework and questions/survey. This will include questions that will help identify gaps in the region's existing research and reports. The interview framework will focus on information needed to fill those gaps (such as greater information on target populations, Industries of Opportunity and places of opportunity).
- Identify stakeholder list.
- With assistance from MTC and ABAG staff, schedule interviews and send interviewees background material on the project.
- Conduct interviews.
- Develop and distribute survey questions via email to key stakeholder groups (such as WIB directors, transit operators, business organizations).
- Summarize interview findings and results of surveys and produce memo.

*Deliverables:*

- Background memo for interviewees.
- List of interviewees.
- Survey Instrument.
- Summary of Interviews memo.

In partnership with MTC and ABAG staff and members of the working groups, the SPUR team shall identify a list of up to 25 people and/or groups to conduct one-on-one or group interviews. MTC and ABAG staff will assist with the scheduling and coordination of the interviews for all team members.

### ***Task 2.3 Committee and Working Groups Meetings (12 meetings total)***

The project team will present key findings to the Economic Prosperity Working Group (EPWG) and the Steering Committee (SC). The SPUR team shall also invite members of the Housing Work Group (HWG) and Equity Collaborative (EC) to key meetings of the EPWG as appropriate. The purpose of this task is to review the work program and/or draft and final deliverables over the course of the project as well as to solicit their feedback and engagement in key aspects of the project where they have expertise and/or interest.

The SPUR team shall attend a total of twelve (12) meetings of the project Steering Committee, EPWG and the EC. The meetings will be identified in coordination with MTC and ABAG staff and Committee/Working Group co-chairs.

The SPUR team proposes at least three presentations to the Steering Committee and Equity Collaborative at key points in the project as well as up to six to the EPWG, for a total of 12 meetings. Given the composition of each group, the emphasis of meetings with each group will vary.

## Role of the Economic Prosperity Working Group

EPWG will provide input on all aspects of the project. The SPUR team shall plan to present to the EPWG roughly every two months over the course of the year, with meetings in April, June, September, November of 2013, and January and March of 2014. At some of the initial meetings, the SPUR team shall facilitate a discussion as part of 3.1 (Review of Existing Research and Findings), given that many members of EPWG were involved in the prior reports. The purpose of the discussion will be to ascertain the EPWG members' thoughts on what gaps need to be filled in the upcoming project research. The SPUR team shall also present 2.1 (Outreach and Engagement Plan) to the EPWG. As research becomes available, the SPUR team shall present material from 3.2 (Technical Analysis). This will take place several times over the course of the project. EPWG will also provide feedback on the initial set of barriers determined during interviews and initial rounds of outreach. EPWG will provide input on proposed strategies prior to Round Three of outreach and on the draft set of recommendations for the final strategy report. It is expected that some members of the EPWG will also participate in the outreach.

## Role of the Equity Collaborative

At an early meeting with the EC, the SPUR team shall gather input from the Equity Collaborative on the overall project approach and encourage the EC to provide additional support for related outreach activities. The SPUR team shall also present the Outreach and Engagement Plan, with a particular emphasis on ensuring that the SPUR team has identified the appropriate CBOs in various subregions. The SPUR team shall additionally present analysis of barriers to job access and gather input and feedback from the EC, based on their experiences in communities and working with LMI residents throughout the region. Similarly, the EC will provide feedback on proposed strategies and interventions. If appropriate, members of the EC might take a leadership role in helping implement some of the recommendations, whether as part of a future pilot project or as part of their regular work.

## Role of the Steering Committee

While the other working group's suggestions will be advisory, the Steering Committee will provide the final input on the overall strategy and recommendations. The Steering Committee includes some overlap with the other two groups, including co-chairs of the Housing Working Group and elected officials on ABAG and MTC. As a result, one specific role of the SPUR team's presentations at the SC will be to share information that is relevant to policy decisions at MTC and ABAG, particularly as it relates to transportation access and other infrastructure deficiencies. Further, it is an opportunity for the SPUR team to share information and gather input from members of the Housing Working Group.

*Specific activities of Task 2.3 include:*

- Developing a schedule and agenda for all meetings with Steering Committee, EPWG and EC.
- Developing presentation material or other summaries for MTC, ABAG, the Steering Committee, EPWG and EC.
- Summarizing meeting outcomes in memos and briefing calls.

*Deliverables:*

- Presentations for meetings.

- Meeting materials (agendas and handouts).
- Summary of input from Committee and Working Group meetings (memo format)

### ***Task 2.4 Stakeholder Convenings (up to 21 convenings; 3 rounds)***

The SPUR team shall plan to conduct outreach in six locations for a total of three rounds of meetings each. The SPUR team shall be willing to conduct outreach in a seventh location pending feedback from MTC and ABAG staff, the EPWG and SC.

The SPUR team shall identify the places for stakeholder convenings based on analysis of data showing the location of LMI workers as well as Industries of Opportunity. The SPUR team shall identify places that cover a range of communities across the entire Bay Area. The final list will be determined after review of the data, with input from MTC and ABAG staff, the EPWG and SC. The locations for stakeholder convenings could include:

- Two in Alameda County (such as in Oakland and the TriValley)
- One in Contra Costa County (such as in Antioch/Pittsburg or elsewhere in East County)
- One in San Francisco County
- One in Santa Clara County (such as in San Jose)
- One in the North Bay (such as in Santa Rosa)

In selecting the locations for the stakeholder meetings, it will be important to balance an approach that tries to cover the region's geography with the need to target this project towards places with a large concentration of LMI workers and/or where participants will have the greatest likelihood to implement the strategy. The SPUR team shall be cognizant of these tradeoffs and expect to discuss this early on in the project with MTC.

The following is the approach to these meetings. To the extent feasible, the convenings will be chaired or co-chaired by leaders identified from among each sub-regional grouping of stakeholders. Facilitators from the SPUR team shall strive for continuity across the convenings and depth of commitment to the strategy that will coalesce by having the majority of same stakeholders participate in all three rounds in a particular sub-region. Some industry leaders and experts may only attend Round Two of the convenings (as discussed below).

### **Round One: Challenges and Barriers (community focus)**

Using the research findings developed in the Key Stakeholder Interviews and Task 3, the stakeholders will corroborate, expand, challenge and/or modify the conclusions about barriers and challenges for enhancing economic opportunity for the specific situation in each sub-region.

This process will work to determine whether the economic development trends generated by the analytical work appear feasible to stakeholders, whether there are other economic trends that the analysis failed to identify, and whether there are unique or special trends that make them advantageous or problematic for LMI workers. For example, if there is growth in entry level IT jobs, but the standard for hiring is for experienced employment only, then first time job seekers will face potentially insurmountable obstacles.

The outcomes of Round One will be an outline that shall include:

1. Identified and prioritized barriers to economic advancement and job access for LMI workers.

Note that categories for organizing and framing barriers and challenges, listed below, will be fleshed out in Round Two, which is more focused on barriers to firms:

- Training and workforce development.
  - Commuting and transportation access.
  - Local regulations and land use planning.
  - Business and economic development
  - Other categories as emerge from the Round One meetings.
2. Opportunities for economic advancement with a particular emphasis on opportunities for new jobs and replacement jobs that will serve local residents (either residents in the sub-region or in neighboring sub-regions accessible by public transportation).

### Round Two: Additional Challenges and Barriers and Initial Strategies (cluster focus)

Using the outline developed in Round One, Round Two will focus on the needs and challenges of the cluster or clusters of firms identified Industries as or Occupations of Opportunity in that sub region. Critical to these meetings will be the participation of anchor firms and others in their cluster as well as the workforce development partners who are working in that sector. These meetings will again include the voices of people who currently live in the sub region and who could potentially take advantage of the opportunities identified. But the emphasis and focus of Round Two is on the barriers for the firms.

The SPUR team shall attempt to facilitate interaction between the industry representatives and the representatives of low and moderate income workers and grassroots organizations to see if they can collaboratively develop solutions to overcome identified obstacles. To the extent feasible, the SPUR team shall ask for participants to only propose solutions that they themselves will be willing to help implement.

The outcomes of Round Two shall include:

1. An outline of challenges and barriers identified by category (listed in Round One above).
2. Initial ideas for strategies to overcome these challenges for the particular industry sectors.  
The challenges and opportunities will likely follow the framework/outline identified above.

### Round Three: Solutions and Strategies

Using the outline of challenges and strategies developed in Round Two, Round Three will focus on a draft strategic plan that will include both regional and sub-regional strategies to achieve economic prosperity for LMI workers throughout the Bay Area. Stakeholders will corroborate and/or challenge the proposed strategies and identify potential pilot projects and implementation next steps to achieve the strategies.

Outcomes of Round Three shall include:

1. An outline of the sub regional strategy components to be incorporated in Task 4 draft and final strategy.
2. Commitments on the part of stakeholders to implement the identified strategies.

Specific Activities across Task 2.4 include:

- Identifying stakeholder groups in each subregion.

- Developing a process of support from the EC to equity stakeholders who would otherwise lack the capacity to participate in the convenings.
- Developing project background materials for stakeholders and making invitations.
- Arranging meeting logistics including facilities, audio-visual capacity, food and (if necessary) transportation, translation and child care.
- Inviting stakeholders to participate and conducting one-on-one briefings of stakeholders prior to the first meeting so that stakeholders will be able to engage effectively.
- Developing agendas, materials and presentations for each meeting.
- Facilitating meetings.
- Developing meeting minutes.
- Briefing consultant partners on meeting outcomes.
- Applying “best practices” from Task 4 to the identified barriers in each subregion.
- Synthesizing Round One and Round Two meeting outcomes in each subregion to prepare for first draft strategy.
- Synthesizing Round Three outcomes to develop final strategy.
- Developing framework and categories for potential pilot projects.

*Deliverables:*

- Meeting materials.
- Presentations.
- Meeting summaries for all convenings.

The SPUR team shall work with the Equity Collaborative to develop a support fund for grassroots organizations groups who will need additional resources to participate fully in the stakeholder meetings.

*Task 2 Budget: \$188,262.*

## **Task 3: Technical Analysis**

The work on Task 3 will involve an iterative process where an initial round of review and analysis is presented to and informed by stakeholder groups and MTC and other client team members. The work will be organized to inform the stakeholder interviews and early convening meetings, and incorporate feedback.

### ***Task 3.1 Review of Existing Research and Findings***

There are numerous reports and strategies already completed in the region focusing on economic growth, industry competitiveness, commuting, or economic inclusion. The SPUR team shall summarize key findings from these reports into a single document that identifies the key conclusions as well as gaps in the research. The purpose of the task is two fold:

1. To summarize in one place the key conclusions about the current and future Bay Area economy, economic development and land use plans, and commute patterns from the perspective of equity and inclusion.
2. To develop consensus among key stakeholders as to the missing research or gaps in the conclusions that need further analysis or exploration.

The SPUR team shall review the reports listed below:

- Living Cities, Urban Habitat and Reconnecting America's Moving to Work Study
- East Bay Economic Development Alliance's Regional Economic Assessment Report ([http://eastbayeda.org/research\\_facts\\_figures/building\\_on\\_our\\_assets\\_2011\\_Report.htm](http://eastbayeda.org/research_facts_figures/building_on_our_assets_2011_Report.htm))
- Bay Area Council Economic Institute's Bay Area Economic Strategy Framework (<http://www.bayareaeconomy.org/publications-list/>)
- City of San Jose's Economic Development Strategy (<http://www.sanjoseca.gov/index.aspx?NID=3331>)
- Back Streets Business Advisory Board's Made in San Francisco Report (<http://sfgsa.org/Modules/ShowDocument.aspx?documentid=39>)
- MTC and ABAG's Jobs-Housing Connections Strategy, Plan Bay Area
- Association of Bay Area Government's forecast data

In addition to the reports listed above, the SPUR team shall review other research studies and strategy documents that can inform the project work. These include:

- Sector based workforce studies completed by local workforce boards and other organizations throughout the region.
- The work of the Career Ladders Project.
- Reports from or suggested by the California Workforce Board.
- Related studies such as:
  - The ADVANCE program of the Building Skills Partnership that combines ESL and job skills for janitors.
  - The Workforce Investment Works initiative of the National Association of Workforce Boards.
- A recent study of labor mobility and commuting patterns for the San Mateo County Economic Development Agency (SAMCEDA).
- The 2007 and 2012 update of the San Francisco Economic Strategy, a report with a particular emphasis on LMI residents and workers.

This task will be split into two parts:

- A review of studies related to the regional economy, forecasts of sector growth and job openings, economic development strategy, and workforce development and education reports and strategies.
- A review of studies related to land use and transportation including access to jobs and barriers and challenges related to low and moderate-income residents and communities.

Specific activities:

- Develop a final list of specific reports to review.
- Summarize the key findings in the reports as they relate to Industries and Occupations of Opportunity as well as specific barriers facing LMI residents in accessing quality jobs.
- Identify potential overlap among the proposed strategies.
- Identify gaps in the existing reports, which will be informed at a later point in the project by input from Round One of the stakeholder convenings.

- Summarize the results in the form of a memo and presentation.
- Present the results to the EPWG, EC and SC.

*Deliverables:*

- List of reports that were reviewed, with links or copies of all such public reports made available on the Basecamp.
- Report that summarizes key findings and identifies gaps in existing reports and need for additional research to be conducted in Task 3.2.

### ***Task 3.2 Technical Analysis***

Task 3.2 accounts for the bulk of the technical analysis and production of new material (maps, data sets, industry and occupational projections, analysis of key regional places) for this strategy report. The initial scope of Task 3.2 will be informed by the results of Task 3.1. The early analysis from 3.2 of Occupations and Industries of Opportunity will inform the outreach undertaken in Task 2.

In short, the analysis in 3.2 is iterative. The SPUR team shall conduct some initial analysis to share with the various working groups as well as to select places for outreach. The results of the outreach will lead to additional analysis. Ultimately, the purpose of Task 3.2 is to identify a common set of definitions of industries and occupations that should be the focus of this broader strategy.

#### **3.2 (a) Forecasts of Industries and Occupations of Opportunity.**

The SPUR team shall expand the concept of “Industries of Opportunity” to also include “Occupations of Opportunity” of relevance to low and moderate-income workers. The SPUR team shall also expand the concept of growth industries and occupations to include replacement job openings, which may be large even in industries and occupations expected to show low overall growth.

The SPUR team shall work with MTC, ABAG and the EPWG to define and identify “quality jobs” and the criteria for Industries and Occupations of Opportunity. The SPUR team accepts as a starting point that “quality jobs”:

- Provide a range of living-wages with clear pathways to advancement;
- Have growth potential and a competitive advantage in the Bay Area;
- Require medium-skilled labor that can be trained locally, if needed;
- Be suitable to be located in transit-accessible areas;

*Deliverables:*

- Analyze and identify Occupations of Opportunity:
  - Gather and analyze EDD occupation/industry matrix to identify occupations that are available in significant numbers in the region.
  - Gather and analyze the O\*NET and BLS data to identify occupations that:
    - Require medium-skilled labor that can be trained locally.
    - Provide a range of living-wage jobs with a clear path to advancement.

- Gather and analyze data on replacement job openings and opportunities.
- Utilize the BLS data on education, training and experience pathways to good jobs.
- Summarize data to propose and identify Occupations of Opportunity.
- Describe projected growth in occupations at the regional and subregional scale.
- Analyze and identify Industries of Opportunity:
  - Identify which of the region's current portfolio of industries employ workers in Occupations of Opportunity in significant quantities.
  - Identify which of those industries can be located in transit accessible areas, based on facility type, labor force access and existing subregional distribution.
- Summarize existing forecasts of Industries and Occupations of Opportunity.

### 3.2 (b) Profile of LMI Workers Regionwide.

Specific activities:

- Gather data from the LEHD, ACS and Equal Employment Opportunity as needed, about where LMI workers live and work as well as additional demographic factors.
- Gather existing set of definitions of high-need areas throughout the region. These will include MTC's Communities of Concern, BAAQMD's Community Air Risk Evaluation (CARE) communities, and other definitions.
- Explore the overlap across all these definitions and share with MTC and the EPWG and EC to develop a common definition of high-need areas.
- Produce maps of LMI workers and their relationship to regionally-defined high-need areas.

### 3.2 (c) Areas/Job Centers of Opportunity.

Specific activities:

- Using the NETS data, identify existing places with high concentrations of Industries and Occupations of Opportunity. The SPUR team shall incorporate as appropriate ABAG's analysis of areas for future employment growth. These places will be defined as those areas that:
  - Are accessible on regional or high capacity and frequent local transit;
  - Have a concentration of either Industries or Occupations of Opportunity;
  - Currently employ significant numbers of LMI workers.
  - Have other factors to be determined in consultation with MTC and/or EPWG.
- Identify the overlap between these areas, where LMI workers live and work and the regionally defined high-need neighborhoods identified in 3.2 (b).
- Map a select set of the job centers of opportunity and describe the transit connections and gaps to and from them.
- Identify the land use needs of the targeted Industries and Occupations of Opportunity.
- Explore locations in the region that provide major opportunities to accommodate new growth in the Industries and Occupations of Opportunity.
- Identify zoning or land use barriers to growth of Industries of Opportunity, including use of existing land capacity analyses produced by local or regional agencies as part of Plan Bay Area and local PDA assessments.
- Produce maps showing the region's areas/job centers of opportunity.

### 3.2 (d) Commute and Job Access.

Specific activities:

- Gather existing material and data on regional commute patterns, particularly as they relate to the LMI community.
- Use LEHD data to identify common commute patterns among low and moderate income workers.
- Produce maps showing common commute patterns and identifying particular high cost or high length commutes.
- Describe the specific barriers facing LMI workers navigating a regional transit system with 27 separate transit operators and no common fare policy or schedules.

### 3.2 (e) Barriers and Challenges to Job Creation and Job Access.

Specific activities:

- Summarize the barriers to job creation and job access based on the mapping and analysis in tasks 3.2 (a-d). This will include barriers such as commute distance or cost as well as transit access. It could also include barriers such as local zoning and support, land capacity and availability.
- Produce summary memo based on this material.
- Produce presentation material to be shared with the various working groups and outreach meetings.

### ***Task 3.3: Summary of Results***

The SPUR team shall summarize the results of all the analytic work in Tasks 3.1 and 3.2 with the outreach, interviews and stakeholder convenings in Tasks 2.2 and 2.4. The major outcome of this task is a report and presentation that is clear and concise yet comprehensive. This report will form a chapter of the final strategy focused on barriers and challenges.

*Specific activities:*

- Summarize the barriers to job creation and job access as identified in Tasks 2.2 and 2.4.
- Combine these barriers with the summary of material in Task 3.2 (e) to produce a single document.
- Produce draft summary report and share with the EPWG, EC and SC.
- Produce final report and presentation.
- Catalog all maps from 3.2 as part of a data library that is publicly accessible.

*Task 3 Budget:* \$112,032.

## **Task 4: Economic Prosperity Strategy**

A good economic development strategy is not a document but a reflection of actions that stakeholders involved in its development are ready and willing to implement. In some cases implementation of the strategy may begin during the outreach phase. This is because the focus of the outreach is on convening the marketplace of firms, education providers, CBOs, workforce development groups, transit providers and other key stakeholders who can together make changes that directly benefit LMI residents.

Tasks 4.1 and 4.2 will begin during the outreach phases while 4.3 and 4.4 are more the culmination of the entire project.

### ***Task 4.1 Best Practices Analysis***

*Specific activities:*

- Beginning during Round Two of the outreach, the SPUR team shall begin to identify best practice solutions to reducing barriers for LMI residents. The SPUR team shall consider ideas from a range of fields, including business, education, transportation, government and technology as well as directly within existing economic and workforce development institutions. The SPUR team shall use its network in other regions of California and elsewhere in the United States to identify strategies that might be applicable in the Bay Area.
- The SPUR team shall draft summaries of the best practices that directly address barriers identified elsewhere in this project.

*Deliverable:*

- Memo on best practices.
- Presentation and outreach material.

### ***Task 4.2 Regional Scan of Applicable Strategies***

The SPUR team is already participating in some of the ongoing strategies to better connect LMI residents to quality jobs in the region. In this subtask, the SPUR team shall use their existing knowledge as well as conduct new research to identify effective and potentially replicable strategies being implemented in the Bay Area.

*Specific activities:*

- Identify information about applicable strategies being implemented during stakeholder interviews and the outreach rounds.
- Gather additional information or research as necessary on these actions to see if they could be scaled up to form a larger part of the overall strategy.

*Deliverable:*

- Memo on applicable strategies.
- Presentation and outreach materials.

### ***Task 4.3 Draft Economic Prosperity Strategy***

*Specific activities:*

- The SPUR team shall summarize the outcomes of all prior work into a draft strategy.
- The strategy will also include a proposed framework for Pilot Projects. SPUR shall present the draft strategy for feedback from the EPWG, SC, and EC.
- The strategy will then be shared with ABAG and MTC Project Manager as well as presented to the EPWG, EC and SC.

*Deliverable:*

- The SPUR team shall produce a draft of the final strategy.

### ***Task 4.4 Final Economic Prosperity Strategy***

*Specific activities:*

- The SPUR team integrate the key findings of the analysis and outcomes from the stakeholder convening into a strategy document that is user-driven and market-focused and can be publicly disseminated as a 'living document' (not simply a plan). This document will be designed for popular reading, and will emphasize how collaborative actions are the key to achieving greater regional equity.

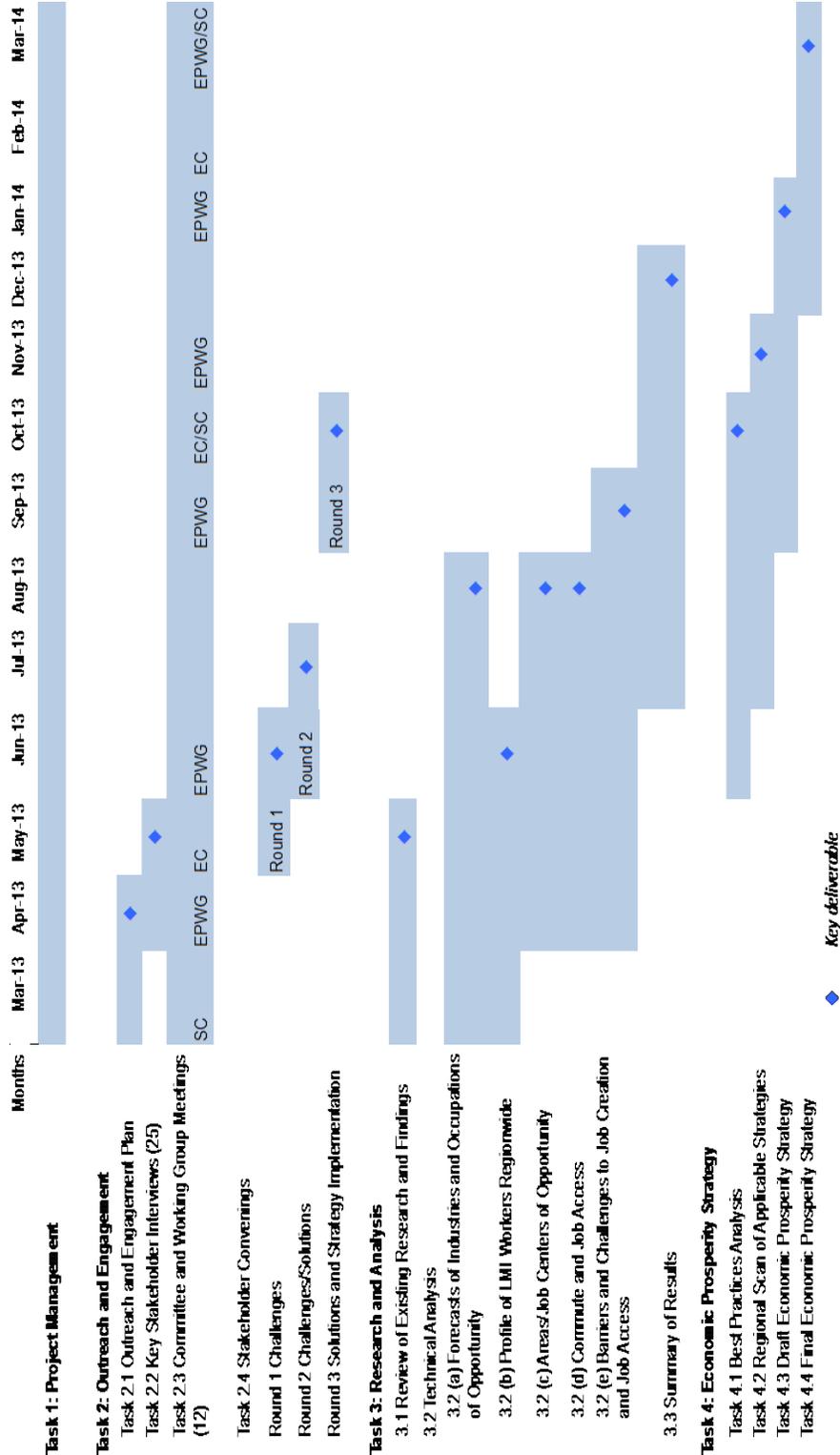
*Deliverable:*

- Draft and final Economic Prosperity Strategy.

*Task 4 Budget:* \$105,561.

**Anticipated Project Completion Schedule and Preparation of Work Products**

Note: Below is a chart showing the anticipated phasing of tasks and activities. This schedule may be modified as necessary during the implementation of this project.



## Section III. Cost Proposal

The overall budget is \$450,000. The following is the proposed costs per task and subtask:

Task 1	\$44,146
Task 2	\$188,262
Task 3	\$112,032
Task 4	\$105,561

1 Project Management	\$44,146
2.1 Outreach and Engagement Plan	\$21,935
2.2 Key Stakeholder Interviews (25)	\$22,642
2.3 Committee and Working Group Meetings (12)	\$36,780
2.4 Stakeholder Convenings (up to 21)	\$106,904
3.1. Review of Existing Research and Findings	\$21,970
3.2 Technical Analysis	\$62,871
3.3 Summary of Results	\$27,191
4.1. Best Practices Analysis	\$23,398
4.2 Regional Scan of Applicable Strategies Being Implemented	\$15,003
4.3 Draft Economic Prosperity Strategy	\$36,227
4.4 Final Economic Prosperity Strategy	\$30,933