Great Communities Collaborative | Five-Year Strategic Plan, 2011-2016

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Five-Year Strategic Plan, 2011-2016

TABLE OF CONTENTS

ACKNOWLEDGMENT

INTRODUCTION

The Great Communities Collaborative (GCC) was formed in 2006 to work towards a future where mixed-income transit-oriented communities would become prevalent in the Bay Area. The founding organizations, described as core partners, shared an awareness that the region's trend of growing by sprawling was socially and environmentally unsustainable. Currently, there are seven core partners: Greenbelt Alliance, Non-Profit Housing Association of Northern California, TransForm, Urban Habitat, Reconnecting America, The San Francisco Foundation, and the Silicon Valley Community Foundation. The East Bay Community Foundation co-envisioned and managed the GCC as a core partner for four years since the beginning. In 2010, EBCF chose to taper its role in the management and financial support of GCC. The strength of the GCC core partners is complemented by the expertise of grassroots community organizations that work within specific communities, and by technical assistance providers who create tools and provide additional expertise on issues like community health and mixed-income housing, totaling 27 organizations.

Each member brings key issue expertise, geographic diversity, and diverse constituencies. The partners share a commitment to the notion that the Bay Area's transit-rich neighborhoods should have a mix of jobs, shops, community services and amenities, as well as homes affordable to families of all income levels. This is often termed *sustainable and equitable transit-oriented development* (TOD). One key aspect of TOD is the ability for people of diverse incomes, particularly very-low and low-income people, to stay or relocate near quality public transportation to reap the benefits of TOD, which include reduced transportation costs, improved jobs access, economic opportunity and other critical services and amenities. Creating these types of places at the scale envisioned by the GCC and the region's planning agencies, the Association of Bay Area Governments (ABAG) and Metropolitan Transit Commission (MTC), will require good plans that provide a guiding vision and goals for neighborhoods, and a range of implementation tools, strategies and financial resources that will ensure that vision can become reality.[2]

Key GCC Accomplishments

The GCC has worked in over two dozen communities throughout the nine-county Bay Area and demonstrated that when residents are deeply involved in shaping the future of their cities, a broad range of benefits related to equity and the environment can be created. In each site we work to overcome barriers that have prevented low-income residents and residents of color from engaging in planning and decision making. GCC accomplishments include the following:

- GCC partners have helped 25 communities work with their local governments on either drafting or completing Station Area Plans (SAPs)[3]. The SAPs that resulted from the process in which the GCC was

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[2] A glossary is provided in the appendix that provides descriptions of the agencies referred to in the plan and definitions of key terms.

[3] The Metropolitan Transportation Commission has a Station Area Planning grant program to fund city-sponsored planning efforts for the areas around future transit stations. The SAPs that are funded (a range of $250,000–$750,000) are intended to address the range of transit-supportive features that are necessary to support high levels of transit ridership. Usually, the GCC is working in the same places and in parallel to cities' SAP processes (up to ten each year).

involved were passed by city councils with unprecedented degrees of density, affordable housing, community amenities such as childcare and parks, and in some cases local-hire provisions.

- As a result of the success shown in the SAP program, the agencies tripled their financial commitment from $7 million to $21 million for local planning in the past five years, recognizing the sites where the GCC works as examples of best practices.

- GCC was instrumental in catalyzing an initial $10 million grant from MTC that led to the creation of the Bay Area Transit-Oriented Housing Fund. The fund will provide low-interest loans to developers of affordable housing in strategic locations with excellent access to public transit. The fund is managed by a consortium of six Community Development Finance Institutions (CDFIs). They are the Low Income Investment Fund, Corporation for Supportive Housing, Enterprise Community Partners, Local Initiatives Support Corporation, Northern California Community Loan Fund, and Opportunity Fund. Initial investors include these six organizations, plus MTC, Citi Community Capital, Morgan Stanley, the Ford Foundation, Living Cities, and The San Francisco Foundation. The fund was launched in March 2011 and is now capitalized at $50 million.

The Bay Area is considered a statewide and national example of good planning practice and as a place to watch for its potential for innovation. The GCC has grown, fostering change at different policy levels and generating success stories for the transit- oriented development field. Participants have shared the GCC's stories and lessons to inform partnerships around the country. But as the challenges and opportunities of our region became even clearer, we found ourselves struggling to meet our potential as a collaborative. In March 2010 the GCC decided work on a strategic plan that would better weave together its work to achieve greater regional impacts and establish a fresh governance structure to better manage information and decisions.

OPPORTUNITY STATEMENT

The Challenge
By the year 2035, the population of our nine-county region will rise from about 7 million today to close to 9 million. The question is not *if* the Bay Area will grow; the question is *how* will our region grow? The Bay Area is regularly listed with Los Angeles, Houston, and Atlanta as among the regions with the nation's worst traffic. Many of the region's most sensitive landscapes and best farmlands have been lost to sprawl development. Rural, suburban, and urban communities, regardless of size, need to create walkable, healthy communities in their town or city center to keep development pressure off of open space and working farms on the edge.

When there is sprawl, many people express concerns over the loss of cherished farmland and open spaces. But no one *feels* the negative impacts of sprawl like California's low-income communities and communities of color. These populations have been largely cut off from opportunities to live in affordable, walkable and healthy communities. The region's median home price —over $400,000— means that only about 10% of Bay Area families earn enough to afford a home. People are caught between two pressures: looking to move further away from where they live in the transit corridors and communities in the region, or fighting to be able to stay where they are.

If families with low incomes want to relocate to the suburbs they do not have the option to choose a place where affordable homes and reliable transportation coincide. It is rare that suburban places have reliable public transportation to allow for access to jobs, health care, education and other essential activities so generally people need to own a car. While owning a car can improve access for families, it increases transportation costs to an average of 29% of income for low-income families, leaving little left for healthy food, education, and savings.

Because of a growing demand by people of all incomes —especially middle and upper ones— to live in compact communities near transit, there are few communities like this left in the Bay Area that remain affordable to people

with low incomes. The ones that do remain are vulnerable to becoming completely unaffordable, so they must be planned for a mix of income levels, especially low income. Meanwhile, the increasing attractiveness of places near transit, even before planning processes and public improvements begin, increases land values and prices people out. Now where should they go?

Our Opportunity
There is fertile ground for nurturing a new model for how our region can grow that enables residents to turn their cities into truly great communities – walkable, mixed-income neighborhoods with affordable homes near transit, jobs, and services.

- There is market demand. Consistent with the "rebirth of the city" phenomenon that is sweeping similar strong-market regions throughout the nation, about one-third of housing demand in the Bay Area is for homes in urban-style neighborhoods where walking is a viable option and accessing transit is easy.

- There is public will. Of the $16 billion Bay Area voters approved for transportation infrastructure since 2000, $12 billion is dedicated to improving and expanding public transit instead of building more sprawl-inducing roads and highways. People are choosing to ride the rails rather than sit in traffic.

- There is regional and local government leadership. The Metropolitan Transportation Commission (MTC) established a first-in-the-nation policy requiring local governments to plan for minimum levels of housing near new transit stations. MTC is providing funding to select communities for the planning of these station areas, and many city councils in the region have adopted inclusionary zoning policies to ensure new affordable homes are built.

- There is nonprofit leadership. High functioning regional nonprofits and foundations are raising the bar for what the sectors can do together to achieve triple bottom lines for equity, the environment and the economy through progressive planning and development practices.

- There is action at the state level. California adopted landmark global warming legislation, including the Global Warming Solutions Act (AB 32) and Senate Bill 375 (Steinberg), which requires the state to set greenhouse gas reduction targets for each region and that each also adopt a "Sustainable Communities Strategy" (SCS) or an "Alternative Planning Strategy" (APS) that will be a plan for reach the targets. The SCS must be an integrated transportation and land use plan that will meet the region's greenhouse gas reduction targets and provide homes for all participants in the region's economy.

The convergence of these conditions has fueled a spike in the number of Bay Area cities planning for TOD. Since 2006, through their Station Area Planning (SAP) grants, MTC has invested in planning for 30 TODs around existing and proposed Bay Area transit stations to create neighborhoods complete with homes, shops, job centers, and community services. Now, seven of those plans are complete. In 2006 MTC's grant program was set to be $2.5 million; however, the agency recognized the program's success, particularly in sites where the GCC worked, and the budget was increased to $20 million. By being proactive and planning for affordable housing and community services, and by putting mechanisms in place to prevent displacement of existing residents, transit-oriented development can help overcome a history of disinvestment in low-income neighborhoods and communities of color. Thus, both long-term residents and new residents will share in the benefits of the new amenities and investments associated with TOD.

THE STRATEGIC PLANNING PROCESS

The overall goals of the strategic planning process were the following:
1. Develop clarity around the extent and limits of GCC's existing mission, and refine the mission if necessary.
2. Identify GCC's strategies and priorities for the next 5-10 years.
3. Revise our governance structure and decision making processes.
4. Develop a partnering, staffing, and resource plan for achieving the strategies and priorities.

4

The process called for an inclusive approach involving the seven organizations that included the core partners plus a broader community of stakeholders. A San Francisco-based firm, Teamworks, was commissioned to design and facilitate the planning process which began in August 2010 and concluded in April 2011.   Below are the key components of the process.

Strategic planning committee (SPC): First, a strategic planning committee was created, comprised of three GCC executive directors, plus the GCC initiative officer. Members wrote and approved a "job description" of their tasks.

Stakeholder input: A set of interviews was carried out with GCC's executive directors, local community foundation and national funders, local nonprofit organizations that have worked with the GCC implementing projects, Bay Area policymakers, and its evaluator. Surveys were sent to technical assistance providers and other local groups to deepen input from grassroots organizations.

Principal Meetings: There were three full-day retreats and several two to three hour meetings. Meetings were open to representatives from GCC's nonprofits and community foundations, unless they were specified to be exclusively for nonprofit executives. The following was the sequence and purpose of each meeting:

1. Nonprofit executives' meeting (October 2010): An initial discussion of stakeholder findings, change processes and the role of organizational culture, expectations of strategic planning and affirmation of the commitment to fully participate in the strategic planning process.
2. First retreat (November 2010): A discussion of stakeholder findings and implications, the net value of the GCC, vision and mission, and initial brainstorming of the theory of change.
3. Second retreat (January 2011): A discussion of the theory of change, including assumptions, key components, goals and strategies.
4. Core partner meeting (February 2011): Presentations of recommendations from review of stakeholder findings and the findings from the governance research.
5. Nonprofit executives' meeting (March 2011): Initial review of governance scenarios, key agreements regarding role and openness of GCC and the decision approach to complete the strategic planning.
6. Third retreat (March 2011): A discussion of key activities to implement the goals and strategies for local policy and planning, convening/research, and for finance, preliminary discussion of regional activities, presentation and discussion of alternative governance scenarios.
7. Mini-retreat (March 2011): A half-day meeting devoted to regional activities and governance.
8. Community foundations (February/March 2011): Meetings with representatives from The San Francisco Foundation and the Silicon Valley Community Foundation about the evolving strategic plan and its relationship to the foundations' priorities.

Task Forces: Task forces were formed with a written description of expectations. Each had specific goals, a timeline and deliverables. All GCC executives, staff, and funders participated in at least one or more task forces, which capitalized on the expertise of the participants and fostered buy-in. The following task forces were created:

1. Vision/Mission – to fine tune the vision and mission.
2. Eyes, Ears, Mouths – to develop recommendations from the stakeholder input.
3. Theory of Change/Strategic Framework – to draft the theory of change.
4. Get Smart on Governance – to conduct research to learn how other collaboratives are governed/managed and to identify best practices.
5. Getting Even Smarter on Governance – to draw upon the best practices research and GCC's experience to (1) first develop alternative scenarios, and (2) based upon input from the core partners to the scenarios to draft the preferred governance model.
6. Organizational Culture and Communications – to develop a strategy to further refine GCC's leadership, communications, and consensus-building capacities.

7. Local Policy and Planning – to take the stated goals and strategies and identify activities for implementation.
8. Convening and Mobilizing – to take the stated goals and strategies and identify activities for implementation.
9. Finance Tools – to take the stated goals and strategies and identify activities for implementation.
10. Regional Policy and Planning – to take the stated goals and strategies and identify activities for implementation.

Development of Measures: Once the key activities were completed, the GCC's independent evaluator, Blueprint Research + Design, Inc., consulted with each task force to develop measures, which allowed for building in agreed-upon measures to position the GCC to have a shared language for talking about progress toward meeting goals.

Decision-making process: The steps in the decision process included (1) developing a shared knowledge base, and (2) breaking down the planning into bounded components, each of which was put on a track for consent by email. Core partners were given three days to complete their review of the vision/mission, theory of change, key activities, and governance.   The consent process allowed for a "red flag," i.e.,, where a core partner could signal a significant issue that stood in the way of consensus. Were a red flag to occur, the process included a step for hearing the issue and moving to resolution through either consent or majority vote.

Final Document: A set of interim products by the task forces was produced. Once all of the products passed through the consent process they were assembled and underwent some polishing to create a final document with a clear story line authored by the core partners.

VISION AND MISSION

Vision
The Great Communities Collaborative envisions a socially, economically, and environmentally sustainable San Francisco Bay Area where all people are able to shape the future of their communities. By working together, we can ensure that our region is made up of healthy, thriving neighborhoods that are affordable to all and well connected to regional opportunities by a premier transit network.

Mission
The Great Communities Collaborative is a group of organizations dedicated to ensuring that the San Francisco Bay Area is made up of healthy, thriving neighborhoods that are affordable to all and linked to regional opportunities by a premier transit network. We connect local residents with the tools and resources they need to influence decision making, forge diverse partnerships to craft lasting strategies and harness the means to help move visions to reality.

THEORY OF CHANGE — GOALS/STRATEGIES/ACTIVITIES

A theory of change (TOC) was developed to articulate what it will take to achieve the GCC's vision and mission. The TOC contains four elements: Local Policy and Planning, Regional Policy and Planning, Convening and Mobilizing, and Finance Tools. Each element includes a specific goal, strategies, and key activities to guide GCC's work in this area. The graphic intentionally depicts the areas of work as overlapping. For example, issues and opportunities in the policy work identify the need for specific research to convene interested parties to determine how to best carry out the work.

Taken together, these elements are the most critical for the GCC to advance sustainable and equitable TOD at scale in the Bay Area. Over the collaborative's first five years, most of its efforts were focused on local policy and planning. By explicitly recognizing and identifying the other three elements, GCC will be better positioned for achieving its vision and mission. The Governance and Management section explains that the four areas of work are expected to be managed by GCC staff with a small program committee. Indicators of success are described at the end of each area. The appendix includes notes that provide important context that will inform transition planning and development of work plans.
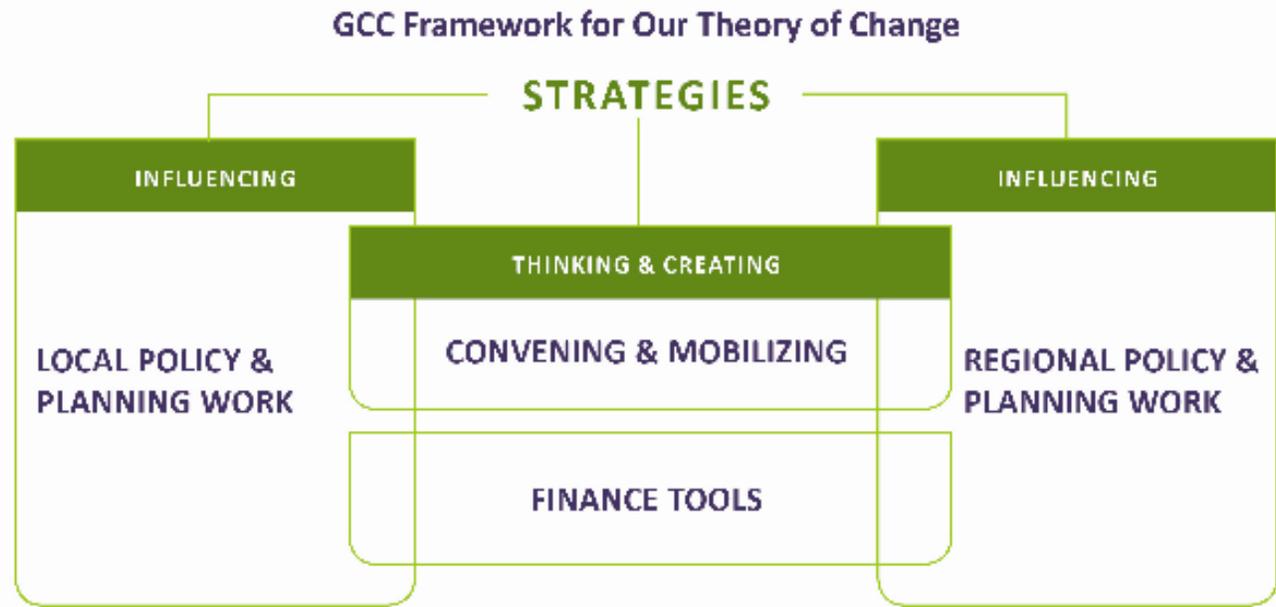
Local Policy and Planning

With five years of experience in local policy and planning, the collaborative reflected on GCC's past work, considered the ongoing information from our formal evaluation, and researched alternatives to be well poised to achieve the following goal:

> The Bay Area grows so that most people have the opportunity to live within a half mile of a transit station or major bus corridor. We want to ensure that the growth of new and existing transit-oriented developments improve the quality of life of residents by providing affordable housing, improving access for people of all incomes to amenities, services, and jobs, and by working to protect the option of existing resident to be able to choose to remain in the community. The ultimate goal of promoting TOD as a strategy for accommodating growth is to increase transit use, reduce driving and reduce pressure to develop open space.

The strategies provide a balance between identifying new opportunities, enhancing current work underway, and continuing to bring the cutting edge in innovative policy solutions to the challenges that create barriers to transit-oriented development. The principle of engagement with the local community remains an essential part of this work, and the strategies described below are refined to ensure better use of the resources that the collaborative can bring to a community. These strategies will allow effective partnership with relevant players – from local community leaders to elected decision makers, to planners and developers working on implementation.

Local Policy and Planning: Strategies and Activities

1. Continue efforts to create, influence, enhance and adopt local level station area/corridor plans.

    a. Recruit and partner with a local organization or stakeholder who is rooted in the community that is invested in planning and development activity or has the potential to be invested, has local connections and has capacity to influence.
    b. Ensure that local organization is provided with adequate resources to fully engage and influence the planning process.
    c. Work with local partners to assess technical needs and connect with the best resource providers to fulfill those needs.
    d. Keep a keen eye on the region for potential opportunity sites.
    e. Site leads work on the ground in collaboration with local partner and other key allies to bring knowledge and support to achieve campaign goals.
    f. Site leads have access to training and assistance to build their skills and capacity to work with communities on planning and development projects.
    g. Encourage cities to create and secure funds for planning potential TOD sites.
    h. Ensure that TOD plans benefit existing community's transit/housing/job needs and do not lead to displacement of residents by working closely with locally-focused partners and expertise in areas of brownfield remediation, employer attraction strategies, economic development, displacement prevention, etc. to assess needs and develop and implement appropriate policies.
    i. Organize regular meetings or events where GCC site leads and local partners have the opportunity to exchange strategies, ideas, and information about their individual campaigns.
    j. If there is an area where a planning process needs to happen to spur TOD, but it will not happen without our involvement, the GCC will consider working with a local jurisdiction to fundraise to initiate the process.

2. Influence and inform implementation of select local level plans by engaging in adoption/amendment of local level policies; activities provide examples of policies to influence. Local teams will assess local policies that need changing.

    a. Ensure that a city's affordable housing policies are appropriate for achieving plan goals by influencing housing elements, inclusionary zoning ordinances, affordable housing overlay zones and other related policies to enhance a city's ability to provide affordable housing for existing and future residents, locally and regionally.
    b. Ensure that the TOD plans include community benefits, local hire policies and other job-related policies that enhance local economic development goals that help people at all income levels.
    c. Ensure that plans incorporate access to parks and green space for residents as well as convenient and affordable transportation options (e.g., bike, walk, transit).
    d. Ensure that parking policies, density regulations, and other related policies encourage walkable, compact developments.

3. Support specific development proposals.

    a. Assess each individual organization's existing endorsement program and determine how they can be engaged to support specific development proposals.
    b. Work with developers and advocates to implement the most effective ways to support development proposals that meet the goals of the GCC.

4. Monitor sites where the GCC is working, and provide ongoing technical assistance and support to community-based groups to ensure local support for sustainable and equitable TOD.

   a. Work with local and regional allies to identify catalyst opportunities to advance TOD projects through technical assistance.
   b. Provide discrete catalyst support funding for pivotal projects within the planning/implementation process.
   c. Make available a pot of funds that is nimble and can be readily accessed to fund key campaigns and processes as the need arises.

5. Identify and support a locally-focused entity that will hold, defend and implement the vision of each local plan we help pass.

   a. Enhance existing capacity of locally-focused entity to ensure implementation of previously approved plan. In some cases, a different organization or entity may be more appropriate to partner with for the implementation stage of a plan.
   b. Maintain relationship with locally-focused entity through convenings, trainings, all-sites, etc.

6. Catalyze inclusive local planning processes and decision making.
   a. Influence the design of planning processes (by consultants and cities) to enhance participation and inclusivity.
   b. Make planning more appealing to residents and bridging the technical gap between practitioners and citizens and show results to demonstrate the value of planning engagement.
   c. Ensure that communities of color and low-income communities have the opportunity to make land use, transportation and other related decisions that impact their communities and result in healthy and complete neighborhoods.

How we will measure our success in local policy and planning?

➤ Existing and new community residents' access to the benefits of sustainable and equitable TOD is significantly improved as a result of wins from station area/corridor plans.
➤ Cities adopt policies that support GCC regional goals for sustainable and equitable TOD.
➤ Specific development proposals with sustainable and equitable TOD elements that align with GCC's goals are approved.
➤ Local and regional allies working on pivotal campaigns, projects and plans around the region have the technical capacity to support sustainable and equitable TOD.
➤ Local stakeholders ensure true implementation of previously approved plans.
➤ Local and regional allies influence the planning and decision-making processes.

Regional Policy and Planning

In the first five years, most of the collaborative's efforts focused on influencing planning and development in dozens of local sites, selected based on their regional locations, to add up to a regional impact. GCC convened stakeholders on regional issues, catalyzed the Transit-Oriented Affordable Housing Fund, stimulated joint efforts to influence regional issues such as the Sustainable Communities Strategy, and linked groups aiming at state and national impacts. Our future work builds off these successful efforts and creates opportunities to pursue others with additional partners. GCC's Regional Policy and Planning work has the following goal:

Maximize the ability to plan for and implement sustainable and equitable transit-oriented development in communities in the nine-county Bay Area by shaping regional-level policies, plans, and funding priorities and influencing state and federal decisions that impact TOD at the regional and local level.

The GCC will shape regional-level policies, plans, and funding priorities, while also and influence state and federal decisions that impact TOD at the regional and local level. We will achieve the strategies that facilitate linkages among groups and catalyze collaborative efforts to affect regional-scale decisions. GCC will build the field of stakeholders working on regional, state, and national issues that affect the region's ability to plan for and implement sustainable and equitable TOD, thus directly advancing our vision and mission and laying the groundwork for future change.

The advocacy groups that participated in drafting this strategic plan are already involved in a variety of important regional, state, and national policy campaigns. The activities described are not intended to replace that work; they are intended to complement it. The strategies and activities described below aim to bring new partners to those efforts, to improve communications between existing efforts, to identify fresh issues and grow the field of well-informed people prepared to influence policy.

Regional Policy and Planning: Strategies and Activities

7. Build and inform the field of advocacy stakeholders working on regional issues that affect the region's ability to plan for and implement sustainable and equitable TOD in the Bay Area.

    a. Periodically analyze and identify strategic opportunities for policy change or other actions at the regional scale that would significantly advance efforts for achieving sustainable and equitable TOD in the Bay Area.
    b. Conduct regular meetings (i.e., quarterly) to bring together nonprofit groups who want to influence regional agencies (ABAG, MTC, BAAQMD, BCDC). These meetings, open to an array of nonprofits interested in sustainable and equitable TOD in the Bay Area, will facilitate information sharing and networking, discussion and strategy development on timely issues, and will be coordinated by GCC staff.
    c. Develop communications tools (e.g., database, website, listserve, intranet) and cultivate relationships that facilitate better communication among nonprofits that work on issues related to planning and implementing sustainable, equitable TOD in the Bay Area.

8. Coordinate action and foster linkages among groups conducting advocacy on state/federal issues that impact the ability to plan for and implement sustainable and equitable TOD in the Bay Area.

    a. Periodically analyze and identify strategic opportunities for policy change or other actions at the state or federal scales that would significantly advance efforts for achieving sustainable and equitable TOD in the Bay Area.
    b. Use analysis to inform the discussion at the meetings described above and to identify strategic activities that are needed to achieve state or federal-level policy changes of significance to the Bay Area.
    c. Coordinate strategic activities with the existing state/federal collaborations influencing these issues and work through those existing structures when feasible (e.g., Transportation for America, Smart Growth America, ClimatePlan, Housing California, NPH's Legislative Committee, etc.).

9. Catalyze priority collaborative activities that address key Bay Area issues related to planning for and implementing sustainable and equitable TOD.

    a. Where the analysis of opportunities described above identifies the need for coordinated action, GCC will catalyze and incubate new multi-stakeholder activities (e.g., programs, projects or campaigns). These

activities may be responsive to emerging policy issues or may proactively elevate a new issue. The structure, partners and funding associated with this work will differ depending on the nature of each priority activity.

How we will measure our successes with regional policy and planning?

➢ Opportunities to advance sustainable and equitable TOD among regional players (ABAG, MTC, etc.) are collectively identified by GCC and its partners. Information about these opportunities is optimally shared by and among GCC and its partners to support strategy development.
➢ Opportunities to strategically advance sustainable and equitable TOD in the Bay Area, particularly through federal and state legislation and regulation, are collectively identified by GCC and its partners. Information about these opportunities is optimally shared by and among GCC and its partners to support strategy development.
➢ Collaborative campaigns are catalyzed and incubated by GCC that capitalize on opportunities identified and pursued by GCC and its partners.

(For background about the thinking behind regional policy and planning, see page 31 in the appendix.)

Convening and Mobilizing
The GCC has five years of experience convening and mobilizing; however, it was a subset of our other efforts. The results were significant enough that it is recognized among the partners that this work is a distinct activity with distinct methods, and that we need to do more of it. Convening and Mobilizing has the following goal:

> To build the field of equitable and sustainable TOD in the region, establish a comfortable "zone" for all kinds of stakeholders in the field to come together to connect, ask good questions and expand their expertise, and catalyze activities between the scales of work.

For the short term, we aim to convene and mobilize in ways that complement the other bodies of work and advance their measures of success. In the long term, convening and mobilizing will cultivate a strong field of informed and experienced actors seeking ways to advance sustainable and equitable TOD in the Bay Area (and beyond). The activities seek to expand the body of informed and engaged stakeholders in the field of equitable and sustainable TOD in the Bay Area.

These activities will be undertaken in close coordination with the other program areas in the theory of change and specific projects —such as new convenings or research projects— will respond to needs and opportunities uncovered through the local, regional/state/national and finance work. Research and convenings that relate primarily to a GCC site (also currently known as TOD technical assistance) are not included in this section but are addressed in the local policy and planning element. The activities here address an issue or respond to a need that is regional in scale, or address a local issue at a site that is not one of GCC's priority sites.

Convening and Mobilizing: Strategies and Activities

10. Serve as a convener to surface and discuss sustainable and equitable TOD issues among key stakeholders around the region.

   a. Host monthly meetings with 10-12 regional agency staff, regional advocates and researchers to

develop a learning community of professionals invested in building sustainable land use and transportation plans; leverage the collective wealth and talent amongst the participants in a practical and relevant manner; promote and cultivate collaboration and alignment where appropriate. (A current example is the monthly meeting convened by TSFF that brings together advocates from leading regional nonprofit organizations and senior staff from regional agencies, known as the "muffin meetings.")

b. Responding to what is going on at various levels (i.e. , site, city, county), convene or co-convene small meetings with GCC local partners, NPH members, Urban Land Institute, Center for Transit Oriented Development, elected leaders agency, etc.
staff or others to share knowledge, strategize on local campaigns, or evaluate alternatives for TOD plans. (Recent example: TSFF and Transform convened Greenbelt and Silicon Valley Bike Coalition staff and a ULI panel to discuss TOD at Diridon.)

c. Host a twice yearly opportunity for GCC partners and others to share knowledge, challenges, approaches and build the GCC community. There should be fun aspects such as a less formal 'Pecha Kucha'[4] (ideas exchange) and could include "non-local" partners. (Example: All-sites meeting).

d. Co-host (partners TBD) a biennial state of mixed-income TOD conference with 100-120 people, potentially to include an awards ceremony. (Example: Bay Area Equitable TOD conference UC Berkeley's Center for Community Innovation hosted in 2007).

11. Commission select, actionable research about equitable and sustainable TOD when there is a specific need that is not being pursued anywhere else.

a. Initiate research on approximately 1-2 topics each year. The research must have direct application to our work and could tie into the convening work described above. Research should consider the following:

- Be undertaken in a collaborative way, with some level of involvement from a panel of agencies, academics and/or think tanks.
- Result in a report or tool.
- Be adapted into a sharable communication tool such as a PowerPoint presentation, website and/or webinar that many people can use over time.
- Have a dissemination plan from the outset that is developed with as much rigor as the research design.

How we will measure our successes with convening and mobilizing?

➢ The base of support for sustainable and equitable TOD throughout the region among a broad range of stakeholders is strengthened by bringing them together in ways that complement GCC's other strategies.
➢ Research commissioned by GCC results in the development of practical reports and tools that are commonly used by advocates and supporters of sustainable and equitable TOD as well as community members more generally.

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[4] At a Pecha Kucha event, which draws its name from the Japanese term for the sound of "chit chat," people give presentations on a broad range of topics using a simple format: 20 images x 20 seconds each. The topics usually vary greatly and the format keeps presentations moving at a rapid pace.

(For background about the thinking behind convening and mobilizing, see page 32 in the appendix.)

Finance Tools
Plans are useful if they are implemented, and are jeopardized due to the lack of financing –whether for the infrastructure, land, building materials, or human resources it takes to realize TOD.   This area of work has the following goal:

> Increase the flow of and focus existing public and private funding in the Bay Area to support transit-oriented development and TOD-supportive infrastructure.

The strategies aim to create two types of tools: one to expand funding, and the other to improve the focus of existing funding. For all of these activities, we will consistently scan the region to align our efforts where feasible and to avoid duplication.

As with the Transit-Oriented Affordable Housing Fund the GCC catalyzed, we will create new financial resources.   The process to initiate a new fund entails ramping up at a reasonable pace, conducting feasibility studies, cultivating trust with potential partners, and carefully choreographing momentum. The following activities show several of the most promising opportunities to pursue. In each case, select partners who could contribute technical expertise, particular policy expertise, experience with existing finance tools, or resources were asked to join in the endeavor.

Finance Tools: Strategies and Activities

12. Pursue select public and private funding initiatives to support the planning and implementation of equitable and sustainable and TOD-supportive infrastructure.

    a. Explore and potentially incubate and catalyze a housing trust fund (county, or regional or state to be determined - there are different opportunities for each that need to be explored).
    b. Explore and potentially incubate and catalyze a private infrastructure bank for our region for cities, counties and/or developers to borrow loans at low rates and long term terms for the utilities and public works needed to support growth. (This fund would work much like the TOD Fund. An infrastructure bank is being explored for Grand Blvd.)
    c. Engender the possibility for private , high net worth and prominent donor (individual, corporate or institutional) to champion the work.
    d. Continue to encourage agencies focusing their investments on TOD (e.g., ABAG and MTC to continue to expand TLC grants. ABAG, MTC, HUD, EPA, DOT and HCD working to coordinate for Bay Area).
    e. Support and collaborate with regional and city agencies to submit applications for large public or private grants that will advance our vision for the region. (For example, another HUD Regional Planning Grant).

13. Engage in shaping and execution of the TOD Fund.
    a. Provide technical assistance to cities and other community partners to assist them in preparation and implementation of station area and specific property plans for their communities.
    b. Encourage and broker CDFIs to provide technical assistance to stakeholders in GCC sites, and developers planning or assembling financing for a TOD project that has a loan from fund.
    c. Produce a Regional Site Inventory that identifies potential parcels available for TOD development in nine-county Bay Area. This must be done carefully not to exacerbate land costs.

How we will measure our success in developing finance tools?

➢ Public and private funding supporting the planning and implementation of sustainable and equitable TOD is increased and directed in ways that align with GCC's goals.
➢ The TOD Fund provides (and leverages) capital to plan and implement specific projects that exemplify sustainable and equitable TOD.

(For background about the thinking behind finance tools, see page 32 in the appendix.)

GOVERNANCE AND MANAGEMENT

This section provides a blueprint for GCC's governance, which includes (1) an explanation of the roles and responsibilities of the principal decision-making bodies, (2) a visual depiction of the model, and (3) a decision-making matrix that shows which body is responsible for key decisions and how the different levels of the collaborative will interact.

This blueprint was developed over the course of four months of study and deliberation by the core partners. It was informed by our prior work and best practices research and is designed to build upon GCC's close collaboration between the funders and its nonprofit partners, while capitalizing on the unique strengths of each. Going forward, the GCC's Strategic Planning Committee will oversee transition planning.

We developed a model for governance and management based on values we believe will contribute to an effective partnership. We value being strategic, independent, nimble, transparent, accountable and manageable.

We drew upon our experience and best practices of collaborations around the country to guide our thinking. The following best practices are included in the model we developed:

- Board members are individuals representing organizations and serve for defined (and potentially renewable) terms.
- The structure for decision-making prevents or minimizes conflicts of interest.
- There is clarity on who has the authority to make what decisions.
- There are transparent and deliberate pathways of communication for decision-making to all stakeholders.
- There are independent staff.
- There is a clear record of decisions and a high bar set to reopen past decisions.

Governance Model: Roles & Responsibilities
This section provides an overview of the key roles and responsibilities of the Funder Network, Advisory Board, Staff and Program Committees. See the following section for further elaboration of the responsibilities, a matrix that provides more description about the relationships between the different governance bodies, and a description of the process for decision making.

Funder Network
The Funder Network will be comprised of community/local foundations in the Bay Area[5] and private foundations with a local/state/national focus. Given the time/geographic constraints of the national foundation members, we envision that the community/local foundations will play a leading role in this network. Initially, members will include the two

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[5] Initially, the lead community foundations are The San Francisco Foundation and the Silicon Valley Community Foundation.

community foundations that have been GCC core partners, with additional members expected to be added. Selection of those additional members will be made by the Funder Network with significant advice and input from the Advisory Board. The Funder Network will make final decisions about the annual budget of the collaborative and oversee staff and fundraising. In order to reduce the conflict of interest that exists when the regional/national nonprofit organizations make final budgetary decisions, the Funder Network will decide who gets funded for each area of work (for example, possibly by selecting local site leads through an RFP process). The staff must ensure excellent communication between the Funder Network and the Advisory Board. The Funder Network and Advisory Board will meet jointly on a quarterly basis.

Advisory Board

The Advisory Board will be comprised of roughly nine individuals representing organizations that work in the Bay Area on issues that overlap with GCC's mission. Members will serve 2-3 year terms and will include representatives of the five nonprofit groups that have been GCC core partners since its inception in 2006, plus four additional members. Selection of additional members will be made by the Advisory Board with significant advice and input from the Funder Network. The Advisory Board will meet jointly with the Funder Network on a quarterly basis to adopt the annual work plan, agree upon the general fundraising strategy and provide general oversight for the ongoing work of the collaborative. They will be jointly responsible for revisiting the vision, mission, goals and strategies of GCC. Based on proposals developed by staff, the Advisory Board will make recommendations to the Funder Network on the annual budget and the detailed work plan for each program area (i.e., what priority sites/convenings/research will be undertaken each year). The Advisory Board will provide input as needed to the Funder Network on the detailed budget for each program area.

Staff

The staff will provide critical leadership and ensure a high level of communication and continuity between the Funder Network, Advisory Board and Program Committees. They will report to the Funder Network and will be responsible for facilitating meetings, communications (internal and external), developing proposals for the annual budget, work plan and fundraising strategy, and financial oversight, records and bookkeeping. Staff will work closely with the Funder Network on fundraising activities and will participate in and convene the program committees. In close coordination with the members of the program committees, staff will direct the ongoing, day-to-day work of the collaborative.

Program Committees

These four Program Committees will be essential to accomplishing the mission of GCC and to involving a broad network of partners (nonprofit, private and public sector organizations and practitioners from the region) in GCC's work. Program Committees will include GCC staff and two staff members of national/regional partner nonprofits. The Program Committees will ensure that the work plan for each program area is implemented. The committees will engage with additional partners in the following ways:
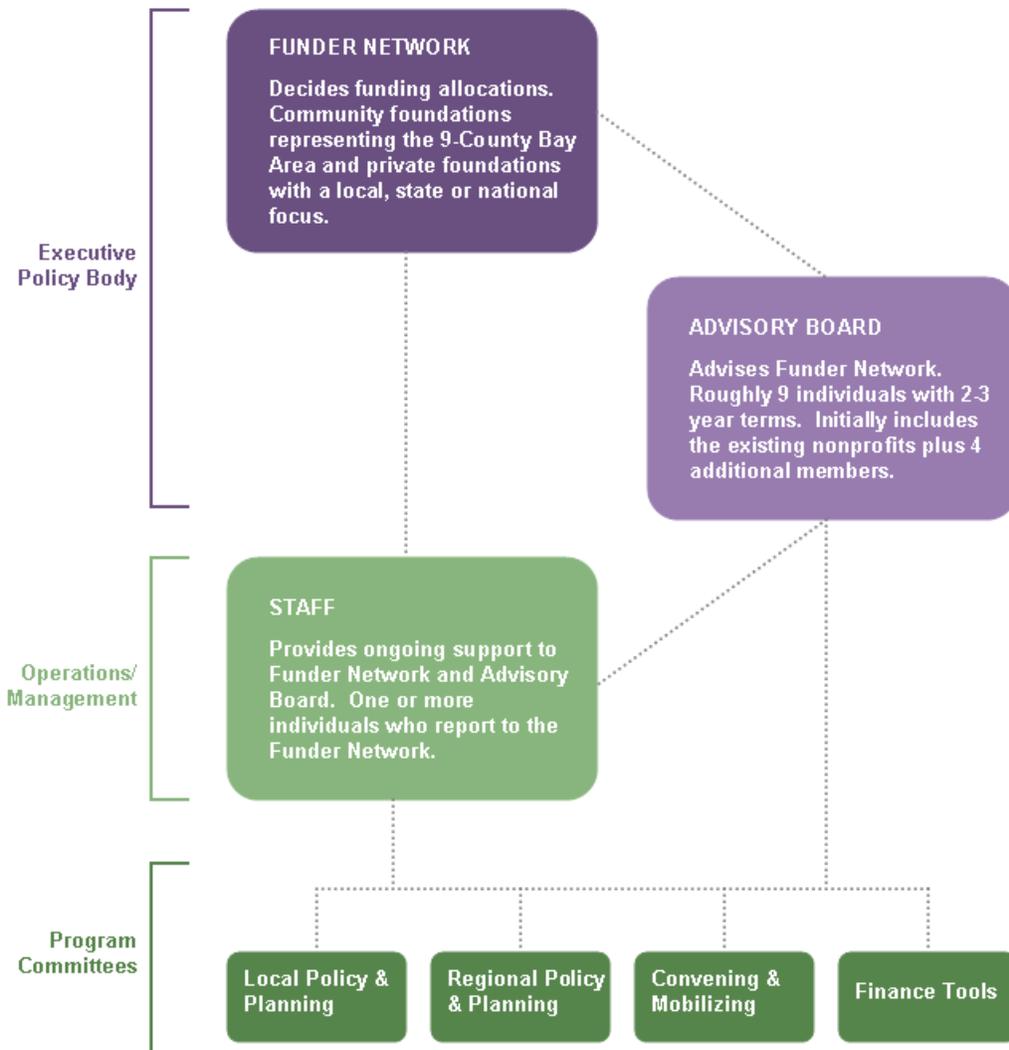
- Local Policy and Planning: This work will be undertaken by a "bounded but permeable network"[6] made up of groups receiving funding to do site work at any given time (similar to current sites group).
- Regional Policy and Planning: This work will involve an "unbounded network"[7] of partners, meaning that it will be open to all interested parties. Smaller, bounded sub-groups may take on specific issue-based campaigns or projects, and which has significant potential to incubate, catalyze, or spin off new collaborations, campaigns, or projects.

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[6] By "bounded but permeable network," we mean a set of people and organizations that at any given time is a known and limited set, but also with the expectation that the members of that set are not fixed; they are expected to change over time.
[7] By "unbounded network," we mean that meeting invites will be sent to all people/groups that we think would benefit from/contribute to the conversation, with the understanding and request that they forward invitations along to other potential participants.

- Convening and Mobilizing: This area will be largely driven by staff and a small program committee, but will engage with additional partners as necessary to carry out activities such as conferences.
- Finance Tools: This area will be largely driven by staff and a small program committee, but will engage with additional partners as necessary to carry out specific activities.

Great Communities Collaborative Governance Model

Executive Policy Body

FUNDER NETWORK

Decides funding allocations. Community foundations representing the 9-County Bay Area and private foundations with a local, state or national focus.

ADVISORY BOARD

Advises Funder Network. Roughly 9 individuals with 2-3 year terms. Initially includes the existing nonprofits plus 4 additional members.

Operations/ Management

STAFF

Provides ongoing support to Funder Network and Advisory Board. One or more individuals who report to the Funder Network.

Program Committees

Local Policy & Planning

Regional Policy & Planning

Convening & Mobilizing

Finance Tools

Decision-Making Matrix

The matrix on the following pages is designed to accompany GCC's new governance structure, based on a similar decision-making tool in 2007 that helped guide GCC's work. This new matrix identifies the most critical decisions that need to be made, key participants, and their role(s). It shows how decisions are finalized, who is responsible for which area of work, and how different groups interact with each other. This matrix should lead to a clear decision-making process and guide our internal communication.

- The matrix is split into eight categories, four for the four broad work areas and four others for operational and strategic efforts. Within each section are a few high-level decisions (Column A). Columns B-D show who develops the initial recommendation, who finalizes the recommendation (or has input into the final rec), and who makes the final decision.
- Where there is "n/a" in a grey box in column C, a decision will move from development of proposal directly to a decision, without an intermediary.
- The word "together" is used very intentionally. By together, we think these decisions may be best made at joint meetings of the Advisory Board and the Funder Network (or at least key members of the Funder Network).

A key part of transitioning to a new governance structure will be putting more detail on these decisions and being clear about who needs to be informed about each decision.

The Great Communities Collaborative's Decision Making System

Type of Decision	Responsible for development of proposal	Responsible for finalizing recommendations	Responsible for making final decision
Long-Term Vision & Strategic Direction			
Revisit vision, mission, goals and strategies. This decision should be at least discussed every three years. At that point, we may (a) initiate a new strategic planning process, (b) update the existing strategic plan, or (c) decide we are on the right track and plan to revisit later.	New Strategic Plan Committee (consisting of members of Advisory Board and Funder Network) working with GCC staff.	Strategic Plan Committee, perhaps with involvement from individual Task Forces	Advisory Board and Funder Network together.
Ongoing monitoring of strategic plan	GCC Staff	n/a	Advisory Board and Funder Network together.
Work plan and Budget			
Create overall "high level" budget -- roughly 6-figure amounts allocated to each broad work area (local site work, regional work, convenings & research, finance) -- and Set priority among broad work areas	GCC Staff using input from Program Committees.	Advisory Board provides input on final draft from staff and makes a recommendation to Funder Network	Funder Network
Set the principles/criteria by which program areas budget and work plan will be developed, including who does what	GCC staff	Advisory Board	Funder Network
Create detailed budget for specific areas of work	Option 1: Program committees. Option 2: Individual groups or small set of groups submit to funders as a proposal.	Advisory Board provides input on proposals and ideas, *not* on specific recommendations of who gets how much.	Funder Network
Create & approve detailed work plan	GCC Staff, compiling input from individual groups charged with each task	n/a	Advisory Board and Funder Network together.

Type of Decision	Responsible for development of proposal	Responsible for finalizing recommendations	Responsible for making final decision
Fundraising			
Overall fundraising strategy	GCC Staff	n/a	Advisory Board and Funder Network together.
What outside foundations to approach	GCC staff coordinating with Funder Network	Consult with Advisory Board as appropriate	Funder Network
General content of proposals	GCC staff coordinating with Funder Network	Consult with Advisory Board as appropriate	Funder Network
Who submits proposals	GCC staff coordinating with Funder Network	Consult with Advisory Board as appropriate	Funder Network
Exact language of fundraising proposals	GCC staff coordinating with Funder Network	Consult with Advisory Board as appropriate	Funder Network
Encouraging expansion of the funding base through networking with other funders	Funder Network	n/a	Funder Network
Where money flows if proposal is awarded	Fiscal Sponsor coordinating with Staff		
Local Work			
Determinations of sites	GCC Staff and Local Site Program Committee	Advisory Board	Funder Network through funding decisions
Strategies and tactics in individual sites	Site team (meaning the people working on an individual site)	Open to input from GCC Staff, Sites Program Committee, and via All Sites meeting	Site team
Expenditures within budget (in individual sites)	Site team	Open to input from GCC Staff and Sites Program Committee	Site team

19

Type of Decision	Responsible for development of proposal	Responsible for finalizing recommendations	Responsible for making final decision
Expenditures outside of budget	Site team	GCC staff	Depends on amount: GCC Staff for amounts up to a certain level (or within a certain annual pool). Funder Network needs to decide higher amounts
Determining local partners	Site team	GCC staff and Advisory Board	Funder Network through funding decisions
Convenings			
Overall topics: What workshops/convenings/research to prioritize developing & funding	GCC Staff with Convening and Research Program Committee	Advisory Board	Funder Network through funding decisions
Development and implementation of convenings/research	GCC Staff with individual groups tasked with the work	Open to input from Advisory Board and Funder Network (together or separately)	Individual groups assigned to work
Financing			
How to develop and prioritize financing tools	GCC Staff with Financing Program Committee	Advisory Board	Funder Network through funding decisions
Development and implementation of financing work	GCC staff with individual groups tasked with the work	Open to input from Advisory Board and Funder Network (together or separately)	Individual groups assigned to work

Type of Decision	Responsible for development of proposal	Responsible for finalizing recommendations	Responsible for making final decision
Regional Work			
Overall topics of what regional work to prioritize developing & funding	GCC Staff with Regional Program Committee	Advisory Board	Funder Network through funding decisions
Convening regional meetings	GCC Staff with Regional Program Committee	n/a	GCC Staff with Regional Program Committee
Identifying who should participate in which meetings	GCC Staff using input from Regional Program Committee, Advisory Board, perhaps others	n/a	GCC Staff
Maintaining list of participating groups	GCC Staff	n/a	GCC Staff
Strategic meetings with regional players to coordinate and encourage support	GCC Staff coordinating with participating groups	n/a	GCC Staff
Proposing catalyst campaigns	GCC Staff with Regional Program Committee	Advisory Board and Funder Network together	Funder Network through funding decisions
Infrastructure and Operations			
Hiring and oversight of GCC Staff	Funder Network	Advisory Board and Funder Network	Funder Network
Financial oversight/management including reporting and audits	GCC Staff	n/a	Oversight by fiscal sponsor
Plan for GCC's overall communications	GCC Staff	Advisory Board and Funder Network	TBD
Design of evaluation tasks	GCC Staff	Advisory Board and Funder Network	Funder Network
Identity of fiscal sponsor	One member of Funder Network	Advisory Board and Funder Network together	Funder Network
Design and implementation of grant management	GCC Staff with Fiscal Sponsor	n/a	GCC Staff with Fiscal Sponsor
Create mechanism for making small funding decisions	GCC Staff	Input from Advisory Board	Funders Network (to decide on process)

**A CHECKLIST OF NEXT STEPS TO TRANSITION
FROM THE CURRENT TO THE NEW PROGRAM AND STRUCTURE**

- ➢ Establish a transition team to carry out the transition

- ➢ Develop and implement transition plan

- ➢ Detail the governance model and hire staff

- ➢ Create and implement communications strategy (for strategic plan and overall for GCC)

- ➢ Develop detailed work plans

- ➢ Develop detailed budgets

- ➢ Develop and execute a plan for organizational culture

- ➢ Fundraise to support the workplan

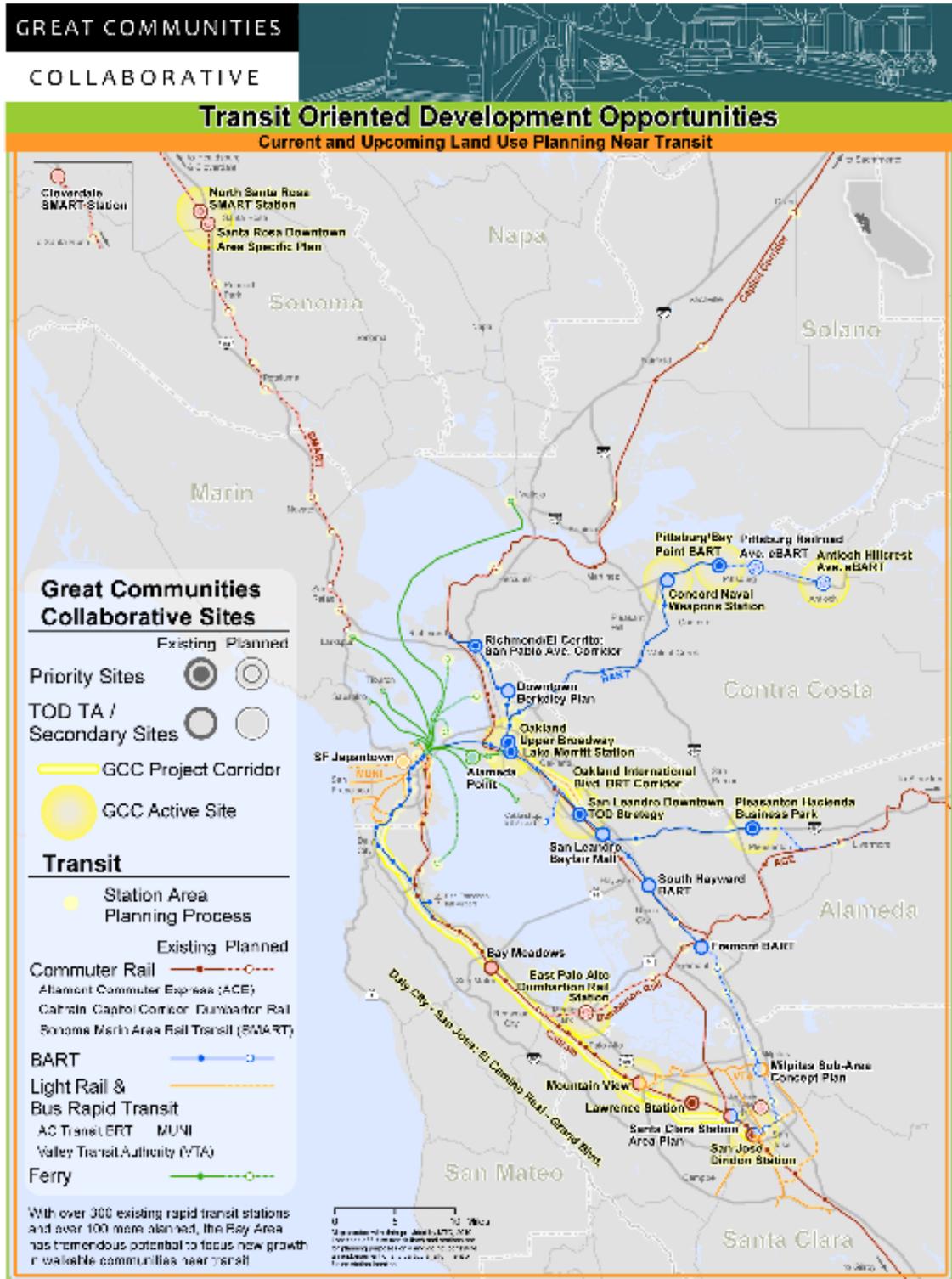- ➢ Monitor the implementation of the strategic plan

APPENDICES

MAP OF BAY AREA WITH GCC'S YEAR 5 LOCAL SITES: 2010-2011

GLOSSARY

PARTICIPANTS

NOTES ON STRATEGIES

ABAG (Association of Bay Area Governments: The regional planning agency for the nine counties and 101 cities and towns of the San Francisco Bay Area.

All-Sites Meeting: A semi-annual convening of GCC core partner organization site leads and their respective Local Partner representatives. The purpose is to provide trainings or presentations on topics of common interest, sharing strategies, networking among local leaders, and site updates.

AQMDs (Air Quality Management Districts): The agency entrusted with regulating stationary sources of air pollution within a given district.

BAAQMD (Bay Area Air Quality Management District): The regional agency entrusted with regulating stationary sources of air pollution in San Francisco Bay Area.

Bay Area Partners: A set of organizations that meet regularly to coordinate campaign efforts to influence the Bay Area's Sustainable Communities Strategy & Regional Transportation Plan. Meetings are coordinated by Greenbelt Alliance, with main leadership from Greenbelt Alliance, Public Advocates, Urban Habitat and TransForm.   The group's e-mail list reaches approximately 50 advocates with various organizations.

BCDC (San Francisco Bay Conservation and Development Commission): A state agency that was created by the California Legislature in 1965 to minimize future unnecessary filling of the Bay. The greatest threat to the San Francisco Bay Area is not that the Bay will get smaller, but that climate change will make the Bay larger and threaten existing communities, public infrastructure and wetlands. In response, BCDC has developed a climate change planning project to identify potential Bay-related impacts of and approaches for adapting to global climate change.

BRD (Blueprint Research + Design, Inc.): BRD is the GCC's evaluator. BRD is a strategy consulting firm that specializes in helping foundations and other philanthropic entities capture, use, and share information in ways that will amplify the impact of their philanthropic thinking and practices. Services and products fall into three interrelated categories: Strategy & Program Design, Organizational Learning & Evaluation, and Philanthropic Industry Analysis.

CDFIs: A certified Community Development Financial Institution is a specialized financial institution that works in market niches that are underserved by traditional financial institutions.

CEQA (California Environmental Quality Act): A statute that requires state and local agencies within California to follow a protocol of analysis and public disclosure of environmental impacts of proposed projects and adopt all feasible measures to mitigate those impacts.

CTOD (Center for Transit-Oriented Development): A national nonprofit effort that provides best practices, research and tools to support market-based transit-oriented development.

DOT (Department of Transportation): Federal agency that works to ensure a fast, safe, efficient, accessible and convenient transportation system that meets vital national interests and enhances the quality of life.

EPA (Environmental Protection Agency): Federal agency that works to protect human health and the environment, by writing and enforcing regulations.

EPA: East Palo Alto, California

Field Building: The work of the GCC in creating equitable and sustainable transit-oriented developments cuts across fields such as transportation, housing, environment, civic engagement and organizing. We focus the field on equitable and sustainable transit-oriented development –across sectors and people contributing to it whether they are advocates, researchers, decision makers, community members or funders. To build the field means to deepen the work, connect the people and organizations advancing it and share knowledge about what works.

Greenbelt Alliance: Greenbelt Alliance's mission is to make the nine-county San Francisco Bay Area a better place to live by protecting the region's greenbelt and improving the livability of its cities and towns. Greenbelt Alliance works through public policy development, advocacy and education, in partnership with diverse coalitions.

HCD (Housing & Community Development): California state agency that administers programs that award loans and grants for the construction, acquisition, rehabilitation and preservation of affordable rental and ownership housing, homeless shelters and transitional housing, public facilities and infrastructure, and the development of jobs for lower income workers.

HUD (Department of Housing and Urban Development): Federal agency responsible for national policy and programs that address America's housing needs, improve and develop the Nation's communities and enforce fair housing laws.

MTC (Metropolitan Transportation Commission): The regional transportation planning agency and metropolitan planning organization (MPO) for the nine-county San Francisco Bay Area.

NPH: The Non-Profit Housing Association of Northern California is the collective voice of those who support, build and finance affordable housing. NPH promotes the proven methods of the nonprofit sector and focuses government policy on housing solutions for lower income people who suffer disproportionately from the housing crisis.

PDA (Priority Development Area): Locally-identified, infill development opportunity areas within existing communities. They are generally areas of at least 100 acres where there is local commitment to developing more housing along with amenities and services to meet the day-to-day needs of residents in a pedestrian-friendly environment served by transit. To be eligible to become a PDA, an area has to be within an existing community, near existing or planned fixed transit or served by comparable bus service, and planned for more housing. PDAs are established as part of the FOCUS program, a united effort of four regional agencies (ABAG, MTC, BAAQMD and BCDC) to link land use and transportation

PDC (Priority Conservation Area): Priority conservation areas are areas of regional significance that have broad community support and an urgent need for protection. These areas provide important agricultural, natural resource, historical, scenic, cultural, recreational, and/or ecological values and ecosystem functions.

Pecha Kucha: A forum where people give presentations a broad range of topics using a simple format: 20 images x 20 seconds each. The topics usually vary greatly and the format keeps presentations moving at a rapid pace. Coined from the Japanese term for the sound of "chit chat."

Prop 1C: Proposition in California State Election of November 2006 establishing the Housing and Emergency Shelter Trust Fund Act which aimed at providing housing for needy families, seniors and military veterans. The proposition included funding available for affordable transit-oriented development projects.

Reconnecting America: Reconnecting America helps transform promising ideas into thriving communities, where transportation choices make it easy to get from place to place, where businesses flourish, and where people from all walks of life can afford to live, work and visit. Reconnecting America links people to the places that matter.

Regional: The Great Communities Collaborative is focused on the nine-county San Francisco Bay Area. The collaborative's work is done with the intent of having a regional impact. For example, the local sites in which GCC engages are chosen strategically so that, together, the impact of the local site work is regionally significant. A similar regional strategic analysis will apply to GCC's work in the financing and convening realms and, of course, the regional policy and planning realm.

RWQCB (Regional Water Quality Control Board): The San Francisco local regional water board that implements policy and regulations, develops long-range plans for the areas, issues waste discharge permits and takes enforcement actions against violators. Part of the California water boards department that protects and enhances the quality of our state's waters, develops statewide policy and regulations for water quality control, and allocates water rights.

"**Six Wins for Social Equity**": A coalition of social equity, environmental justice and health organizations that work on the Sustainable Communities Strategy & Regional Transportation Plan to support clean & healthy communities, quality jobs, affordable housing, regional land use/transportation investments without displacing existing communities, community empowerment, and affordable & reliable transit for those that depend on it.

SVCF: Silicon Valley Community Foundation: The mission of the Silicon Valley Community Foundation is to strengthen the common good, improve quality of life and address the most challenging problems. We do this through visionary community leadership, world-class donor services and effective grantmaking.

TLC (Transportation for Livable Communities): MTC's program to support community-based transportation projects that bring new vibrancy to downtown areas, commercial cores, neighborhoods, and transit corridors. TLC provides funding for projects that are developed through an inclusive community planning effort, provide for a range of transportation choices, and support connectivity between transportation investments and land uses.

TOD (transit-oriented development): Characterized by compact, higher density buildings and multiple transportation choices, a variety of housing, jobs, shops, services, and amenities in the area within half-mile (or 10-minute walking) distance surrounding a transit station. The GCC's definition and references to TOD emphasize that it is expected to be both sustainable and equitable.

TOD Fund: Also known as the Bay Area Transit-Oriented Affordable Housing (TOAH) Fund. This revolving loan fund provides financing for land acquisition at favorable terms for affordable housing development in select locations with great transit access. The concept of the fund was originally developed by GCC but has since become its own independent entity. Two organizations representing the GCC, Reconnecting America and the Non-Profit Housing Association of Northern California, sit on the Fund's Advisory Committee.

TransForm: TransForm works to create world-class public transportation and walkable communities in the Bay Area and beyond. We build diverse coalitions, influence policy, and develop innovative programs to improve the lives of all people and protect the environment.

TSFF: The San Francisco Foundation: The San Francisco Foundation mobilizes resources and acts as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy.

ULI (Urban Land Institute): An organization that provides multi-disciplinary real estate forums and events to facilitate an open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better places.

Urban Habitat: Urban Habitat builds power in low-income communities and communities of color by combining education, advocacy, research and coalition-building to advance environmental, economic, and social justice in the Bay Area.

STRATEGIC PLAN PARTICIPANTS

Core Partners
Alia Anderson, Program & Policy Associate, Reconnecting America
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Dianne Spaulding, Executive Director, Non-Profit Housing Association of Northern California

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Task Forces
Vision/Mission: Allison Brooks, Heather Hood, Sandra Padilla
Stakeholder Input: Eyes, Ears, Mouths: Alia Anderson, Sandra Padilla, Evvy Stivers
Theory of Change/Strategic Framework: Heather Hood, Jeremy Madsen
Get Smart on Governance: Amanda Brown-Stevens, Jeff Hobson
Getting Even Smarter on Governance: Alia Anderson, Amanda Brown-Stevens, Gina Dalma, Jeff Hobson,
Connie Galambos-Malloy, Evelyn Stivers
Organizational Culture and Communications: Heather Hood, Dianne Spaulding
Local Policy and Planning: Amanda Brown-Stevens, Vu-Bang Nguyen, Sandra Padilla

Convening and Mobilizing: Alia Anderson, Heather Hood, Sandra Padilla
Finance Tools: Allison Brooks, Heather Hood, Dianne Spaulding
Regional Policy and Planning: Connie Galambos-Malloy, Jeff Hobson, Jeremy Madsen, Evvy Stivers, Abby Thorne-Lyman

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Jack Chin, Senior Analyst, Blueprint Research and Design
Ellen Clear, Vice President for Grantmaking, Silicon Valley Community Foundation
Stuart Cohen, Executive Director, TransForm
Gina Dalma, Program Officer, Silicon Valley Community Foundation
Ted Droettboom, Regional Planning Program Director, Joint Policy Committee (ABAG, BAAQMD, BCDC, MTC)
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Amie Fishman, Executive Director, East Bay Housing Organizations
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Jeff Hobson, Deputy Director, TransForm
Heather Hood, Initiative Officer, The San Francisco Foundation and Silicon Valley Community Foundation
Doug Johnson, Senior Planner, Metropolitan Transportation Commission
Ken Kirkey, Planning Director, Association of Bay Area Governments
Jeff Levin, Manager, Housing Policy and Programs, City of Oakland
Sam Liccardo, City Councilman, City of San Jose
Annie Loya, Regional Planning Program Director, Youth United for Community Action
Jeremy Madsen, Executive Director, Greenbelt Alliance
Andrew Michael, Vice President for Sustainable Development, Bay Area Council
Arlene Rodriguez, former Program Director for Leadership, Sustainability and the Environment, The San Francisco Foundation
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Carlos Romero, City Councilman, City of East Palo Alto
Doug Shoemaker, Director, San Francisco Mayors Office of Housing
Dianne Spaulding, Executive Director, Nonprofit Housing Association of Northern California
Jasmine Thomas, former Program Officer, Surdna Foundation
Marian Urquilla, Director, Program Strategies, Living Cities
Jim Wunderman, President and CEO, Bay Area Council
Scott Zengel, Vice President, Bay Area Family of Funds

Survey Respondents
In addition to 29 interviews there was an electronic survey targeted to the line staff of the GCC and one sent to local and affiliate partners. The line staff survey was sent to 23 people and there was an 87% response rate. The local and affiliate partner survey went to 19 organizations. A total of 8 partners responded, a rate of 42%.

NOTES ON STRATEGIES

Note that apply to all activities:

1. One objective of GCC is to build the capacity of existing nonprofits and partner organizations rather than to create a new institution. Thus, our various activities would not necessarily be branded as GCC.

Notes on Regional Policy and Planning:

1. The advocacy groups that have participated in drafting this strategic plan are already involved in numerous regional, state, and national policy campaigns. None of the activities described in this strategic plan are intended to replace that work. Rather, they are meant to bring new partners to those efforts, to improve communications between existing efforts, and to identify issues that might otherwise fall through the cracks.
2. This work, particularly the first and second regional policy and planning strategies, are the parts of GCC's work that are most intended to be an "unbounded network", an opportunity to grow the field of people and organizations interested in, educated about and capable of participating in and influencing these regional decisions.
3. As with GCC's other program activities in this new governance structure, this work will be done with significant guidance and involvement from a program committee, in this case the Regional Program Committee. This committee will have a changing membership and consist of key groups.
4. Recognizing that one objective of GCC is to build the field and not to create a new institution, we expect that these activities will *catalyze* regional campaigns. These campaigns will then be allowed to brand themselves and operate under their own identity. This is a continuation of GCC's past practice, as our local campaigns have generally been carried out under the banner of the individual partners involved in the campaign rather than under a common GCC identity. For future efforts, branding would be determined on a case-by-case basis. As part of the implementation of the strategic plan, current GCC partners will plan a future discussion to explore different branding policies and/or models.
5. Except where explicitly noted otherwise, this work will be lead and coordinated by GCC staff, with input/guidance from a Regional Program Committee.
6. In addition to definite funding for GCC staff, there may be some funding to some members of the Regional Program Committee to work with GCC staff to steer these meetings and do the periodic opportunity mapping.
7. One of the first tasks of this Regional Program Committee, in the transition period, will be to develop the principles.
8. Another transition task will be to set criteria to define an appropriate invitation list without being too narrow.
9. The overall intent that this work should supplement and support existing efforts, not duplicate or replace.
10. For the most part, we will try to catalyze these regional campaigns (potentially being branded and operated independently).
11. Note that we expect to have some funding to incubate and evolve these campaigns, on a case-by-case basis.

Notes on Convening and Mobilizing:

1. These activities would be in support of our other activities in response to a need or opportunity. Funds would only be invested if there is a need or opportunity.
2. There is some overlap with other strategies. For example, in the two convening and mobilizing strategies there could be overlap with local TOD work… the research for example could be captured in local TOD technical assistance. So it isn't called out here and yet, the TOD TA is a form of action-research.
3. We will most likely need one person or a committee that coordinates the efforts to create efficiencies, sharpen agendas, avoid redundancies in speakers, conflicting dates, etc.
4. Recognizing that one objective of GCC is to build the capacity of the existing nonprofits and not to create a new institution, these activities would not necessarily be branded as GCC. The branding would be determined on a case-by-case basis, and as part of the strategic plan implementation plan, current GCC partners will plan a future discussion to explore different branding policies and/or models.
5. The "right" groups to lead these activities would be determined on a case-by-case basis but might include organizations that are part of the governance of GCC and/or organizations that are part of the broader GCC network. This area of work is meant to be relatively "permeable" in that it will be most successful if it is undertaken with input and involvement from many organizations.

Notes on Finance Tools:

1. For all of these activities, we would need to be careful that we are not duplicating parallel efforts.
2. As we learned with the TOD Fund, the process to catalyze activities entails ramping up at a reasonable pace, including feasibility studies, cultivating trust with potential partners and choreographing momentum -all sub-activities that take time.
3. There are a number of activities that are not included such as pursuing a new mechanism to replace TIFs and working closely with housing authorities.