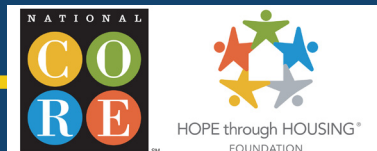




# The San Gabriel Valley HOUSING SUMMIT

Presented by



**November 16, 2022**  
**7:30 am - 12:00 pm**

**Pacific Palms Resort**  
**City of Industry**



LUIS PORTILLO  
**PRESIDENT & CEO**  
SAN GABRIEL VALLEY ECONOMIC  
PARTNERSHIP

Welcome Summit attendees,

California and the San Gabriel Valley's housing costs have been rising rapidly, particularly over the past decade. In 2012, the medium price for a home in the San Gabriel Valley was \$425,000. By 2021, the medium price had increased to \$925,000. These high housing costs make it difficult for many Californians to find housing that is affordable and that meets their needs, forcing them to make serious tradeoffs in order to live in California.

Housing, hand in hand with business retention, is the central issue facing California's economy. As a region built on manufacturing, transportation, water, education, and healthcare, finding ways for the workers crucial to our success to live locally and securely is paramount. To address these rising costs, we need to build more housing to keep up with demand and increases in population.

The San Gabriel Valley Housing Summit brings together forward-thinking developers as well as the elected officials to highlight proven approaches to build housing that meets our local needs. Our hope is to share best practices that cities can implement locally to increase housing but in a manner that meets their unique needs.

Californians have said time and time again that housing is one of their top priorities. Our elected officials in Sacramento have responded by adopting policies to spur more housing. However, those efforts are dependent upon the support of our local governments. New housing is best achieved when it's done hand in hand with local officials who understand the needs and challenges of their communities.

We have an opportunity in the San Gabriel Valley to show that locals can take the lead in tackling this issue. The outlook is positive, but the challenges are many. Thank you for your participation in today's event and helping provide a brighter future for the San Gabriel Valley and California as a whole.

Sincerely,

Luis Portillo

# Schedule

**7:30-8:00 am Breakfast & Check-In**

**8:00 am Program Begins**

**12:00 pm Program Concludes**

8:00 am	<b>Opening Remarks</b> <i>Steve PonTell, National CORE</i>
8:10 am	<b>Report on the Housing Market in the San Gabriel Valley</b> <i>Dr. Robert Kleinhenz, Kleinhenz Economics</i>
8:30 am	<b>Awards Presentations</b> <i>Senator Anthony Portantino (video)</i> <i>Senator Susan Rubio</i>
8:40 am	<b>Housing Challenges in California</b> <i>Liam Dillon, LA Times Writer on Housing</i>
9:00 am	<b>Keynote Address</b> <i>Lourdes M. Castro Ramírez, Secretary of the California Business, Consumer Services and Housing Agency</i>
9:45 am	<b>15 Minute Break</b>
10:00 am	<b>Case Study 1: Arroyo Walk Project, San Gabriel</b> <i>Joseph Perri, Director of Land Acquisition, The Olson Company</i>
10:10 am	<b>Case Study 2: Starlite Project, South El Monte</b> <i>Haggai Mazler, Vice President of Land and Entitlements at KB Home</i>
10:25 am	<b>Panel Discussion on Market Rate Housing: Challenges and Solutions to Expediting Development</b> <i>Moderator - Rene Bobadilla, City Manager, City of Montebello</i> <i>Ken Lee, VP of Development, Pacific Plaza Premier Development Group</i> <i>Brian Saenger, CEO, The Ratkovich Company</i> <i>Amanda Daams, Environmental Law &amp; Natural Resources Practice Group, Best Best &amp; Krieger</i>
11:00 am	<b>Case Study 3: Prisma Artist Loft Project, Pomona</b> <i>Alexa Washburn, Senior Vice President at National CORE</i>
11:10 am	<b>Panel Discussion on Innovative Approaches to Affordable/Workforce Housing</b> <i>Moderator - Jed Leano, Chair of SGV Regional Housing Trust, Mayor of Claremont</i> <i>Patricia Whitaker, VP of Asset Management, National CORE</i> <i>Philip Burns, the Arroyo Group</i> <i>Kerwin Esperias, Lending Market Leader, Bank of America</i>
11:45 am	<b>Overview of the San Gabriel Valley Housing Trust</b> <i>Monrovia Mayor Becky Shevlin, President of the SGV Council of Governments</i>
11:50 am	<b>San Gabriel Valley Regional Housing Trust Projects</b> <i>Marisa Creter, Executive Director of the SGVCOG &amp; SGVHT</i>
12:00 pm	<b>Concluding Remarks &amp; Call to Action</b> <i>Steve PonTell, National CORE</i>

# SPEAKERS



**Lourdes Castro Ramírez - Keynote Address**  
*Secretary, California Business, Consumer Services & Housing Agency*

California Governor Newsom appointed Lourdes Castro Ramírez to serve as Secretary of the Business, Consumer Services and Housing Agency on March 2, 2020. She leads and oversees 11 entities responsible for expanding affordable housing, developing comprehensive solutions to end homelessness, guarding civil rights protections, regulating banking and financial services, and strengthening consumer protections with the licensing of nearly 4 million working professionals.



**Steve PonTell - Master of Ceremonies**  
*Chief Executive Officer and President, National CORE*

Steve PonTell is the President and Chief Executive Officer of National CORE. Under his leadership, National CORE has continued to earn wide acclaim for its proven and effective approaches to building and preserving affordable housing that positively impacts communities. Steve is a passionate advocate for National CORE's residents and the communities we serve. He is recognized as one of the leading voices and public speakers on housing affordability and community transformation.



**Philip Burns**  
*Principal, the Arroyo Group*

Philip Burns' specialties include encouraging and mediating community engagement and public participation with diverse populations, data analysis, geographic information systems and form-based codes. Phil's recent project management experience includes transit-oriented development plans for four Metro Rail stations in Inglewood, active transportation, first/last mile and VMT-reduction projects in Pasadena, Carson and the east San Gabriel Valley, and an open space vision plan for Arleta and Pacoima in the City of Los Angeles.



**Amanda E. Daams**  
*Best Best & Krieger LLP, Environmental Law & Natural Resources Practice Group*

Amanda Daams assists clients on all issues related to the California Environmental Quality Act (CEQA), National Environmental Policy Act (NEPA) and associated environmental laws. She takes a pragmatic approach to solving difficult land use issues and advising clients on CEQA, NEPA, the Planning and Zoning Law, Surface Mining and Reclamation Act, Subdivision Map Act and related laws.



**Rene Bobadilla**  
*City Manager, City of Montebello*

For over 25 years, Mr. Bobadilla has been at the forefront of initiatives that create and support significant growth. He has a record of transforming problematic and challenging city operations in order to regain the respect of the residents served.



**Kerwin Esperias**  
*Lending Market Leader, Bank of America*

Kerwin Esperias is the Neighborhood and Community Lending Market leader in Southern California. Kerwin has been active in the mortgage industry for 22 years, and has led various teams of Loan Officers, throughout the region.



**Liam Dillon**  
*Staff Writer, Los Angeles Times*

Liam Dillon covers the issues of housing affordability and neighborhood change across California for the Los Angeles Times. He joined the Times in 2016 and prior to this assignment, Dillon covered state politics and policy for The Times' Sacramento Bureau.



**Dr. Robert Kleinhenz**  
*Principal Economist and Founder, Kleinhenz Economics*

A leading voice on the economy at the national, state, and local level, Dr. Kleinhenz taps over 30 years of experience to present his outlook for the economy and its leading industries, and to offer his perspectives on leading policy issues.





**Jed Leano**  
*Mayor, City of Claremont*  
*Chair, San Gabriel Valley Regional Housing Trust Board*

Mayor Leano serves as chair of the San Gabriel Valley Regional Housing Trust Board, Vice Chair of Tri-City Mental Health Board, and Claremont's representative to the San Gabriel Valley Council of Governments (SGV COG) Homelessness Committee.



**Ken Lee**  
*Vice President of Development,*  
*Pacific Plaza Premier Development Group*

Ken Lee is Vice President of Development at one of the fastest growing infill development companies in the Greater Los Angeles Area. Ken oversees real estate development activities of the company, including land acquisition, entitlement processing, property management, construction oversight, and retail leasing.



**Tom Love**  
*Upper San Gabriel Valley Municipal Water District*

Tom Love has been involved in water resource engineering and management for over 35 years. He has held leadership positions with regional and local water districts and has privately consulted agencies throughout Southern California. Tom served 16 years as a Board Director of the San Gabriel Valley Municipal Water District and Director on the Main San Gabriel Basin Watermaster Board.



**Haggai Mazler**  
*Vice President of Land and Entitlements, KB Home*

At KB Home, and previous companies, Haggai Mazler has successfully entitled several infill communities, focusing on areas with underserved housing needs or areas in need of revitalization. Haggai also serves an Executive board member of the Building Industry Association's LA/V Chapter.



**Joseph Perri**  
*Director, Land Acquisition, The Olson Company*

Joseph leads the effort to acquire new development opportunities in the San Gabriel Valley for The

Olson Company, a private residential development firm based in SoCal and focused on providing attainably priced housing solutions. He has over 15 years of experience in residential and commercial real estate throughout California, working on both development and in-place operating projects.



**Brian Saegner**  
*President & CEO, the Ratkovich Company*

Brian Saegner is a veteran real estate executive who played a leading role in The Ratkovich Company's acquisition and development of The Bloc in Los Angeles and West Harbor in San Pedro, among other major projects.



**Becky Shevlin**  
*Mayor, City of Monrovia*  
*President, San Gabriel Valley Council of Governments*

Becky Shevlin has served as Mayor and Mayor Pro Tem of Monrovia many times since 2009, most recently directly elected as Mayor in 2022. Among other duties, she serves as the delegate to the San Gabriel Valley Council of Governments (with direct appointment to the Community, Economic & Human Development Committee).



**Alexa Washburn**  
*Senior Vice President of Planning and Acquisitions, National CORE*

As an affordable housing developer and public agency program manager, Alexa Washburn has managed, prepared and implemented a variety of community development projects over her 20 year career. Her projects have been recognized with 12 awards from the American Planning Association and Southern California Association of Governments.



**Pat Whitaker**  
*Vice President of Asset Management*

Patricia Whitaker joined the leadership team at National CORE in 2019, bringing more than 30 years of experience in the affordable housing industry as a leader and advocate for low- to moderate-income families.



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# LEGISLATIVE UPDATE

*Major Housing Legislation Adopted by California in Recent Years*

## **SB 35 (Weiner, Ch. 366, Stats of 2017)**

Creates a streamlined, ministerial approval process for infill developments in localities that have failed to meet their regional housing needs assessment (RHNA) numbers.

## **SB 330 (Skinner, Ch. 654, Stats. of 2019)**

Prohibits, until 2025, local jurisdictions from enacting new laws that would have the effect of reducing the legal limit on new housing within their borders, or delay new housing via administrative or other regulatory barriers.

## **AB 1851 (Wicks, Ch. 196, Stats of 2020)**

Allows faith-based organizations like churches and other places of worship to reduce or eliminate parking requirements when they seek to build affordable housing on land they own or lease. It would also allow faith-based organizations to build housing on their parking lots and would prohibit cities from requiring the replacement of those parking spaces.

## **SB 9 (Atkins, Ch. 162, Stats of 2021)**

Allows two homes on every property zoned for single-family homes in California. It allows homeowners in most areas around the state to divide their property into two lots and allow two homes to be built on each of the lots, with the effect of legalizing fourplexes in areas that previously only allowed one home.

**SB 10 (Weiner, Ch. 163, Stats of 2021)** Authorizes a city or county to pass an ordinance that is not subject to the California Environmental Quality Act (CEQA) to upzone any parcel for up to ten units of residential density if the parcel is located in a transit-rich area or an urban infill site.

**AB 2097 (Friedman, Ch. 459, Stats of 2022)** Prohibits public agencies from imposing minimum parking requirements on specified residential, commercial and other developments located within one-half mile of public transit.

**AB 2011 (Wicks, Ch. 647, Stats of 2022)** Creates a ministerial, streamlined approval process for 100% affordable housing projects in commercial zones and for mixed-income housing projects along commercial corridors, as specified. The bill would also impose specified labor standards on those projects, including requirements that contractors pay prevailing wages, participate in apprenticeship programs, and make specified healthcare expenditures.

**SB 6 (Caballero, Ch. 659, Stats of 2022)** Establishes the Middle Class Housing Act of 2022, which enables housing development on parcels within a zone where office, retail, or parking are a principally permitted use.

**SB 679 (Kamlager, Ch. 659, Stats of 2022)** Establishes the Los Angeles County Affordable Housing Solutions Agency and authorizes it to utilize specified local financing tools to fund renter protections and the preservation and production of housing units affordable to households earning up to 80% of the area median income.

## Housing Prices

The California Association of Realtors forecasts that the statewide median will fall 9% from 2022 to 2023 and sales will fall by 7%.

# 89,600

new housing units needed in the San Gabriel Valley by 2029, according to the Southern California Association of Governments.



# The San Gabriel Valley HOUSING SUMMIT

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# Actions Cities Can Take to Support Housing Development in Their Communities

## “SET THE TABLE” FOR HOUSING

- **Help build local community support for housing development:** Community support for housing is critical to any housing project. Cities should work with residents to identify areas and sites that would be suitable for housing development and consider zoning tools (e.g., specific plans, overlays) and other local policies to incentivize housing in those areas. This would entice developers to pursue projects in the city where residents would embrace those projects.
- **Cities should explore opening commercial areas for housing:** New state laws passed in 2022 will require cities to provide ministerial approval of housing on commercial properties. Cities should take the lead on identifying properties that may best fit this type of use and creating zoning ordinances that promote innovative housing solutions, such as adaptive reuse projects that convert commercial office buildings into multifamily residential buildings.
- **Develop Specific Plans and program-level Environmental Impact Reports (EIR) for areawide and/or corridor level projects:** Cities should take the initiative to invest in land use tools and plans that attract housing density to the areas their communities want it most. The environmental review process for major developments can also be an impediment and significant source of risk to developers moving forward with projects. For area-wide and/or major corridor projects, cities should pursue the development of specific plans and program-level EIRs in strategic locations and corridors to encourage developers to pursue projects but to also provide clear direction of the type of project that city officials and local residents support.
- **Conduct an infrastructure analysis to determine capacity needs:** A major challenge for developments can be ensuring that the community has sufficient infrastructure capacity (e.g., street widening, streetscape improvements, sewer capacity, water supply) to meet the needs of the projects under development. By conducting an infrastructure analysis and developing capital improvement program (CIP) funding approaches to support additional infrastructure needs – especially in areas targeted for development – the city can better facilitate development.
- **Facilitate the construction of Accessory Dwelling Units (ADUs):** State law allows that every residential property can add an ADU and a Junior ADU. Cities can make the development of ADUs easier by adopting pre-approved plans that comply with the city’s building, residential, and green codes that property owners could use to construct their own ADUs. For example, the City of Los Angeles established a database where property owners could view a variety of plans that accommodate various site conditions. [tinyurl.com/ADUPlan](https://tinyurl.com/ADUPlan)
- The SGVCOG is working to establish a similar database for San Gabriel Valley cities.

55%

of households in the San Gabriel Valley own their homes.

## CREATE A CULTURE AT CITY HALL THAT SUPPORTS HOUSING

- **Internal assessment (audit) of entitlement and permitting process:** Cities should bring together key stakeholders (developers, community groups, etc.) to get feedback on their entitlement and permitting processes to identify areas that can be streamlined or modified to make projects move forward faster.
- **Establish a One-Stop Permit Center and Concierge Program:** Numerous cities – including many in the San Gabriel Valley – have a single location where developers can have plans reviewed, obtain permits, and ask questions from various departments in just one location. Cities that have not established such an office should consider establishing one. Additionally, cities should look at identifying a point of contact,



or “concierge,” for developers to work with to assist them in navigating the approval process through their various departments (e.g., planning, public works/engineering, building, fire).

The 30-year mortgage, which averaged 3% in 2021, will finish 2022 above 6%, with little relief expected until later in 2023 or early 2024.

## LEVERAGE ASSETS & RESOURCES

- **Participate in the San Gabriel Valley Regional Housing Trust (SGVRHT):** The SGVRHT provides gap funding and financing for affordable housing projects, funding for the construction and operation of homeless housing, and technical assistance to support the start-up and construction of homeless housing. The SGVRHT also offers a revolving loan fund that is available to provide funding for acquisition and predevelopment expenses for affordable housing development in the SGV. [www.sgvrht.org](http://www.sgvrht.org)
- **Consider surplus land for development:** Some publicly-owned parcels of land may be suitable candidates for affordable housing development. Cities should examine which unused publicly-owned parcels would be good candidates for housing, and evaluate the feasibility of making these parcels available for development. In cases, where the land may not be owned by the city but rather by school districts or other agencies, the city and landowner should work hand in hand to identify properties that may be used to meet local housing needs.
- **Take advantage of technical assistance resources at the SGVCOG:** The SGVCOG has established the Housing Incubator program, which provides technical assistance to cities to help support the development of housing. The SGVCOG has established a bench of consultants that could provide support to jurisdictions with financial analysis and technical support, real estate development and acquisition, land use and environmental analysis, public engagement and outreach, and grant writing. Interested cities should contact [sgv@sgvcog.org](mailto:sgv@sgvcog.org).

## CRAFT LOCAL POLICIES

- **Consider inclusionary housing policies with in-lieu of fees to facilitate more affordable housing development:** Five cities in the San Gabriel Valley (Alhambra, Claremont, La Verne, Pasadena, Pomona, and South Pasadena) have adopted inclusionary housing ordinances that requires new developments to include a proportion of affordable housing in at least portions of their communities. This can be a beneficial approach in some communities to increase the supply of affordable housing. Cities should evaluate whether this approach is best for them. For example, the SGVCOG is working with 4 member cities to complete an inclusionary housing feasibility study and, if feasible, an inclusionary housing ordinance that would require a proportion of affordable housing – or an in-lieu of fee – in certain circumstances. Cities should take special care to ensure these policies, including the methodology for calculating an in-lieu of fee, do not unintentionally deter market rate housing development in their communities. Cities are encouraged to invite the development community to the table for input and feedback when considering an inclusionary housing ordinance and in-lieu of fee.
- **Fee Deferrals:** Development impact fees are typically paid to cities before grading and building permits are pulled and construction can begin. Deferring the payment of these fees to the back end of the construction of housing projects, but prior to occupancy, can provide financial relief to developers shouldering millions of dollars of other costs, including major construction loans and carrying costs. Cities should consider policies that provide for the deferral of fees for major housing projects.

1,800+

permitted housing units through the first 8 months of 2022 in the San Gabriel Valley.



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\*Based on the 2022 BizFed/Pulse Poll





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