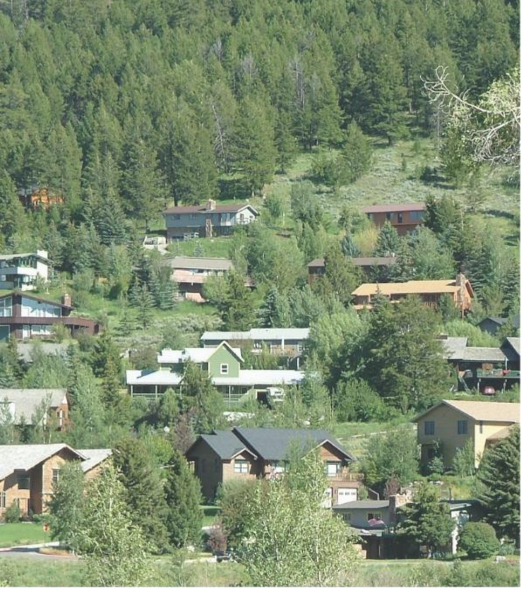
Teton County/Town of Jackson Housing Nexus Study and Needs Assessment RFQ Responses

Interview Questions

Clarion

1. How do you plan to incorporate and evaluate the data and recommendations of the Nexus Study and Needs Assessment components with little to no overlap between staffing for each component? Are you open to adding ROOT to the Nexus study portion of the project especially the recommendations task?
2. How do you plan to manage and get value out of all the proposed Team members? How were the hours between ROOT and OPS derived for the Needs Assessment component? Who will lead this component of the work?
3. Does your team have experience and had success completing such a large scope of surveying in a similar sized community? Surveying 3 different groups, employers, residential and household seems optimistic and challenging. Why do the residential and household surveys need to be separate? What is your goal for survey # respondents for each? If a statistically valid response is not received, how would you plan to move forward? How do you plan on ensuring a diverse spectrum (wealth, ethnicity, tenure, etc.) of the community is included in the survey responses?
4. What other housing mitigation tools have you proposed or seen utilized to address housing affordability other than those used locally?
5. How do you suggest this work (Nexus Study and Needs Assessment) could be communicated, quantified, and understood by the greater community?
6. Jackson has traditionally been a seasonal, two season economy (summer/winter) with substantial seasonal workers and housing needs, will you include analysis/forecasting that evaluates whether there may be an increase in year-round employment and how this could impact future housing needs?
7. How do you plan to identify and reach non brick and mortar business? Reliance on the proposed household surveys? In other communities how much of a factor do these have on the big picture (either tourism related or other business segment)? Have you worked on a study that included researching and including non-brick and mortar businesses? If so, what was the outcome, what tools were proposed and/or utilized?
8. Given your long history working in Teton County/Jackson and with our affordable housing regulations, how will you bring new ideas and not just "update" previous work.
9. Which team members would be responsible for meetings with a stakeholder committee – how many meetings, who facilitates who prepares materials?
10. How do you plan to approach Spanish speaking and Latinx outreach? What strategies have you utilized to ensure this outreach was successful in the past. Who will be responsible to complete this work? Consultants or interpreters?



Employee Generation By Land Use Study & Regional Housing Needs Assessment RFQ

Clarion Team Response to Questions

April 16, 2021

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Question 1

How do you plan to incorporate and evaluate the data and recommendations of the Nexus Study and Needs Assessment components with little to no overlap between staffing for each component? Are you open to adding ROOT to the Nexus study portion of the project especially the recommendations task?

The integration of the two studies will happen through RRC and OPS involvement in the data collection and analysis for each study, and Craig Richardson's (CR's) involvement in the Housing Needs Assessment.

In designing the work scope, we have attempted to integrate the data needed for the Housing Needs Assessment with the data needed for the Nexus Study, as well as the other components for each study through the survey work and also through secondary data collection. The survey data that is crucial to both studies will be collected and analyzed by RRC with input from Clarion, Root, and OPS. This will ensure that the primary source (survey) data, which is very important to supporting the legal defensibility of the Nexus Study and any mandatory mitigation requirement (as it provides core local data about housing demand/needs), is also utilized in the Housing Needs Assessment. It will also ensure that the housing preference information for the Housing Needs Assessment, that can only be obtained by survey, is collected concurrently.

With regard to secondary data, Dr. Nicholas's analysis of QCEW data will be shared with the Root team even though those hours are tabulated under the Nexus Study. And visa-versa for Root's analysis of the housing market. We have also, through part of OPS's involvement in each study, attempted to the greatest degree possible to ensure consistency in analysis without overlapping hours, and to ensure that all studies rely on the same source data (core local data). Somebody looking back at the studies in five years will only find one number for each datapoint, regardless of where in each study they are looking.

We have included CR (as well as Alex Norton from OPS) in the policy recommendations for the Housing Needs Assessment (Task 1.G), rather than including Root in the Nexus Study for a few reasons. We felt it better to coordinate the policy recommendations through the Housing Needs Assessment since it is the broader study in geography and scope. We recommend that the broader, regional Housing Needs Assessment recommendations inform the narrower Nexus Study recommendations rather than the other way around. The Housing Needs Assessment will also be completed a little before the Nexus Study (due to the additional survey time and calculations and analysis required for the Nexus Study). CR's involvement in the Housing Needs Assessment will not only ensure legal issues are addressed in the policy recommendations, but will also ensure there is coordination with respect to the policy recommendations themselves between the two studies. With this said, if it is your preference, we can alter this, and are certainly open to including Root as part of the budget for the policy recommendations for the Nexus Study (and take Clarion out of the budget for the policy recommendations for the Housing Assessment).

Question 2

How do you plan to manage and get value out of all the proposed Team members? How were the hours between ROOT and OPS derived for the Needs Assessment component? Who will lead this component of the work?

Clarion has worked many years on multiple projects with all team members – so we know the value each team member brings to the project and know they will produce the desired results. There is no overlap in hours.

- Clarion (CR) has worked with Dr. Nicholas on traditional exaction and affordable housing mitigation projects for nearly 40 years; the work involved the early and landmark litigation for the development of the legal parameters for exactions, to many "first-time" exaction programs in states, to many consulting projects both on affordable housing and other mitigation issues.
- We have relied on and worked with RRC for around 20 years (in three different states) for the survey work we have done on affordable housing mitigation, improving the design over time, in some instances under very challenging circumstances, on multiple different projects.
- We have worked with the principals at Root on a multitude of housing and related projects, for many years (before they started Root Policy Research – when they were principals at BBC). To give you an idea, the current and recent projects we have or are working on with Root include: the Adams County CO Balanced Housing Plan; the Fort Collins CO City Plan and Analysis of Impediments to Fair Housing Choice; the State of Colorado Communities Manual Reducing Housing Costs through Regulatory Reform; the Ridgway CO Comprehensive Plan; the State of Idaho Analysis of Impediments to Fair Housing Choice; the State of Texas Analysis of Impediments to Fair Housing Choice; the Bozeman MT Code Audit and revisions to the Affordable Housing Ordinance; the Evaluation of Albany NY inclusionary zoning issues; and the Columbia SC Housing Element.
- Finally, we have worked closely with Alex Norton of OPS on the Housing Requirements project for Jackson/Teton County in 2017-2018; based on that experience we know he is very comfortable and very skilled with the type of quantitative analysis required of this type of project and brings substantial local knowledge to the project. Additionally, CR worked with Mr. Norton on the legal implications and issues of the 2016 Teton County Rural Rezone, the 2015 update to the Jackson/Teton County administrative provisions, and the data collection for the 2013 Employee Generation Nexus Study – and based on those experiences we know he is a skilled planning practitioner on a broad base of issues, and someone who fits well on the team.

Regarding the Regional Housing Needs Assessment component and as stated in the response to RFQ, Root would lead this effort, with support from OPS. The hours were derived to ensure the integration of OPS local knowledge, integration of the Nexus Study analysis, input on recommendations, and specific areas of expertise relating to the economic profile and regulatory analysis.

Question 3

Does your team have experience and had success completing such a large scope of surveying in a similar sized community? Surveying 3 different groups, employers, residential and household seems optimistic and challenging. Why do the residential and household surveys need to be separate? What is your goal for survey # respondents for each? If a statistically valid response is not received, how would you plan to move forward? How do you plan on ensuring a diverse spectrum (wealth, ethnicity, tenure, etc.) of the community is included in the survey responses?

This question includes a number of specific questions, so we answer them separately below.

Does your team have experience and had success completing such a large scope of surveying in a similar sized community?

Yes. RRC has had experience and success in completing survey efforts with such a large scope (in several similar-sized communities):

- In the Aspen housing surveys (2008), RRC fielded employer, employee, and household surveys simultaneously in late March 2008. They fielded a fourth survey, a residential linkage survey of homeowners, a few months later, in summer 2008.
- In the San Miguel County & Ouray County housing needs assessment surveys (2011), RRC simultaneously fielded household, commuter, and employer surveys.

Surveying 3 different groups, employers, residential and household seems optimistic and challenging.

It is our general experience that most often a community conducts a housing needs assessment, commercial nexus study, and residential nexus study, as two or three separate studies, at different points in time – each of which requires surveys. The ambitious survey effort proposed here is driven by the fact that the RFQ requests that the Housing Needs Assessment and Nexus Study be completed simultaneously and coordinated.

Why do the residential and household surveys need to be separate?

We appreciate the sentiment behind this question, and in general prefer a streamlined survey approach, wherever possible. We are potentially open to consolidating the household and homeowner surveys, if, based on further discussions with staff, we collectively feel that a consolidated survey questionnaire and associated distribution methodology(ies) are feasible and preferable. Our proposal to have separate household and homeowner surveys is based on the following considerations:

- Keeping survey length manageable: having two separate surveys helps keeps the survey length manageable for each respondent group.
- The questions uniquely necessary for the household survey (but not needed for the residential employment generation survey) would likely take a few minutes to complete.
- Tailoring surveys to different populations: the two surveys have different target populations, geographically and demographically:
    - The household survey targets local residents (both owners and renters but excludes second homeowners) across the three-county region.

  - The residential employment generation survey targets local resident homeowners plus second homeowners in Teton County, WY only.
- Ensuring sample selection feasibility and representativeness, and workable survey methodology(ies). We are proposing mail-back surveys (with an option to complete the surveys online). For the household survey, we are open to also including an open-link option (open to anyone in the community) following the random sample survey. Rationale for this mail-back approach is:
  - It is the only realistic way of reaching second homeowners (for the homeowner survey): Mail is likely the only way to effectively reach second homeowners (for purposes of the homeowner survey), given the lack of email-based contacts and likely insufficiency of publicity-based approaches.
  - It enhances the household survey sample representativeness: Mail is likely to be one of the best ways of reaching a broad cross-section of the community, since every household has equal likelihood of being contacted. Other methodologies may have shortcomings.[1]

What is your goal for survey # respondents for each?

We anticipate a 20-30% response rate for the three random sample surveys. This would translate into approximately:

- 600 - 900 responses for the residential employment generation survey;
- 800 – 1200 responses for the household survey; and
- 360 – 540 responses for the employer survey.

If we implement an optional "open link" version of the household survey (supported by local publicity), that could potentially generate a few hundred additional household survey responses.

By comparison, the response rate in the 2012 survey work we did in the Town/County was:

- Residential employment generation survey 33.1% (3000 surveys mailed out, n=978 responses);
- Business survey was 24.3% (1000 surveys mailed out, n=217 responses)

If a statistically valid response is not received, how would you plan to move forward?

First, we strive to minimize the likelihood of an insufficient response by doing the following:

- Keeping survey length manageable;
- Having attractive, well-designed surveys;
- Having a cover letter explaining the survey purpose and importance of response;

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[1] Distribution of surveys by employers to employees: likely misses retirees; likely misses some self-employed workers; likely misses remote workers; may under-represent employees whose employers don't regularly use emails or texts for internal communications; it is dependent on employer willingness to promote the survey to employees.

Publicity-based approaches more likely result in a self-selected sample (e.g. may care more about housing issues, may be more civically involved, etc.). However, this could potentially be a helpful adjunct to the random sample household survey.

- Helping coordinate a community publicity effort;
- Sending out a reminder postcard;
- Utilizing quality contact lists;
- Sending the survey to a large sample;
- Likely offering an incentive for completing the household survey (e.g. random drawing for gift cards);
- Conducting the employer survey at a time when it may get more attention (i.e. in August/September, after July business peak); and
- Engaging trusted community partners to help with outreach to Spanish speakers.

If despite best efforts a survey underperforms in terms of response, we are prepared to undertake additional steps such as:

- Making telephone contacts to households and businesses to encourage response;
- Conducting supplemental mail reminders and outreach; and
- Weighting the survey results as needed to ensure it is demographically and geographically representative (e.g., with regards to housing tenure, age, place of residence, and/or other characteristics).

How do you plan on ensuring a diverse spectrum (wealth, ethnicity, tenure, etc.) of the community is included in the survey responses?

By ensuring that the surveys go out to a random sample of respondents that covers the full spectrum of the community. We might over-sample selected groups – e.g., for purposes of the homeowner survey, we might include a 100% sample of the very largest homes, and a partial sample of smaller homes. Similarly for lower income residents who tend to be less likely to complete surveys, we might consider steps like door-hanging surveys at apartments or mobile home parks. We also conduct special outreach to Spanish-speaking populations, similar to the 2014 household needs assessment survey. By ensuring that the survey efforts are well-publicized, that the surveys are easy to complete, and that survey completion is incentivized (by emphasizing the value of each person's response, as well as having a prize drawing in the case of those who respond to the household survey).

Concluding Thoughts

We have placed an emphasis on the importance of the surveys because we believe the survey work is very important in the design of the Nexus Study in particular. This is so because it provides local source data (versus state or federal data) on housing needs and preferences, which is very important in ensuring the results of the study and any housing mitigation requirements imposed based on the study are legally defensible. The reason is that it provides localized source data about housing needs for different residents and employees of the community, which can then be translated into proportionate mitigation requirements. This local source data is critical as the courts continue to raise the bar for the degree of scrutiny they apply to these forms of exactions.

Question 4

What other housing mitigation tools have you proposed or seen utilized to address housing affordability other than those used locally?

A number of the tools used by Jackson/Teton County are not used in Teton Valley or Star Valley and should be considered in those communities. Not all of these will be appropriate in the region (or in each community's context) but this list provides some examples of strategies used by other communities in which we have worked:

Strategies Not Used in the Region

- Development code requirements that a percent of homes in a subdivision or development be limited to a maximum dwelling unit size (square feet).
- Expansion of use of accessory dwelling units.
- Changing development code to allow for "tiny homes", e.g. https://www.aspentimes.com/news/aspen-skiing-co-adding-to-its-tiny-house-nation-in-basalt-campground/
- Programs to encourage conversion of homes from short-term rentals to long-term rentals (e.g. with tenant screening services, landlord education, cash incentives).
- Limitations on short-term rentals.
- A dedicated source of funding (e.g., general obligation bonds, dedicated property taxes, sales tax, etc.).
- Real estate transfer tax or excise taxes on homes of a specified value with revenue dedicated to affordable housing.
- Vacancy tax.
- Preservation of existing affordable housing through acquisition/rehab and landlord incentives to convert market-rate rentals to affordable rentals.
- Rental license programs.
- Business license fees for housing.

Strategies Used in Parts of the Region, but not Everywhere

- Simple bonus densities or other development incentives.
- Fast track development review, fee waivers/reductions, etc.
- Development code modifications to support a mix of housing types/sizes.
- Scaled development impact fees.
- Community benefit agreements.
- Use of local government owned land for affordable housing.
- Tax incentives for affordable development.
- Involvement by the private sector (businesses) in reducing the entry cost of housing.
- Employer assisted housing.
- Down payment assistance programs.
- Land banking (for the construction of affordable housing).

- Land trust partnerships (and other equity-sharing options for affordable ownership).
- Mandatory affordable housing mitigation requirements (e.g., forms of inclusionary zoning).

It is important to emphasize that we are very intentional about tailoring strategies to the local market and political context. We are focused on implementation of strategies that will produce meaningful outcomes. For example, we recently had a client that was convinced inclusionary zoning would be their solution. However, this community had relatively low development activity (slow growth) and our assessment was that inclusionary policies would fail to deliver the affordable units. Instead, we recommended they work to re-purpose some of their publicly owned land and work with several private landowners to "pre-approve" affordable development on appropriate parcels.

Question 5

How do you suggest this work (Nexus Study and Needs Assessment) could be communicated, quantified, and understood by the greater community?

In communicating the work to the community, it will be important to focus on the relatable numbers. People know how much they earn, they know how much housing cost last time they looked, and how much was available. (And if they haven't looked lately, they might not know how different things are.) People know whether traffic is worse, but don't necessarily know what to blame it on.

The purpose of these studies is to explain those experiences in statistically defensible terms that can support and justify action. The analysis required must be professional and detailed for practitioners, but the presentation to the public must be relevant and relatable. Presenting the project objectives/products as proof of experience (or refute of common perception) will make them more engaging and must start from the very beginning of the process. While the presentation must be simple, it must also be accurate. The community doesn't need precision, but it will dismiss analysis that doesn't ring true. A simple, accurate, graphic summary of each study will be important. First it is important to establish a common set of objectives that are being tracked throughout the process, for each individual study. These would clearly state what the purpose of each project is and how the two projects relate – and what each project achieves. All other more detailed messaging throughout the process can be built off these objectives. These "project tethers" will gain traction over the process and create a common understanding of what is being accomplished. These could be developed at the start of the project. Our proposal includes many examples of infographics Root has used in other Housing Needs Assessments.

Jackson/Teton County successfully used videos in its Engage 2017 initiative, led by Alex Norton.

http://jacksontetonplan.com/161/Housing-Requirements
http://jacksontetonplan.com/179/Town-Zoning

Clarion used a similar approach recently in James City County VA with scenario videos. (We helped write the script and staff produced the videos.)

https://www.youtube.com/watch?v=HrIMJAN1ASo&list=PLg1zt9Ay0TDOo5p-G3NepGSvjnBVP2TYS&index=17&t=166s

Root has also used webinar-style videos to summarize the results of recent studies—essentially serving as a video version of an executive summary. A recent example is a summary of findings from an affordable housing needs study for the City of Denver:

https://www.youtube.com/watch?v=IsvKopMN4Dw&list=PLR7u4aK8qqSGPd_sbZL1_Bf0g0qpQQAPa&index=3

We have also worked with communities to translate studies into relatable, web-based "story maps" like this example for the City of Tacoma WA:

https://storymaps.arcgis.com/stories/63476315c3f54736b846e477126959f1

Question 6

Jackson has traditionally been a seasonal, two season economy (summer/winter) with substantial seasonal workers and housing needs, will you include analysis/forecasting that evaluates whether there may be an increase in year-round employment and how this could impact future housing needs?

Analyzing the seasonal nature of Teton County employment is an essential component of the analysis we will complete. We have available monthly employment and wage data by industry for the past 12 years, which provides the means to identify and measure seasonal and year-round employment over that period. This sweep of time provides the data needed to assess the growth of both seasonal – winter and summer – and year-round employment, again by industry. Data are available to report earrings by seasonal and year-round employees and their households. We also have monthly data on employees that will help us look at trends in self-employed "gig-work." It is important to note that Jackson/Teton County's 2018 policy decision to not require mitigation for seasonal employee generation was not because seasonality was not analyzed in the 2013 Nexus Study. The seasonal nature of employment was a significant part of the 2013 analysis.

As part of the Regional Housing Needs Assessment, we do anticipate providing projections of housing demand and market gaps. We typically apply socioeconomic forecasts (provided by the state or other local planning entities) to the housing market. However, we understand the available socioeconomic forecasts may not account for shifts toward year-round employment or possible increases in the locally based remote workforce. If desired by the Town/County, we could include variations to those forecasts to analyze multiple demand scenarios driven by potential workforce changes.

As part of the employer survey, we can also ask employers whether they foresee future changes in the year-round vs. seasonal employment mix.

Question 7

How do you plan to identify and reach non-brick and mortar business? Reliance on the proposed household surveys? In other communities how much of a factor do these have on the big picture (either tourism related or other business segment)? Have you worked on a study that included researching and including non-brick and mortar businesses? If so, what was the outcome, what tools were proposed and/or utilized?

Our thinking right now is the employer survey and household survey will be a primary means of obtaining information on these businesses. We plan to use business license and mailing lists to identify employers for the local survey, which should reach non-brick and mortar business as well as others, because neither rely solely on a physical address. The survey results will be analyzed against data from business licenses, traffic counts, and the Travel and Tourism Board's cell phone data to make any necessary adjustments.

We have not attempted to quantify non-brick and mortar businesses as a separate category in Jackson/Teton County, or in any other communities. This was an emerging issue in 2012 and not an area of focus. It is important to note that the employee generation rates in the 2013 Nexus Study are derived from employer surveys (not secondary data) so they do not over ascribe employee generation to development. As a starting point, we applied the 2012 employee generation rates to development since 2002 and found that job growth was about 10% greater than we would have expected based on development. Our work will explain this shortfall.

In this study we will attempt to quantify the non-brick and mortar universe in Teton County, by looking to both further define the segment in partnership with the Town/County, and measure it using a combination of the employee and household surveys and secondary data sources.

One important secondary data source is the US Census's Annual Non-employer Statistics series. In 2018 Teton County WY had 5,647 non-employer establishments with combined revenue of $401 million and an average of $71,000 in revenue per establishment. Non-employer establishments were distributed across a wide range of NAICS sectors, led by real estate, rental and leasing (1,326 establishments), professional, scientific and technical services (1,052 establishments), and arts, entertainment and recreation services (501 establishments).[2]

Another important data source is US BEA data on proprietor jobs and income, insofar as there is a fair amount of overlap between proprietors and non-brick and mortar businesses. Again, this data is available by industry sector, and extensive long-term historical trending data is available.

The periodic US Economic Census (breakouts by form of organization), local business license lists (e.g., for identifying out of town organizations operating within Teton County), out-of-region taxable purchases (as potentially identified by Wyoming Department of Revenue), and private business lists may also be helpful resources.

Finally, it is also important to note that in addition to the non-brick and mortar issue, there is also the emerging issue of day-labor employee generation. These are workers living outside the valley, working for businesses located outside the valley, who do not show up in the secondary data (but they are

[2] By comparison, in Teton County WY in 2018, there was an annual average of 2,395 QCEW employers with roughly 21,000 employees and $1.0 billion in wages (rather than sales). Also, total GDP in Teton County was $2.5 billion.

actually working in Jackson/Teton County on a daily basis). The combination of the Housing Needs Assessment and Nexus Study are an excellent opportunity to explore this issue.

Question 8

Given your long history working in Teton County/Jackson and with our affordable housing regulations, how will you bring new ideas and not just "update" previous work.

We assume you mean Clarion and Dr. Nicholas, since Root, an important team member and the firm responsible for preparation of the Housing Needs Assessment, has never worked in Jackson/Teton County or the region.

With respect to Clarion, two of the firm's benchmarks are its commitment to innovation and role as best practice leaders.[3] One of those best practices areas is exactions and affordable housing mitigation. Without question, the area of mandatory affordable housing mitigation is, in our opinion, one of the most challenging areas to work (if not the most challenging), because of the need to address ever changing and to some degree uncertain legal issues, along with the need to design acceptable need/proportionate share methods for mitigation. That is one of the reasons we began tackling this work over 25 years ago, and why, if you look at our body of work over the past 25 years in Jackson/Teton County (as well as in other resort communities), you will see there has been a constant evolution, innovation, and new and better methodologies used with respect to the "proportionality" issue in this work. As has been the case over the past 25 years, we think our work will continue to evolve in this area.

The methodology used in the study used to support the first mandatory mitigation requirement done in the 1990s, is dramatically different from the nexus study done in 2013. The update in 2018 of the housing requirements, took a different and more comprehensive approach than the previous studies. The same is the case for the nexus studies we have prepared in other communities.

This is so because we constantly work to improve the approaches we use. This is done by staying current on the case law, statutes, literature, and best practices and also speaking and writing on the issue, and participating in conferences with scholars on the appropriate approaches to measuring need/proportionality. For example, Dr. Nicholas (along with legal scholar Julian Juersgensmyer) has presented the most recent methods used or proposed in Jackson/Teton and other resort communities to legal scholars and methodologists at national seminars and meetings, to get reactions and criticisms, and published on the issue. Mr. Richardson, Ms. King, and Dr. Nicholas were accepted to present at the 2020 national APA conference in Houston (which was cancelled due to Covid-19), a session on the law and the most recent methods for determining need and "proportionate share" in affordable housing mitigation regulations.

We began working on this issue in Jackson/Teton County when no other community in the state had adopted mandatory affordable housing mitigation requirements. It was questionable whether either the County or Town had authority to even enact such regulations; the *Nollan/Dolan* decisions were new, and proportionate share issues relevant to housing mitigation were quite honestly in their infancy. In consultation with the Town/County, we designed the first support study, and then working as special counsel for the Teton County Attorney, prepared the legal strategy and briefs that resulted

[3] There are a number of substantive areas where the firm has lead on best practices issues. Of particular note to Jackson/Teton County they include exactions and affordable housing mitigation, wildlife protection, rural character protection, conservation practices, sustainability, green building practices, and resiliency.

in the Wyoming Supreme Court embracing the fact that the County had the authority to adopt mandatory affordable housing mitigation requirements, and then later assisted with a facial challenge to the affordable housing regulations (which were upheld by the Wyoming Supreme Court).

While the legal environment in Wyoming state court on this issue is clearly better today on this issue than it was in the late 1990s, there is now a lot of uncertainty at the federal level, given the change in membership of the US Supreme Court. For this reason, we must stay constantly vigilant on the issue, and constantly work to improve the design of nexus studies.

In concluding, we note that in 2012 we didn't know what the post-Recession economy was going to look like and were not talking about non-brick and mortar or day labor impacts to employee generation. We introduced those issues to the community in 2018, but only expanded the Nexus Study to fill the policy desires of the community at the time – which focused on mitigation of year-round employee generation through commercial development. We are excited to explore the issues the Jackson/Teton County community has identified since 2018 because you are at the leading edge of this work too. Non-brick and mortar generation, day labor generation, business license mitigation, distribution of employee generation requirements to residential and lodging development, and the other ideas circulating the community will create a truly innovative analysis of housing requirement options.

Question 9

Which team members would be responsible for meetings with a stakeholder committee – how many meetings, who facilitates who prepares materials?

It depends on which study you speak of. Alex Norton of OPS, because he is based in Jackson would be involved in all the meetings. The initial stakeholder kick-off meeting (under Task 2.A) will be a combined effort. Root, Clarion, and OPS will facilitate a discussion of project goals and expectations. All team members will work to prepare the agenda and materials for staff review prior to the meeting. This is the initial meeting where we will ensure all issues and concerns are identified.

After the kick-off meeting, Mollie Fitzpatrick of Root Policy would be responsible for leading and facilitating the meetings related to the Housing Needs Assessment, in collaboration with Alex Norton. Root would prepare the materials, which would be reviewed by Mr. Norton, Mr. Richardson, and staff prior to the meetings. Root will provide email progress reports to the stakeholder group throughout the process to keep the stakeholders engaged and enlist them in engaging the community. The second stakeholder meeting proposed for the Housing Needs Assessment (Task 1.G) is actually a series of meetings in each community with an expanded list of stakeholders, especially in Idaho and Star Valley.

After the kick-off meeting, Craig Richardson, in collaboration with Alex Norton and David Becher, would be responsible for leading and facilitating the meetings related to the Nexus Study; they would be assisted by Leigh Anne King and Geoff Green of Clarion. In addition, Dr. Nicholas would be available virtually, if needed. Clarion would prepare the materials, which would be reviewed by Mr. Norton, Dr. Nicholas, Ms. Fitzpatrick, and staff, prior to the meetings. The second meeting would be on the survey results, lead by Mr. Becher, with assistance from Mr. Norton. The next stakeholder meeting would be on the draft Nexus Study, at which the draft study will be reviewed, the data discussed, along with the initial recommendations (prior to finalization of the study).

Question 10

How do you plan to approach Spanish speaking and Latinx outreach?

Diverse engagement is a core part of all our housing work and is informed by our experience in language access, fair housing, and equity planning. Our team has had repeated success in organizing and facilitating inclusive, community-driven processes. We work hand-in-hand with staff, citizens, grass-roots organizations, and elected and appointed officials in developing policies and plans in a manner that achieves strong ownership in the process and outcomes. We hope to work with VoicesJH and other local groups to apply our experience in a way that is relevant to the local population. Our team includes a native Spanish speaker with experience facilitating focus groups and conducting targeted outreach in ESL communities.

- We prioritize tailored outreach and promotion—in other communities this has included pop-up engagement at day labor sites, advertising surveys and engagement opportunities on Spanish-speaking radio, hosting booths at local cultural events, and connecting with trusted organizations serving limited English populations.
- We also offer interpretation at all broadly targeted community events.

For the Housing Needs Assessment, our primary form of resident engagement will be the survey; however, we also have scoped one focus group in each county that focuses on housing challenges experienced by the Latinx community. Depending on the preference of the project manager, these groups could be with stakeholders serving this population or directly with residents of Hispanic descent and could be facilitated in either Spanish or English. If the Town/County desire direct engagement with Hispanic/Latinx residents, we will work with local service providers, organizations, and employers to help us recruit focus group participants.

With regards to survey design:

- All surveys would have online Spanish versions.
- All surveys would have instructions in Spanish on how to access Spanish language versions.

With regards to special outreach to Spanish speaking populations we would also utilize some of the community partners which proved helpful to the 2014 household survey effort, including social service agencies, school districts, employers, and churches.