Posted at the Santa Fe County
Administrative Building
Date: 9/6/16 Time: 3:50pm
By: Andrea Kirkpatrick

Board of County Commissioners of Santa Fe County

County Commission Chambers
County Administrative Building
102 Grant Avenue
Santa Fe NM 87501

SPECIAL MEETING

September 13, 2016, at 11:00 a.m.

Please turn off cellular phones during the meeting.

Agenda

I. Call to Order.

II. Roll Call.

III. Approval of Agenda. (Action Item)

IV. Presentation, Discussion and Approval of the Program for the Santa Fe County Administration Complex Project. (Public Works Department/Mark Hogan) (Action Item)

V. Presentation, Discussion and Non-Final Direction on Possible Amendments to the Affordable Housing Requirements of Chapter 13 of the Santa Fe County Sustainable Land Development Code (SLDC). (Growth Management Department/Robert Griego). (Action Item)

VI. Adjournment (Action Item)

Santa Fe County makes every practical effort to assure that auxiliary aids or services are available for meetings and programs. Individuals who would like to request auxiliary aids or services should contact Santa Fe County Manager's Office at (505) 986-6200 in advance to discuss specific needs (e.g., interpreters for the hearing impaired or readers for the sight impaired).

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COUNTY ADMINISTRATIVE OFFICES

COUNTY ADMINISTRATIVE OFFICE COMPLEX

- The Program Document

(This presentation focuses on key aspects and related decisions that will help shape the outcome of this project. The intention is to highlight the building blocks of the program, how they relate to the overall planning of the project, the costs and functional of the completed facilities)

Primary Decision/Approval Points:

1. Space allocations for each Department
2. Does SFC Renovate or Restore Old Admin?
3. Approval of the planned Location of Functions
4. What Parking will be provided?

GRANT ST. OFFICES

OLD ADMIN OFFICES.

COUNTY ADMINISTRATIVE OFFICE COMPLEX

Review Goals and Objectives Established for the project by the BCC in May 2012

This list is culled from the May 2012 Next Steps presentation made to the BCC to initiate the project.

1. Vacate Leased Space at Market Rent.
2. Consolidate County Administrative Functions.
3. Completes the Three Campus Plan for County Facilities
4. Reduce County Dependency on City Parking
5. Create Centrally Located Facilities with Easy Public Access
6. Long Term Leveraging of County Assets
7. Create Short Term Revenue Stream to the County
8. Maintains Traditional Use of Original County Building and Chambers
9. Maintains Tradition of Civic Offices in Downtown Santa Fe.
10. Improve efficiency of County Operations.

Decision/Approval Point **1**

Space Allocation for Departments

- The space allocation presented here reflect the results of interviews with each department and research associated with establishing overall space needs for each user group located in the Administrative Complex.

Space requirements were initially studied in the 2013 Feasibility Study (Nov. 2013). Beginning in early 2016 the Spears Horn design team initiated interviews with each department director to cull the requirements for each group and to confirm the needs of each department were being accurately planned.

The results presented here have been confirmed with each Department Director prior to completing this tally. These will be the space allocation that the design team will use to establish the size and organization of the new building and the fit of designated Departments in the Old Admin building.

The degree of variance from the 2013 Program is a 11.5% area increase as represented in the numbers to the right.

A flex space of 3200 sf has been added to the program to provide for Community use or other designated functions.

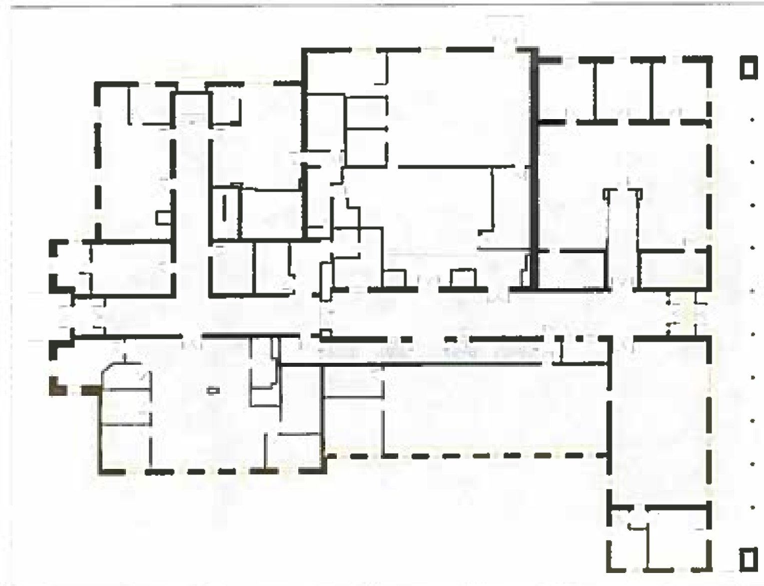
Departments Included	
Administrative Services	2,257 sf
Assessor	7,582 sf
County Attorney	2,752 sf
County Commissioners	2,262 sf
County Manager	2,717 sf
Community Services	10,271 sf
Clerk	7,318 sf
Film Office	624 sf
Finance	4,091 sf
Growth Management	9,239 sf
Human Resources	3,220 sf
IT	3,892 sf
Probate Judge	570 sf
Procurement	1,705 sf
Treasurer	3,838 sf
Building Common Old Admin	13,545 sf
Building Common Grant Ave Complex	10,479 sf
Flex Space	3,200 sf
TOTAL	**111,953 sf**

Decision/Approval Point 2

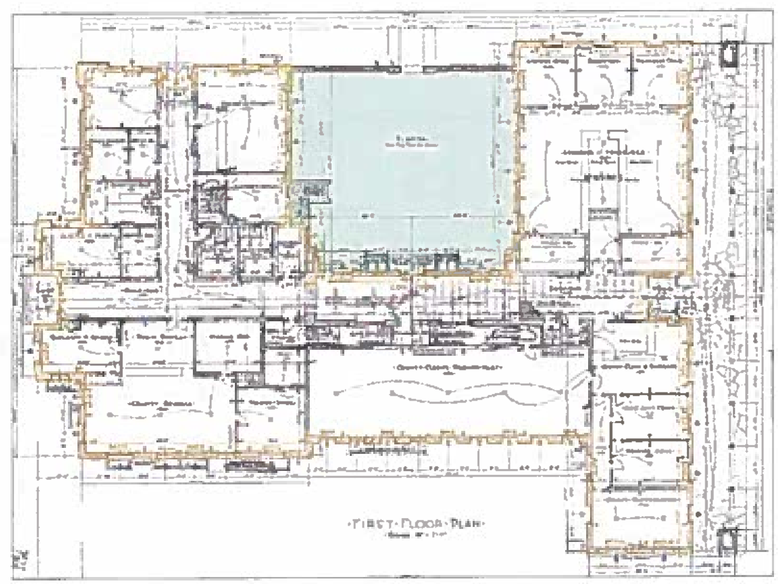
Does SFC Renovate or Restore Old Admin ?

- The Old Admin Building is a Historic Building designed by celebrated Santa Fe architect, John Gaw Meem. The structure is an outstanding example of Meem's contributions to establishing and maintaining an architectural style unique to Santa Fe.
- The Building contributes significantly to the Landmark Status of this district. In the 1970s two additions to the building were constructed in the Courtyard or Placita on the North side of the building. The additions significantly changed the quality of the original architecture and also limited the natural light and quality of interior space on both the first and second floor.
- The proposal to fully restore this structure and return the Placita to the Johnson Street side of the building has been advanced as an obvious opportunity to highlight the County's pride in our rich history through this opportunity to replace the displaced area from the Placita and replace it in the new building on Grant Street.

Current Plan of Ground Floor



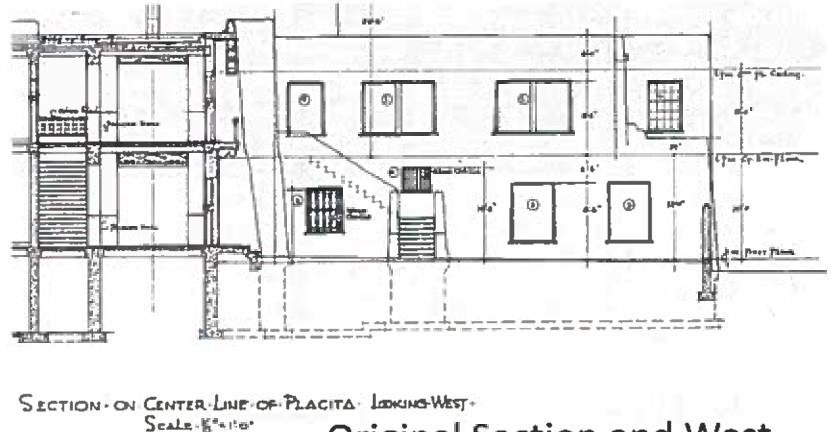
Original Plan of Ground Floor



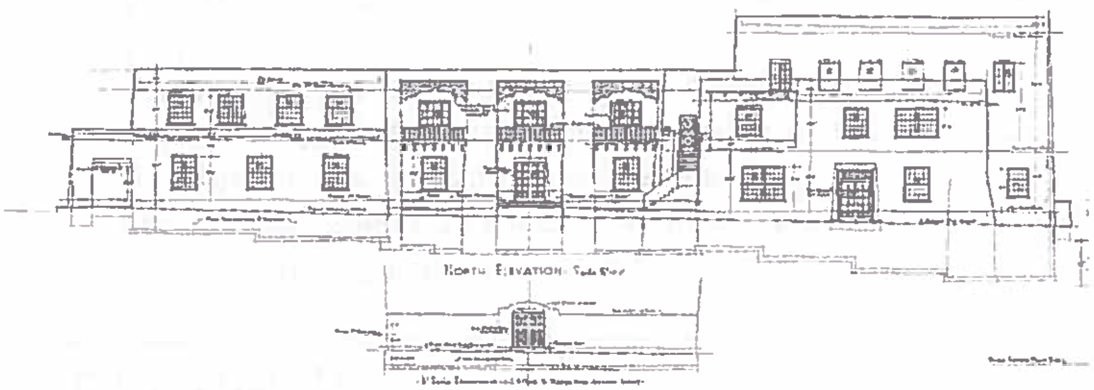
Does SFC Renovate or Restore Old Admin ?

Original Corbels Still Exist Inside at Land Use and Legal

Gate to Old Placita at Johnson St.



Original Section and West Placita Elevation



Original Plans of Elevation at Placita – Johnson Street

Current View of 1979 Addition as seen from Johnson Street

Decision/Approval Point **3**

Location of Functions For Renovation or Restoration Options

Renovation of Old Admin Building

- **Administrative Services**
- County Attorney
- County Commissioners
- County Manager
- Finance
- **Human Resources**
- **Procurement**

Restoration of Old Admin Building

- County Attorney
- County Commissioners
- County Manager
- Finance

(Denotes those Functions that would move to Grant Avenue Complex if the Restoration Option is selected)

Grant Avenue Complex with Renovation

- Community Services
- County Assessor
- County Clerk
- County Treasurer
- Film
- Growth Management
- Information Technology
- Probate Judge

Grant Avenue Complex with Restoration

- **Administrative Services**
- Community Services
- County Assessor
- County Clerk
- County Treasurer
- Film
- Growth Management
- **Human Resources**
- Information Technology
- Probate Judge
- **Procurement**

Decision/Approval Point **4**

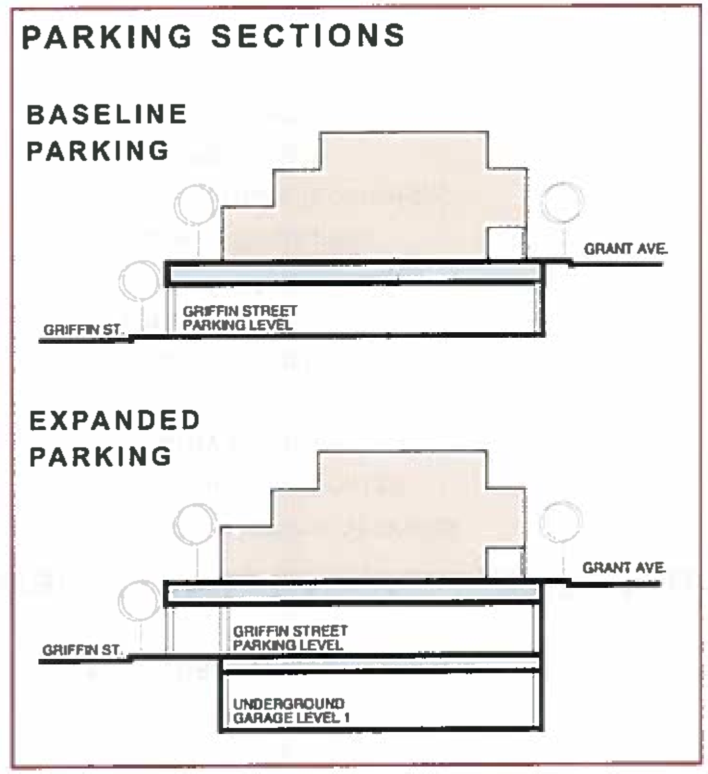
Parking Appropriation

- Parking Requirements for the Public and County Staff can be met with two levels of parking.
- The inclusion of Fleet Vehicles will require the addition of a below grade level to meet the added parking demand.

The 2013 Feasibility Study projected parking demand for the Public and for all the County Staff that will be working at the Downtown Administrative Campus. The cost of parking further below grade increases the cost of each space. In 2013 it was thought that Public Parking would be accessed off of Grant Avenue at the approximate level of Grant Avenue.

The requirement for Public Parking at the Grant Avenue Complex has been estimated at 30 spaces. A more specific assessment based on trips to each department is underway to establish a final number of Public Spaces.

The Cost projections for the added spaces to accommodate fleet vehicles are shown on the right.



County Staff + Public Parking Reqs.	**290 spaces**
Existing Parking at Old Admin Building	38 spaces
Parking at Grant Street Level (Public)	30 spaces
Parking at Griffin Street Level	222 spaces
Baseline Parking Cost (290 spaces)	$ 6,154,966
Required Fleet Parking	**60 spaces**
Cost increase for Fleet option	**$ 1,546,823**

Decision Cost Summary

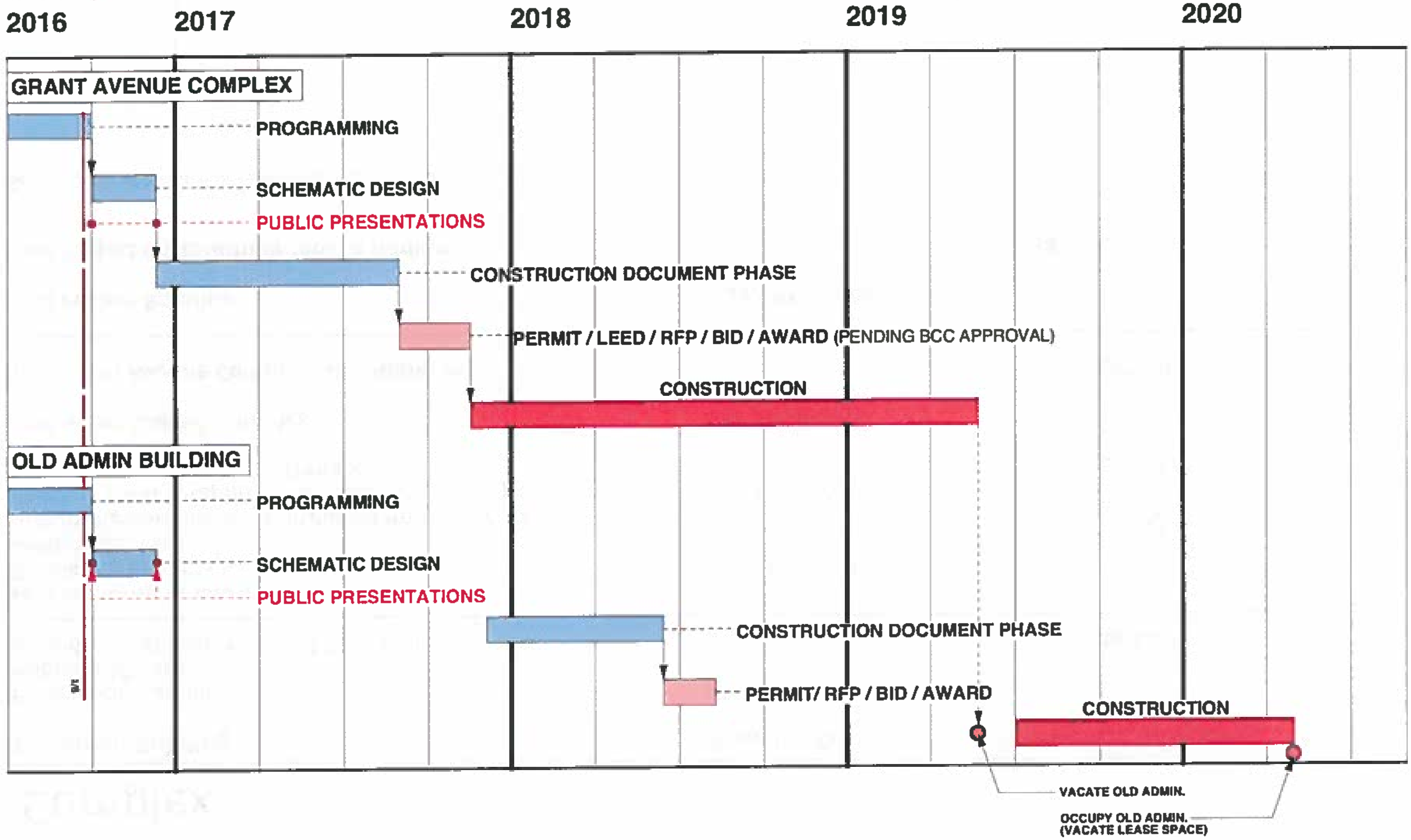
County Administrative Office Complex

Old Admin Building	Baseline Costs	Proposed Additions
•Renovation Baseline Costs	$5,140,000.00	
•Added A&E Fees		$ 257,733.80
•Added Cost of Restoration of Old Admin		$ 1,121,661.00
New Building at Grant Avenue		
•Baseline area/costs	$20,788,551.00	
•Added A&E Fees		$643,282.12
•Add for Restoration Area displaced from Old Admin		$2,627,771.00
•Baseline Parking (approx. 252 Spaces w/Public)	$ 6,154,966.00	
•Added Parking for Fleet (60 spaces)		$ 1,546,823.00
Total Grant Avenue Complex	**$26,943,517.00**	
Total Grant Avenue Complex with Additions		**$31,761,393.00**
Total Project Baseline	**$ 32,083,517.00**	
Total Project Costs with Proposed Additions		**$38,280,788.00**

($6,197,271) difference between Baseline and Baseline with all additions)

ESTIMATED PROJECT SCHEDULE
SEPTEMBER 1, 2016

COUNTY ADMINISTRATIVE OFFICES
SPEARS HORN ARCHITECTS / JH



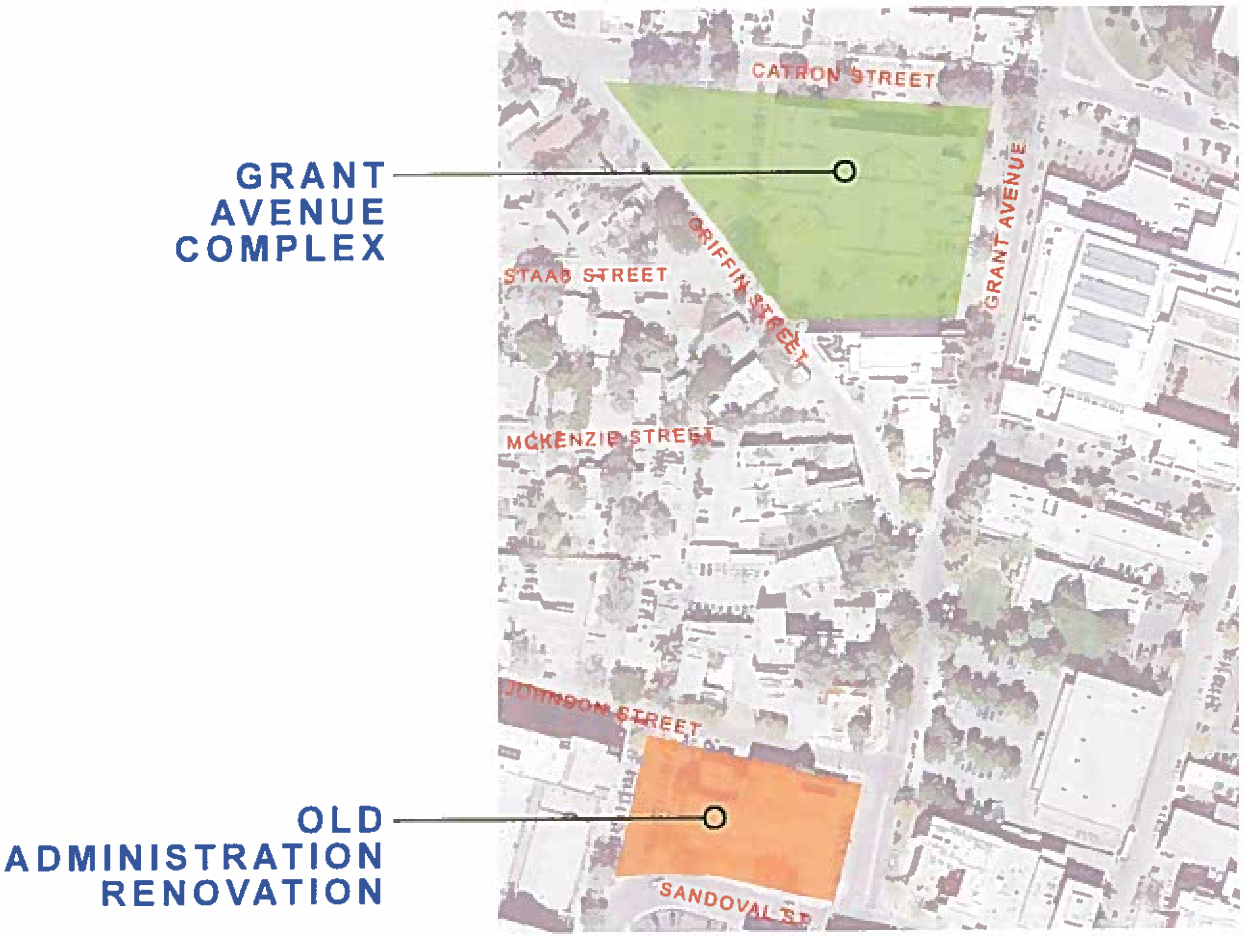
COUNTY ADMINISTRATIVE OFFICES PROJECT

PROGRAM AND SITE ANALYSIS REPORT

- Old Administration Renovation
- Grant Avenue Complex

EXECUTIVE SUMMARY

16 September 2016



SPEARS HORN
ARCHITECTS

COUNTY
ADMINISTRATION
OFFICES

SPEARS HORN ARCHITECTS dg

DESIGN TEAM / CONSULTANTS

CLIENT
Santa Fe County / Projects Division
www.santafecountynm.gov

DESIGN ARCHITECTS / PROGRAMMING
Spears Horn Architects
www.spearshorn.com

PRODUCTION ARCHITECTS / CIVIL
Hartman Majewski Design Group
www.designgroupnm.com

STRUCTURAL ENGINEERS
Heatly Engineering Inc.

MEP ENGINEERS
Bridgers & Paxton Consulting Engineers
www.bpce.com

LANDSCAPE ARCHITECTS
Design Office
www.do-designoffice.com

LEED CONSULTANT
Noresco
www.noresco.com

ESTIMATING
Halford Busby
www.halfordbusby.com

COMMISSIONING AGENT
Engineering Economics, INC.
www.eeiengineers.com.com

OUTLINE / INDEX

A

EXECUTIVE SUMMARY

COUNTY ADMINISTRATIVE OFFICES
PROJECT SUMMARY

The architectural team led by Spears Horn Architects has been hired by the Santa Fe County for professional design services for the County Administrative Complex. This includes the modernization and renovation of the Old Santa Fe County Administration Building, on the corner of Grant Avenue Sandoval Street, to improve the facility and allow continued and improved use of the facility through the 21st century. Additionally, the design team is tasked with the demolition of the Old Judicial Complex, located on the corner of Grant Avenue and Catron Street, and to design a new Santa Fe County administration facility at the same location. The new facility will increase agency efficiency and ease of access for the public. For clarity and consistency, the building projects are named separately as the Old Administration Renovation for the renovation of the existing historic County Administration building and the Grant Avenue Complex for the new building. The Architect has provided a historic report of the historic John Gaw Meem building (Old Administration Renovation).

The design priority is to fully program the use of the Old Administration Renovation to utilize all existing capacity and then program the use of the new Grant Avenue Complex. Funds will be allocated to the Old Administration Renovation first, then remaining funds to the Grant Avenue Complex. This may entail phasing the work of Grant Avenue Complex and / or further fundraising to accomplish the project. The preliminary stage of this project (Programming Phase) involves identifying County Departments and stakeholders, data collection, and analysis of the site and urban context. By the end of the Programming Phase the design team will have compiled historical documents, code information, stakeholder interviews and graphic studies exploring adjacencies of departments and site configurations based on the context. This information is compiled in this programming / analysis document and will be delivered to the County.

The County Administrative Offices are to uphold the values and vision of Santa Fe County, while augmenting them with supporting contemporary and progressive ideas in office design and supporting facilities. These two buildings are on two separate, yet nearby, downtown Santa Fe sites. The buildings and their sites need to be well connected and complimentary to each other, and immersed in the vitality of the unique urban condition of downtown Santa Fe. Being sensitive to the range of building types and sizes adjacent to the site is critical to a responsible realization of this project. The diversity of Santa Fe County will be considered in the design and implementation of the buildings and their sites. The budget for the County Administrative Offices project is important to consider. The design must implement strategies that are cost effective, more conventional, and utilize regional and local supplies and labor, unless out-of-region supplies or labor bring value and efficiency to the effort. Included in this report are probable cost estimates, which include additive alternates. The intent is that the estimating can assist in the appropriate scope and possible phasing strategies to move forward.

LEED - The County is dedicated to achieving LEED Certification for the Grant Avenue Complex. This will help the County and Design Team achieve many of the sustainability goals that have been set early on in the process. The project sustainability approach is currently focused on LEED 2009 standards and our team feels confident we can acheive LEED Silver Certification. Please see the LEED Checklist in the Appendix.

OLD ADMIN RENOVATION - SUMMARY

The Old Administration Building, historic John Gaw Meem building, is a very important building in the historic fabric of Downtown Santa Fe. Built in 1939, this building was used as the Santa Fe County Courthouse. Today it is the current County Administration Building and is home to many departments, including the County Manager's office and Board of County Commissioners. The original courtroom was converted to the County Commissioners Chamber for County Commission meetings and hearings.

The scope for the Old Administration Restoration includes a full interior renovation and systems upgrades. The programming process will inform the interior renovation as we establish adjacencies and specific needs of each Department. Upgrades are planned to include new mechanical systems, lighting, technology / data and two new life safety egress stairs. If the budget allows, possible exterior work may take place. This work could include a new roof, window repairs and/ or stucco and landscape upgrades outside the building. Alternates to project scope are discussed on page 15.

Accessibility is very important to Santa Fe County and the Design Team. Making a historic building accessible can be challenging. Our goal is to improve how the site and building are accessed and make it a safe, comfortable place for County employees and the public. These improvements could include ramps, elevator upgrades and making restrooms more accessible.

The corridors of the Old Administration Building could be used as display space for local artists or County history including the history of the Old Administration Building itself. If Alternate 1, Placita Addition Removal / Restoration, is completed the restoration process could be displayed. The restored placita could include communal "museum" space for the public to enjoy outdoor activities or outdoor art displays.

See page 15 for a description of alternates:
- Alternate 1: Placita Addition Removal / Restoration
- Alternate 2: Additional Landscaping and Irrigation

GRANT AVENUE COMPLEX - SUMMARY

The Grant Avenue Complex, will be located on the site of the Old Judicial Courthouse. The building and associated exterior spaces of the Grant Avenue Complex are to address the urban condition of downtown Santa Fe. Creating Interior to Exterior connections is important to providing a quality working environment. These can be direct / physical connections, or visual connections from within the building to the exterior. Providing workspaces with these connections makes conditions more conducive to productive work. Providing ample room and support areas, while providing flexible spaces, is important due to the number of departments that are in one building.

The Grant Avenue Complex should complement the significant buildings and spirited urban condition of downtown Santa Fe. The building design should express regional materials and tones and be constructed of durable and lasting materials. The scale and height of the building needs to be carefully considered and studied to best integrate with and complement the adjacent buildings. This site is an important downtown Santa Fe site that is directly adjacent to the Santa Fe Community Convention Center, First Presbyterian Church and Daycare, El Corazon Condominiums, Carlos Gilbert Elementary School, and a number of single family residences and businesses along Griffin Street. The alignments and openings of these adjacent buildings will be considered and interwoven into the site spaces and efforts. The Grant Avenue Complex is also within walking distance of Santa Fe Plaza, Santa Fe City Hall, the Georgia O'Keeffe Museum and Facilities, and numerous other civic and government buildings and parks.

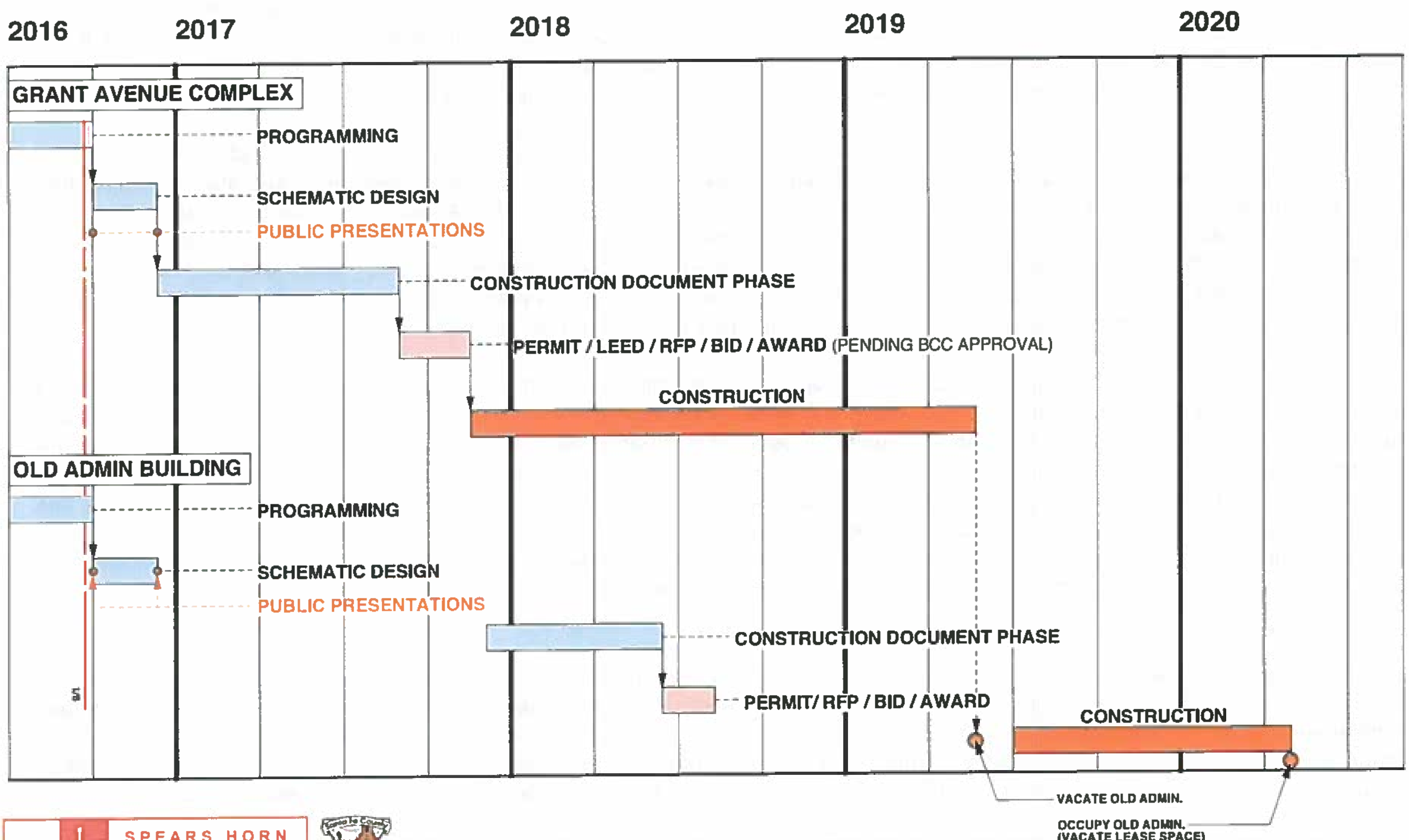
It is important that the building defines an urban street edge along Grant Avenue, while keeping most of the building exposure open to the south. This makes the most direct pedestrian connection to the Old Administration Building and positions the building for the best solar gain exposure. The potential site areas beyond the building are 1) sidewalk / tree areas along Grant Avenue and Catron Street, 2) public parking and formal building entry, 3) landscape and pedestrian buffer zones along the Presbyterian Church edge and Griffin Street. We intend to provide wide sidewalk areas, a generous 12' to 16' wide, on Grant Avenue and Catron Street, which can include appropriate street trees and public sitting / resting areas. The building is to have adjacent covered areas, such as portals, porches and canopies.

Public parking above ground, along with below grade parking for county employees has been mandated by Santa Fe County. Providing safe, visually clear pedestrian pathways through the site and public parking area is an important aspect of creating an inviting site. Access to public transportation and providing facilities that encourage riding a bike to work are encouraged. This facility will include showers, lockers, a fitness center and a bike corral. The goal is to create a healthy office environment and a responsibly planned site with indigenous plants and trees interspersed through the parking area and entry sequence.

See page 15 for a description of alternates:
- Alternate 1: Expanded Garage
- Alternate 2: Daycare

OVERALL ESTIMATED SCHEDULE

The Old Administration Renovation and Grant Avenue Complex projects are currently in the programming and analysis process and will move through design and into construction of the Grant Avenue Complex by the end of 2017 / the beginning of 2018. Construction of the Grant Avenue Complex is planned to be complete by summer of 2019. The Old Administration Renovation will move into construction once the Grant Avenue Complex is operational and staff have been relocated. The Old Administration Renovation project is planned to be complete by the end of 2019 to the beginning of 2020. See schedule below for reference.



 dg SPEARS HORN ARCHITECTS

PROGRAMMING NARRATIVE

Facility programming is the process that defines the specific scope of work to be designed. It is based on determining the operational goals and spatial needs of project components. The final product serves as the basis for the facility design, and typically includes: a list of spaces by name, number and size; a description of adjacency requirements; and identification of special accessibility, technology, security and environmental requirements. Programming interviews were conducted between April 28, 2016 - May 18, 2016.

Programming should not be affected by the type of facility being designed. Whether the facility is new, existing or historic landmark, the program for space will be the same. The only difference between a new or an existing facility is in a new facility, the designer shapes the space around the programmed components versus in an existing, the existing physical layout (walls, spaces or historical components) generally shape the components.

In order to facilitate the programming process, a set of Space Standards was developed for Santa Fe County by the design team. Space Standards are derived from various sources. Many states and counties throughout the county publish space standards that can be utilized by other government agencies as needed. The states of New Mexico, California, Florida, Virginia, Colorado and others have published space standards. The Federal Government General Services Administration (GSA) also publishes standards that may be used by others in programming their facilities. Many counties throughout the states will publish the standards they intend to use on specific projects; courthouses are a good example of this. The project space standards (see table this sheet) is based on tested standards used in many similar jurisdictions throughout the country and deemed appropriate for the County Administrative Offices by the design team.

No.	Space Standard	Standard No.	Size	Comment
1	Private Office	PO - 1	224 S.F.	Elected Official; County Manager; Probate Judge
2	Private Office	PO - 2	180 S.F.	Division Director; Manager
3	Private Office	PO - 3	144 S.F.	Administrator
4	Private Office	PO - 4	120 S.F.	Professional; Programmer
5	Private Office	PO - 5	100 S.F.	Administrative Assistant
6	Work Station	WS - 1	140 S.F.	
7	Work Station	WS - 2	120 S.F.	
8	Work Station	WS - 3	80 S.F.	
9	Work Station	WS - 4	64 S.F.	
10	Work Station	WS - 5	48 S.F.	
11	Coffee Bar Break Area		40 S.F.	
12	Files	File-1	120 S.F.	
13	Files	File-2	90 S.F.	
14	Files	File -3	60 S.F.	
15	Small Conference Room	C-1	120 S.F.	Seats 2-4 people
16	Small Conference Room	C-2	150 S.F.	Seats 4-6 people
17	Medium Conference Room	C-3	180 S.F.	Seats 6-8 people
18	Medium Conference Room	C-4	210 S.F.	Seats 8-10 people
19	Medium Conference Room	C-5	240 S.F.	Seats 10-12 people
20	Large Conference Room	C-6	280 S.F.	Seats 12-14 people
21	Large Conference room	C-7	320 S.F.	Seats 14-16 people
22	Large Conference room	C-8	Varies	Use 16-20 NSF/Person

Project Space Standards Table

OLD ADMINISTRATION RENOVATION - MEP SUMMARY

FULL MEP ASSESSMENT IN APPENDIX

INTRODUCTION

The purpose of this report is to provide engineering evaluation/observation of existing mechanical, electrical, and plumbing (MEP) systems at the Santa Fe County Offices Old Administration Renovation. The information in this report is based on investigation of existing mechanical drawings, site observations, and discussions with maintenance staff. The information provided by the maintenance staff was critical to our understanding of the operation of these systems. No testing of systems or equipment was performed. A site visit and walk around was performed on May 2, 2016 with Santa Fe County and Design Group Architects. To the degree possible, Bridgers and Paxton observed locations and conditions of the Mechanical, Electrical and Plumbing (MEP) systems.

MECHANICAL

1. In general, most of the Heating, Ventilation, and Air Conditioning (HVAC) systems have reached the end of their expected/useful life span. We recommend removing existing HVAC system in its entirety and install a new HVAC heating and cooling system.
2. The new mechanical HVAC system will be designed in compliance with Section 15-3-36, Energy Efficiency Standards for Public Buildings, NMSA 1978 and will qualify for the Environmental Protection Agency's (EPA) ENERGY STAR.
3. Exhaust air from all the restrooms & janitor rooms at minimum rate required by code by new exhaust fans located on the roof.
4. Install new building Direct Digital Control (DDC) system for the building's HVAC system.
5. In the Courtroom / BCC Chamber, due to existing constraints the recommended HVAC system is as follows. The new HVAC system will consist of four (4) packaged single zone, constant volume rooftop air handler with full outside air dry bulb economizer, "free cooling", a direct expansion (DX) cooling coil, and a natural gas fired furnace heating section. Each RTU (roof top unit) will provide heating and cooling to the space. The return air ducts inside the existing walls will be reused to avoid existing wall renovations. Each unit will provide a minimum amount of outside air at all times as required for the number of occupants in each space. When outdoor ambient conditions are favorable, the use of outside air for free cooling is available for energy reduction.

The mechanical heating plant consists of a natural gas fired furnace section with an estimated efficiency of 80%. The mechanical cooling plant consists of direct expansion (DX) cooling package provided with each rooftop units. Each RTU will be provided with a thermostat, DDC electronic control and monitoring system.

Other Design Considerations:

- To upgrade & install the new ductwork & air distributions the existing ceiling will be removed and replaced with a new ceiling system.
- Some structural modifications and reinforcement may be required for heavier rooftop units and new roof penetrations.
- Additional cost of roof repairs, patching and walkway membrane.
- Valuable building space for mechanical equipment is conserved.
- Maintaining or servicing outdoor units is sometimes difficult, especially in the Santa Fe climate.

FULL MEP ASSESSMENT IN APPENDIX

INTRODUCTION

The purpose of this narrative is to define the MEP system design approach and general recommendations for the Grant Avenue Complex. The Grant Avenue Complex project will be approximately 68,000 s.f. to 70,000 s.f. of office space. This building will include spaces such as general offices, conference rooms, data center, storage and a below grade secure parking garage.

MECHANICAL

1. 2 HVAC options considered are the following:
   Option #1 - Variable Air Volume (VAV) (see figure 1)
   Option #2 - 4-pipe fan coil system
2. Once the building is designed an HVAC recommendation will be provided based on the above options.
3. Building plumbing systems will be designed for a 50+ year service life and will meet the County and relevant standards and codes for conservation and efficiency.
4. A wet pipe, automatic fire sprinkler system will be designed for the office facility with a dry pipe system to protect the parking garage.
5. All electrical systems will meet applicable codes and regulations and will be designed to minimize operational costs, to provide required access for maintenance, as well as to incorporate a measure of flexibility.
6. A Surge Protective Device (SPD) will be installed in the building to protect areas where computer loads are prevalent.
7. Exterior lighting will be provided at parking, walkways, landscaped areas and building entry areas and will meet the New Mexico Night Skies Protection Act.
8. Interior lighting will typically be LED recessed type fixtures
9. Lighting control design will consider ease of maintenance, energy efficiency, and suitability for the environment.
10. Fire detection and alarm system will be provided.

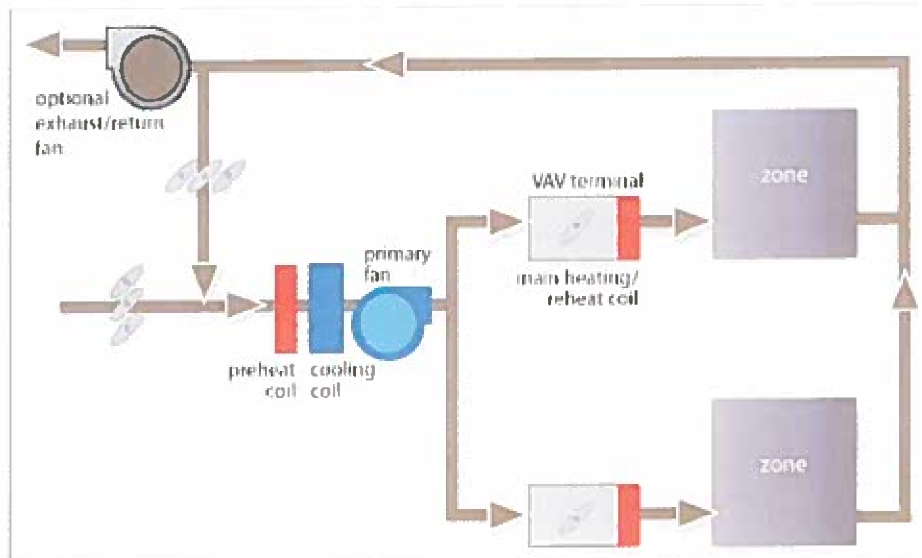


Figure 1 - Variable Air Volume (VAV) indoor air handler, Chilled Water and Hot Water coils

B

COST SUMMARY

CAO COST SUMMARY

2013 FEASIBILITY STUDY DATA - BASELINE OPTION 3B

OLD ADMINISTRATION RENOVATION

Building GSF 28,345 x $105 per SF
= $2,976,225
+ 15% Contingency = $446,434

TOTAL BASELINE CONSTRUCTION ESTIMATE W/ NMGRT
= $3,707,168

GRANT AVENUE COMPLEX

Site Work
= $1,058,200

329 Parking Spaces @ $20,000 per space
= $6,580,066

New Building GSF @ 72,292 SF x $190 per SF
= $13,735,480
+
Portals @ 2,933 SF x $35 per SF
= $102,655
= $13,838,135

Sub Total = $21,476,401
+ 10% Contingency = $2,147,640

TOTAL BASELINE CONSTRUCTION ESTIMATE W/ NMGRT
= $23,624,041

2016 PROGRAMMING REPORT DATA

OLD ADMINISTRATION RENOVATION

Building GSF 40,687 x $104.55 per SF
= $4,253,667
+
New Roof @ 19,447 SF x $25 per SF
= $492,009

Sub Total = $4,745,676

+ NMGRT (8.3125%) = $394,484

TOTAL CONSTRUCTION ESTIMATE = $5,140,161
(A 5% construction inflation rate per year is included through mid 2017)

GRANT AVENUE COMPLEX

Site Work
= $741,297

252 Parking Spaces @ $22,550 per space
30 on Grant Level + 222 spaces on Griffin Level
= $5,682,600

New Building GSF @ 71,266 SF
x $258.91 per SF
= $18,451,826

Sub Total = $24,875,723

+ NMGRT (8.3125%) = $2,067,794

TOTAL CONSTRUCTION ESTIMATE = $26,943,517
(A 5% construction inflation rate per year is included through mid 2017)

OLD ADMINISTRATION RENOVATION

Alternate 1 - Placita Restoration / 1970's Addition Removal

The proposed restoration of the Old Administration Building would include removing the two additions which in-filled the original placita on the north side of the building. This would include careful demolition, reestablishing window and door openings from the original design, new windows in these openings, repairing or replacing existing windows based on condition, re-stuccoing the entire building, new courtyard walls and gate, walkways and balconies, exterior two story stair, and landscaping the courtyard.

= $2,100,015

Procurement, ASD and HR move from OAR to GAC.

(SUBTRACT) Interior Remodel Cost of Procurement, ASD and HR removed from Old Administration Renovation

- $1,114,233

(ADD) New Construction Cost of adding Procurement, ASD, and HR to Grant Avenue Complex

+ $2,426,102

Total = $3,411,884

Alternate 2 - Landscape + Irrigation

The existing Old Administration Building has a limited amount of site features and landscaping. Alternate 2 would include improvements to landscaping all around the building especially on the South side of the structure. This area of the site is mostly barren other than a few trees. The addition of irrigation would ensure the health and longevity of new plants and trees.

= $49,795

Total = $3,749,432 w/ NMGRT

GRANT AVENUE COMPLEX

Alternate 1 - Expanded Garage

The baseline parking option does not accommodate all of the parking needs of the County based on Programmed FTE's and fleet (See page 34). Alternate 1 includes Grant Avenue level parking, Griffin Street level parking, and a one level below grade parking garage. This option would accommodate 312 parking spaces on site. 60 of which would be below grade. (60 parking spaces over the baseline option)

= 1,428,111 over Baseline Parking

Total = $1,546,823 w/ NMGRT

C

DEPARTMENT AREA DIAGRAMS

OLD ADMINISTRATION RENOVATION

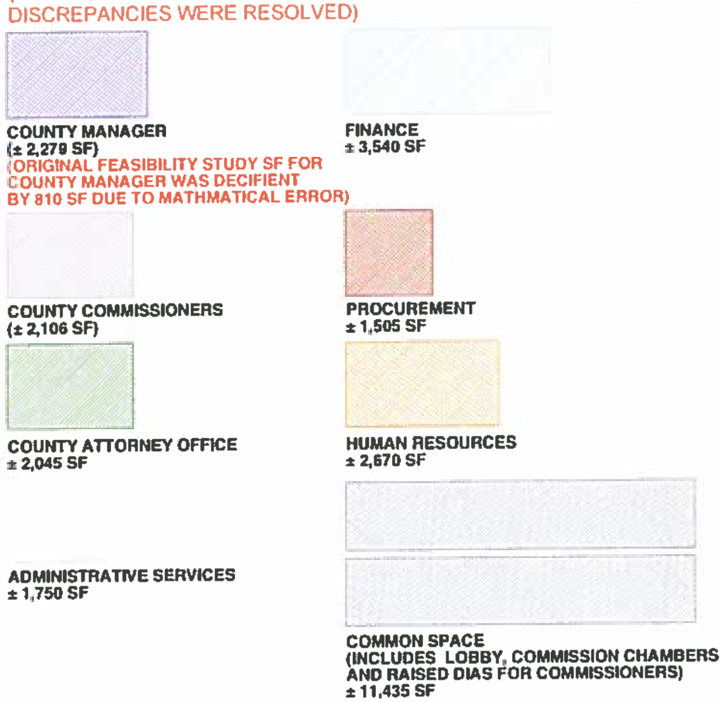
DEPARTMENT AREA DIAGRAMS

Below is a list of departments proposed to occupy the Old Administration Building at 102 Grant Avenue. Programming blocks have been used to show department size determined during the feasibility study completed in 2013 and compare those numbers against new numbers established through the programming interviews done in 2016. Proposed department size and FTE (full time employee) count increased for all departments. Shared conference rooms are included in the Common Space category. The basement is currently used for County Clerk storage, IT server space, mechanical and general building storage. According to the proposed programming space allocation, the existing Clerk storage is not needed so it will serve as general storage for the building.

BASELINE PROGRAMMING BLOCKS

DATA FROM FEASIBILITY STUDY - NOV. 2013

(REVISED BY ARCHITECTURAL RESEARCH CONSULTANTS, JAN. 2016 DISCREPANCIES WERE RESOLVED)



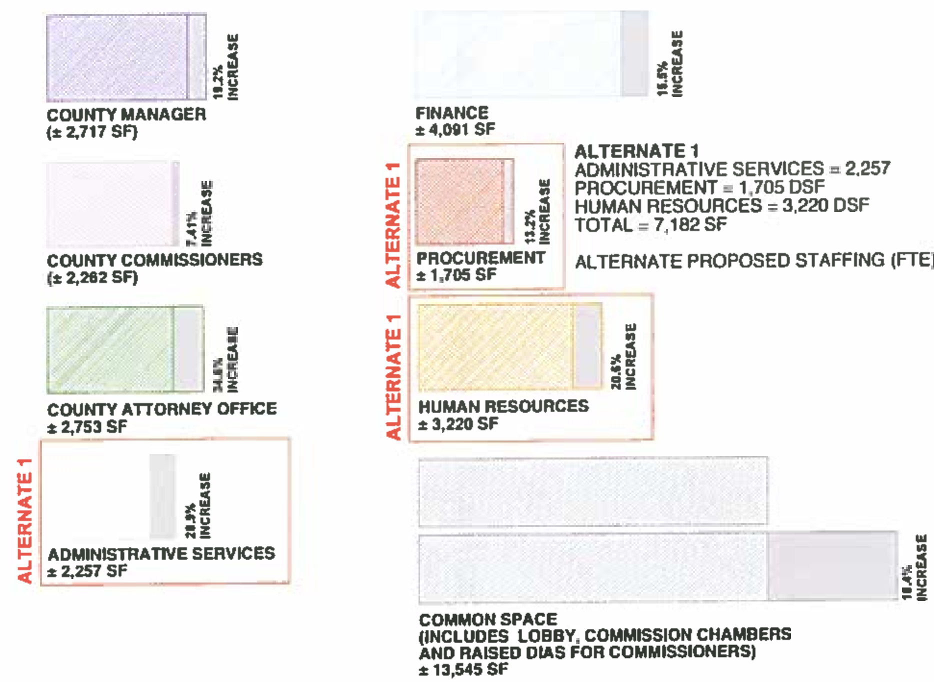
AREA TOTALS
DEPARTMENT GROSS TOTAL SF = 15,895 SF
BUILDING COMMONS = 11,435 SF
DEPARTMENT GROSS TOTAL = 27,330 SF

BUILDING GROSS SF = 34,162 SF

EXISTING STAFFING (FTE) = 73

PROPOSED PROGRAMMING BLOCKS

DATA FROM CAO INTERVIEWS - MAY 2016



ALTERNATE 1
ADMINISTRATIVE SERVICES = 2,257
PROCUREMENT = 1,705 DSF
HUMAN RESOURCES = 3,220 DSF
TOTAL = 7,182 SF

ALTERNATE PROPOSED STAFFING (FTE) = 18

AREA TOTALS
DEPARTMENT GROSS TOTAL SF = 18,849 SF
BUILDING COMMONS = 13,545 SF
DEPARTMENT GROSS TOTAL = 32,394 SF

BUILDING GROSS TOTAL = 40,492 SF

PROPOSED STAFFING (FTE) = 86

SF = SQUARE FEET

Below is a list of departments proposed to occupy the Grant Avenue Complex. Programming blocks have been used to show department size determined during the feasibility study completed in 2013 and compare those numbers against new numbers established through the programming interviews done this year. Proposed department size and FTE count increased for most departments. Alternate departments are shown including their square footages and FTE counts.

BASELINE PROGRAMMING BLOCKS

DATA FROM FEASIBILITY STUDY - 11/2013
(REVISED BY ARCHITECTURAL RESEARCH CONSULTANTS, JAN 2016 DISCREPANCIES WERE RESOLVED)

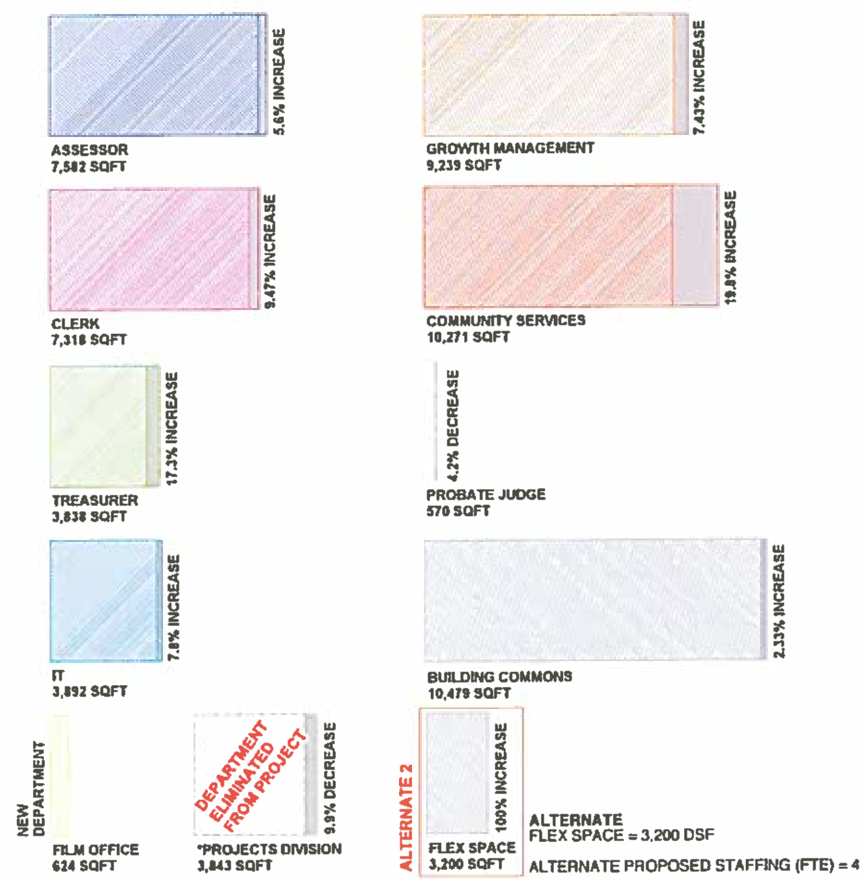
AREA TOTALS
DEPARTMENT GROSS TOTAL SF = 42,765 SF
BUILDING COMMONS = 10,240
DEPARTMENT GROSS TOTAL = 53,005 SF

BUILDING GROSS SF = 66,256
(ORIGINAL FEASIBILITY STUDY BSF WAS DECIFIENT BY 10,550 SF DUE TO MATHMATICAL ERROR)

EXISTING STAFFING (FTE) = 208

PROPOSED PROGRAMMING BLOCKS

DATA FROM CAO INTERVIEWS - 5/2016



ALTERNATE
FLEX SPACE = 3,200 DSF
ALTERNATE PROPOSED STAFFING (FTE) = 4

AREA TOTALS
DEPARTMENT GROSS TOTAL SF = 43,333 SF
BUILDING COMMONS = 10,479
DEPARTMENT GROSS TOTAL = 53,812 SF

BUILDING GROSS TOTAL = 67,266 SF

PROPOSED STAFFING (FTE) = 229

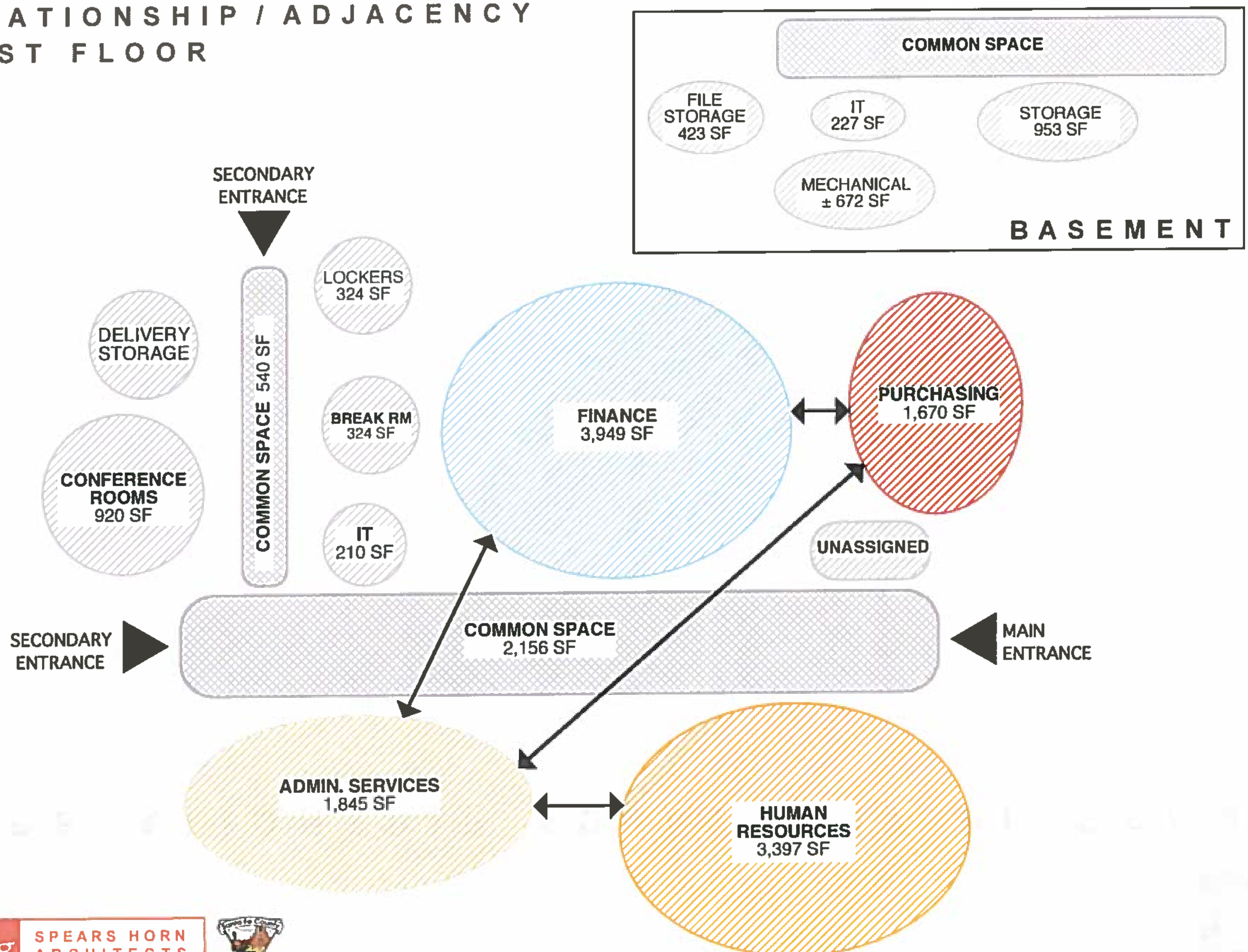
*PROJECTS DIVISION NOT INCLUDED IN TOTAL SF

D

RELATIONSHIP ADJACENCY DIAGRAMS

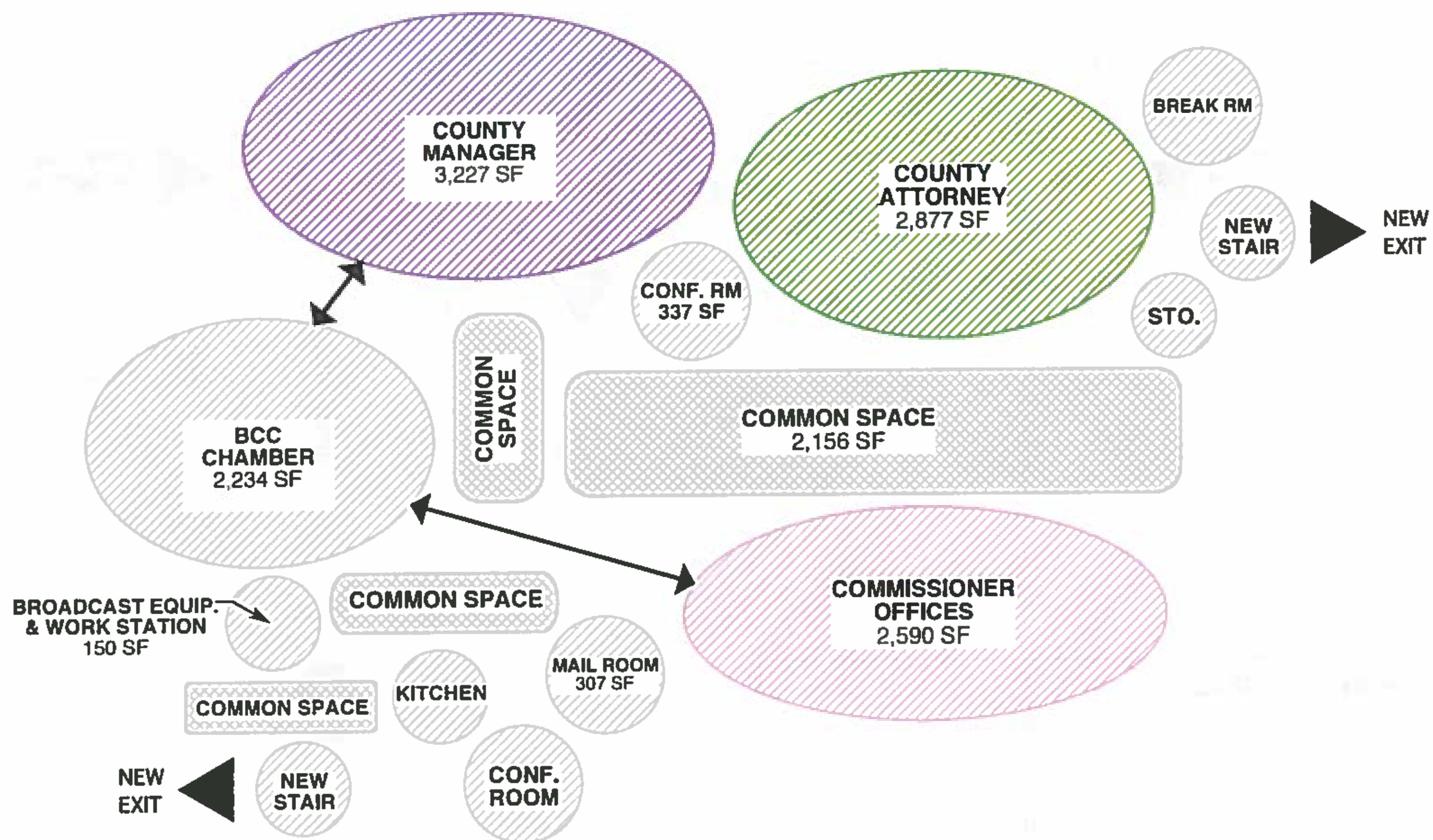
OLD ADMINISTRATION RENOVATION

RELATIONSHIP / ADJACENCY
FIRST FLOOR



OLD ADMINISTRATION RENOVATION

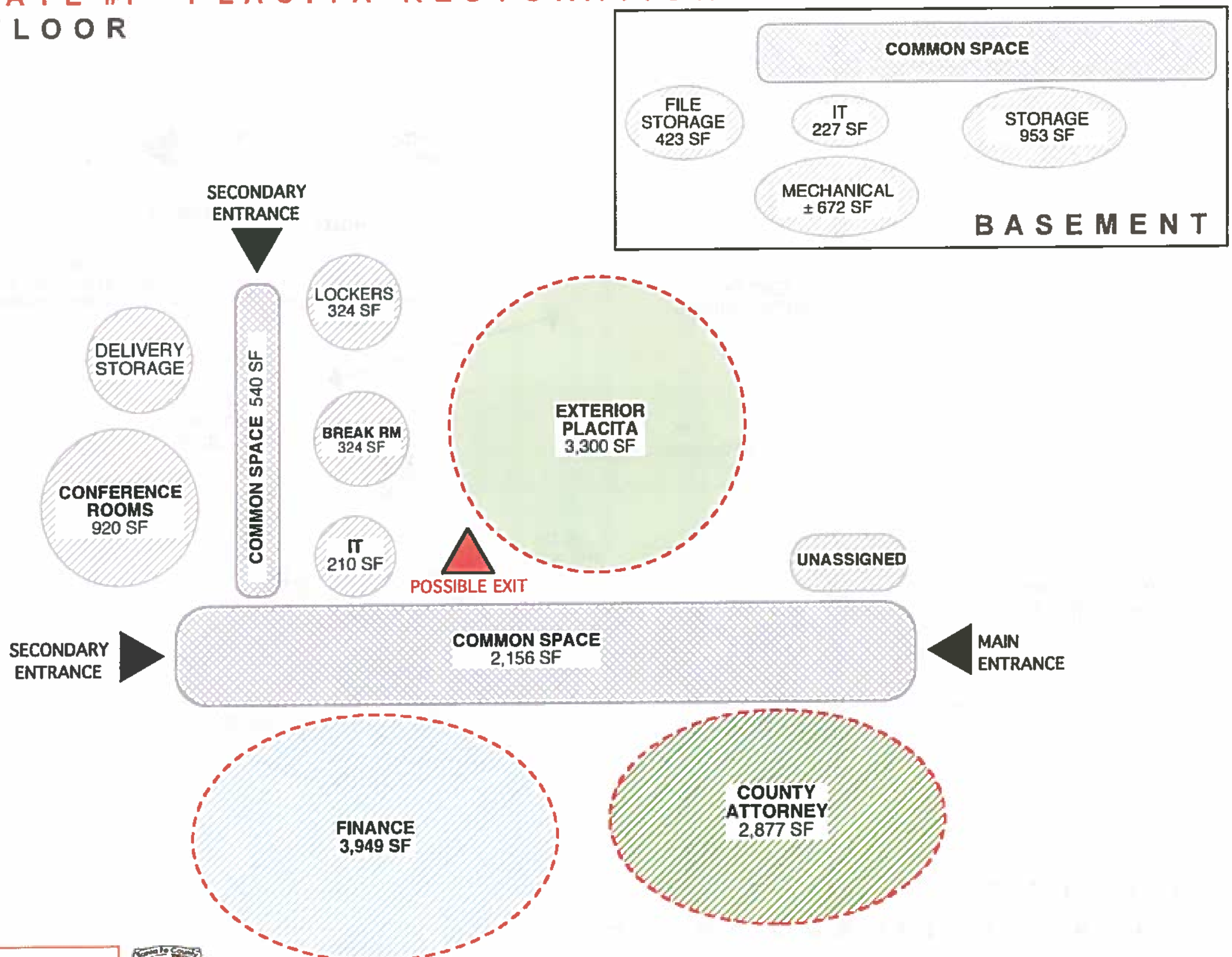
RELATIONSHIP / ADJACENCY
SECOND FLOOR



OLD ADMINISTRATION RESTORATION

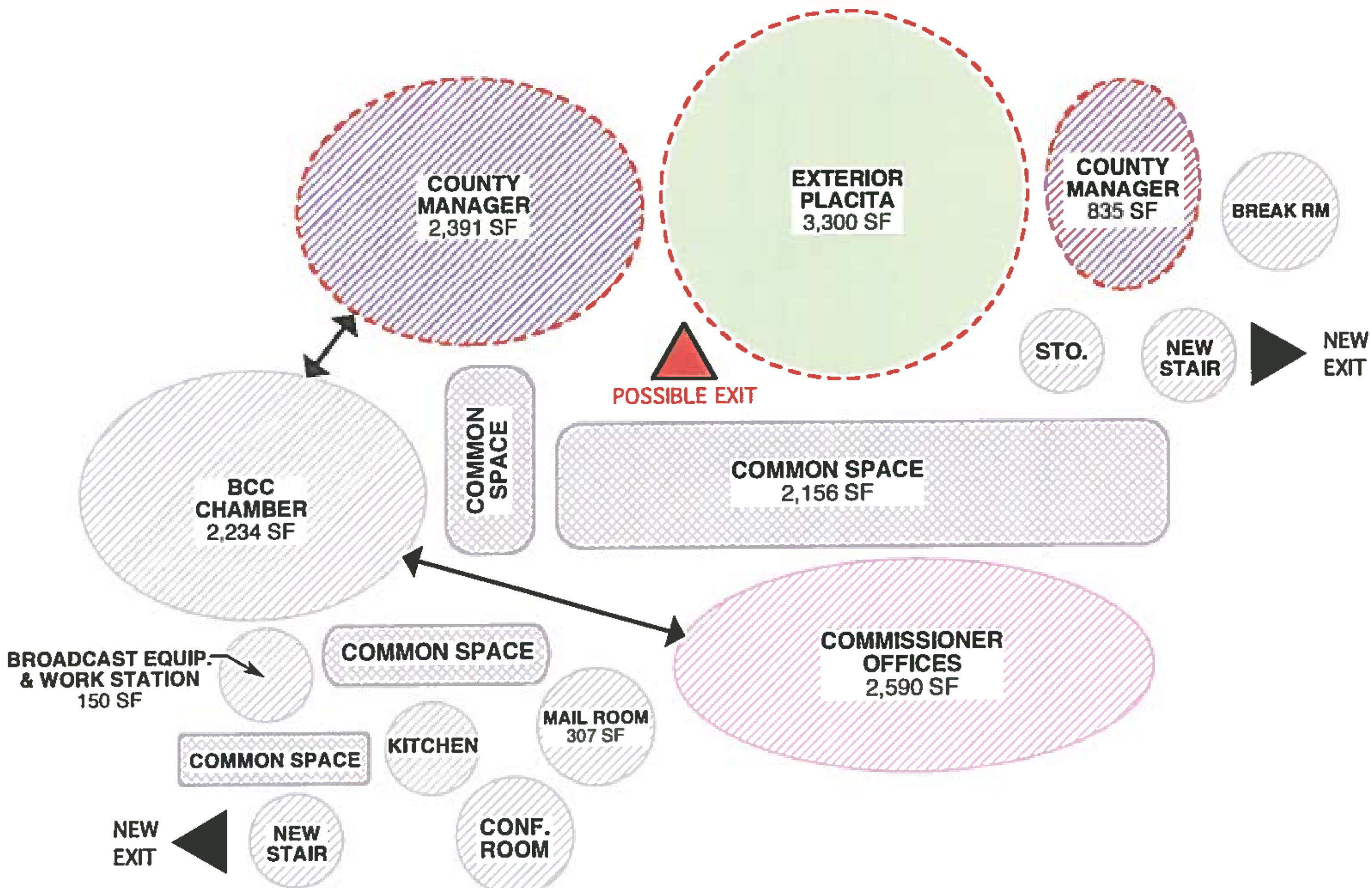
ALTERNATE #1 - PLACITA RESTORATION

FIRST FLOOR



ALTERNATE #1 - PLACITA RESTORATION

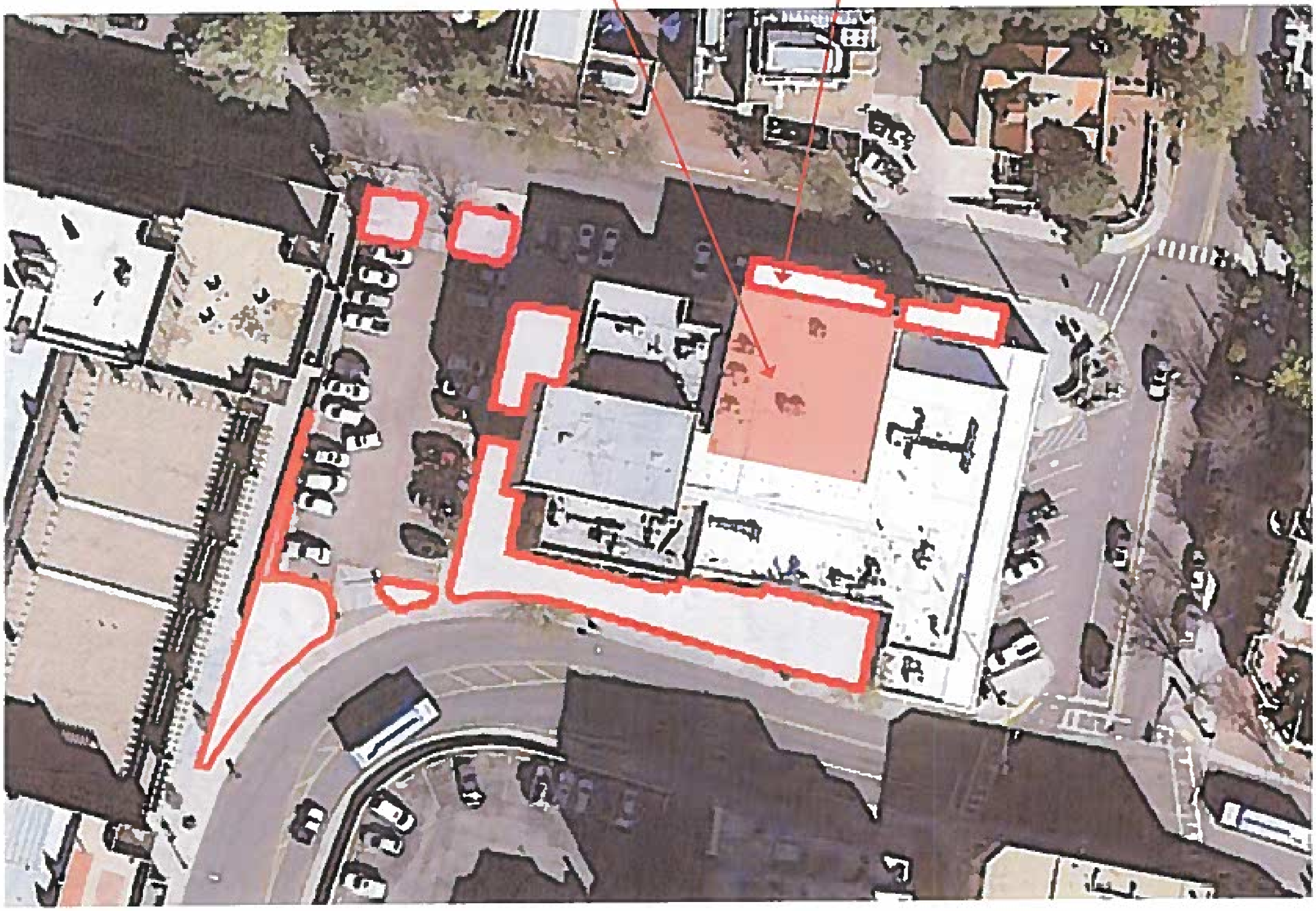
SECOND FLOOR



OLD ADMINISTRATION RENOVATION

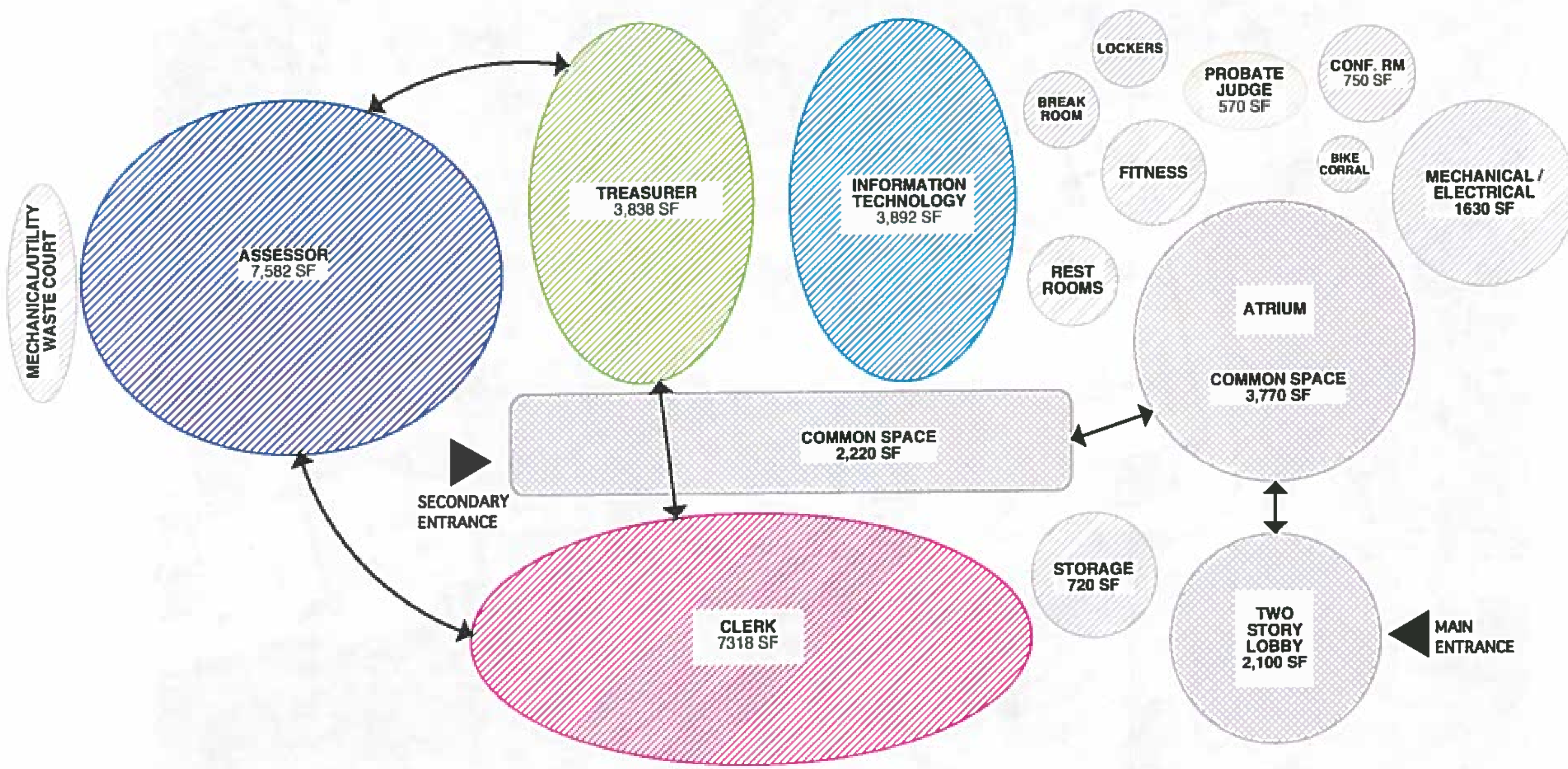
ALTERNATE #1 - PLACITA RESTORATION

ALTERNATE #2 - LANDSCAPE AREAS

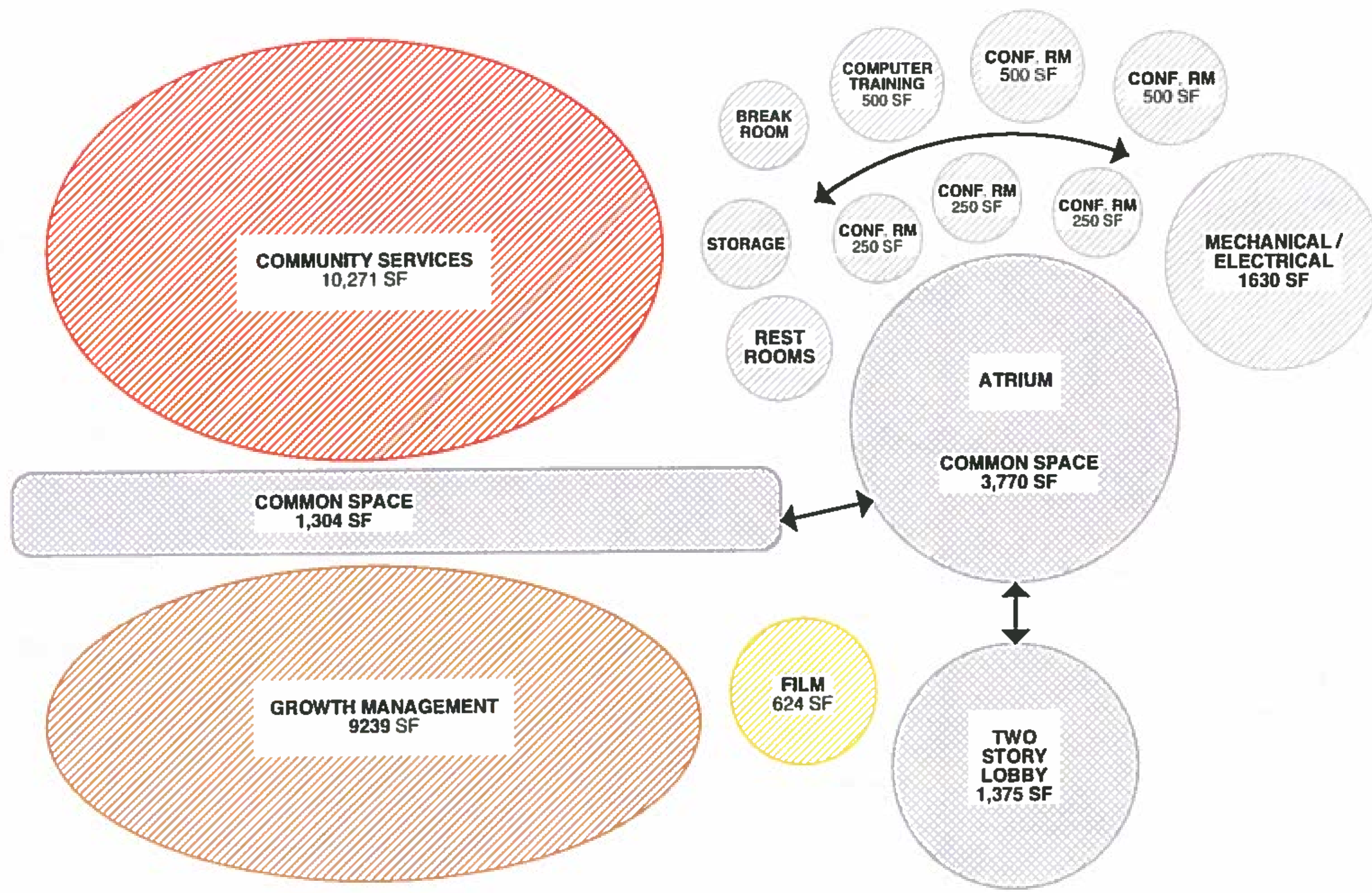


GRANT AVENUE COMPLEX

RELATIONSHIP / ADJACENCY
FIRST FLOOR



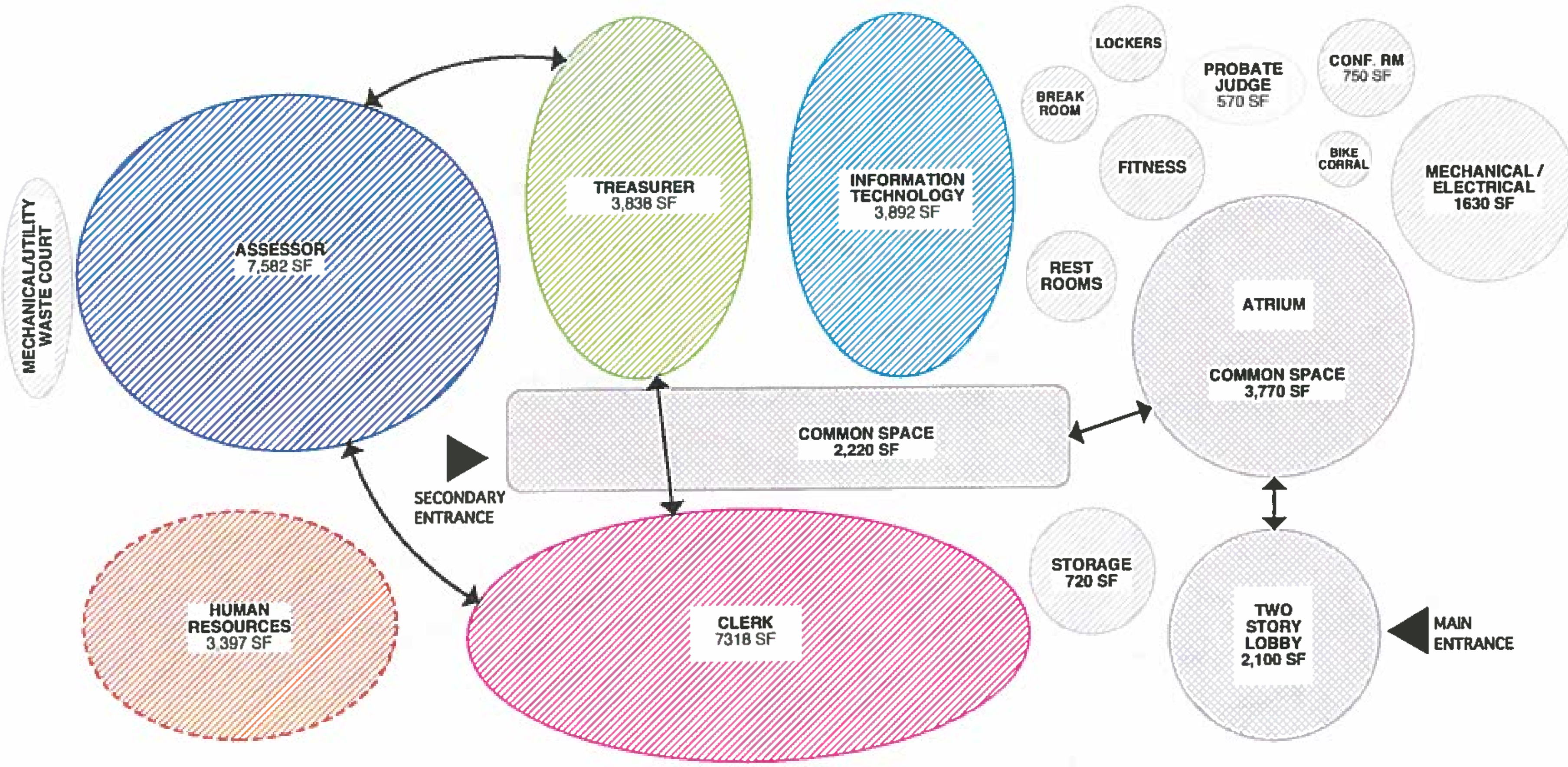
RELATIONSHIP / ADJACENCY
SECOND FLOOR



GRANT AVENUE COMPLEX

ALTERNATE #1 - ADDED DEPTS. FROM OLD ADMIN. RESTORATION

FIRST FLOOR

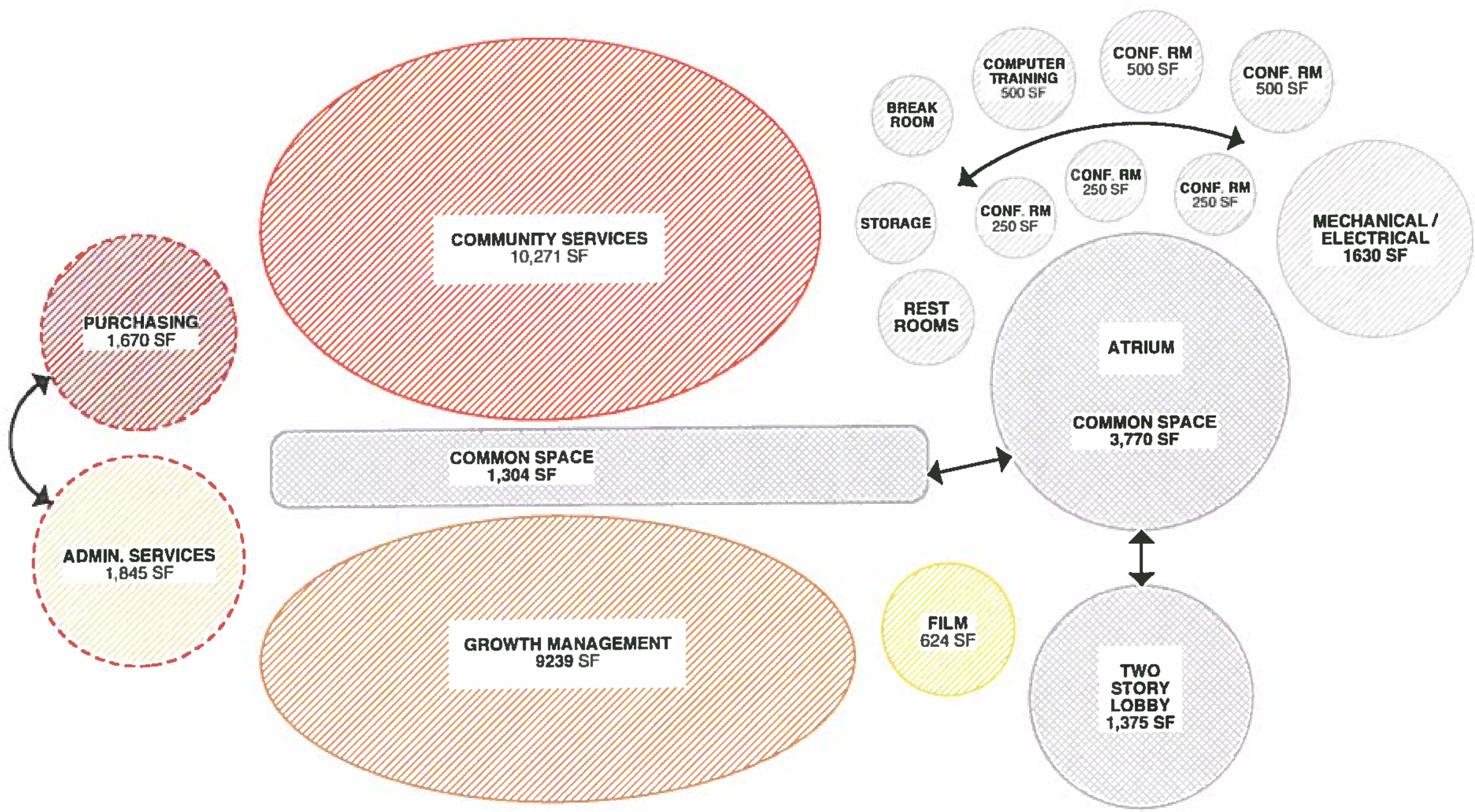


 dg SPEARS HORN ARCHITECTS

GRANT AVENUE COMPLEX

ALTERNATE #1 - ADDED DEPTS. FROM OLD ADMIN. RESTORATION

SECOND FLOOR



E

PARKING COMPARISON

P A R K I N G

A. CALCULATED BY EMPLOYEES (FTE's) + FLEET VEHICLES

OLD ADMINISTRATION RENOVATION

DEPARTMENT	EMPLOYEES	FLEET	
MANAGER'S OFFICE	11	0	
COMMISSIONERS	10	0	
ATTORNEY	11	0	
ADMINISTRATIVE SERVICES	10	0	(Confirm Fleet)
FINANCE	24	0	
PURCHASING	5	0	(Confirm Fleet)
HUMAN RESOURES	13	1	
BUILDING COMMON	2	0	
Sub Total	86	1	

GRANT AVENUE COMPLEX

DEPARTMENT	EMPLOYEES	FLEET	
ASSESSOR	51	24	
CLERK	36	1	
TREASURER	19	0	(Confirm Fleet)
IT	18	3	
GROWTH MANAGEMENT	47	11	
COMMUNITY SERVICES	50	20	(6) 8' high vans (1) RV
PROBATE JUDGE	2	0	(Confirm Fleet)
FILM	4	0	
BUILDING COMMON	2	0	
Sub Total	229	59	

COUNTY ADMINISTRATIVE OFFICES TOTAL

Total FTE Parking Spaces = 315 **Fleet = 60**

Alternates

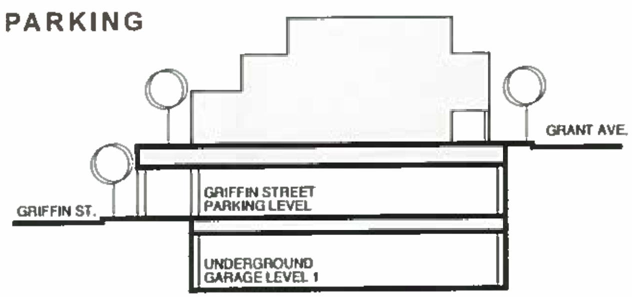
GRANT AVENUE COMPLEX

DEPARTMENT	EMPLOYEES	FLEET
FLEX SPACE	4	0
HOUSING	0	1
PUBLIC SAFETY	0	1
Alternates Total	**4**	**2**

PARKING SECTIONS

BASELINE PARKING

EXPANDED PARKING



B. CALCULATED BY EMPLOYEES ("ITE" Factor *)

315 (Total CAO FTE's) x 0.825 (Factor) = 260 Parking Spaces
(+) 30 New Public Parking Spaces
TOTAL = 290 parking spaces

(+) Fleet Possible = 60
TOTAL = 350 parking spaces

RECOMMENDATION

The Design Team recommends:

BASELINE PROPOSED

GRANT LEVEL (on grade) = 30 parking spaces
GRIFFIN LEVEL (below Grant level) = 222 parking spaces
(+) 38 Existing parking spaces at Old Admin
TOTAL = 290 parking spaces

EXPANDED UNDERGROUND GARAGE WITH FLEET

GRANT LEVEL (on grade) = 30 parking spaces
GRIFFIN LEVEL (below Grant level) = 222 parking spaces
BELOW GRADE PARKING FOR FLEET = 60 parking spaces
(+) 38 Existing parking spaces at Old Admin
TOTAL = 350 parking spaces

* The Institute of Transportation Engineers (ITE) is an international educational and scientific association of transportation professionals who are responsible for meeting mobility and safety needs. ITE facilitates the application of technology and scientific principles to research, planning, functional design, implementation, operation, policy development and management for any mode of ground transportation. Through its products and services, ITE promotes professional development of its members, supports and encourages education, stimulates research, develops public awareness programs and serves as a conduit for the exchange of professional information.

** Handicap spaces included in recommendation numbers.

OAR - EXISTING AERIAL

PARKING + SITE FEATURES

APPENDIX

Summary of Space - Old Admin. Building

Programming Estimate

Date of Estimate: June 21, 2016

revised 7/20/2016 - sha/dg - 7

Room ID		Net Assignable SF	Department GSF	Building GSF	$/SF	Total $
	Country Departments					
1000	Managers Office	2,090	2,717	3,396	104.71	355,619
1100	Commissioners	1,740	2,262	2,828	116.36	328,995
1200	County Attorney	2,118	2,753	3,442	106.16	365,366
1300	ASD - Admin & Risk	1,736	2,257	2,821	105.90	298,734
1400	Finance (Courtyard Addition Removal)	3,030	4,091	5,113	106.94	546,797
1500	Procurement	1,364	1,705	2,131	109.33	233,009
1600	Human Resources (Addition Removal)	2,477	3,220	4,025	108.61	437,183
	Building Commons					
1700	Building Commons/ Training/ Maintenance	12,211	13,545	16,931	66.93	1,133,139
	* Includes - (2) New Egress Stair					
	* Finance and HR moves to New Building					
	SubTotal - Old Admin. Building	**26,766**	**32,549**	**40,687**	**90.91**	**3,698,841**
Exterior Building Renovations						
	Remove and replace roof, to existing roof deck, includes minor deck replacement, single-ply modified		sf	19,447	22.00	427,834
	SubTotal - Old Admin. Building - Exterior Building Components - Add					**427,834**
	SubTotal - Old Admin. Building					**4,126,675**
	Estimator Contingency - 15%					619,001
	Base Total - Old Admin. Building					**4,745,676**
	GRT @ 8.3125%					394,484
	Base Total - Old Admin. Building with GRT					**5,140,161**

dg SPEARS HORN ARCHITECTS

ALT 1	**Removing Addition / Rebuilding Placita**					
	* Demo			7,200	35.00	252,000
	*Egress Stair		LS	1	120,000.00	120,000
	* New Elevator					125,000
	* Exterior Facade					500,000
	* Landscape					80,000
	Window Repair and Replacement / Ext. Windows / Stucco					
	* Add for Exterior Stucco Replacement/repair to backing			17,829	30.00	534,870
	* Window/door repair in place, strip and paint/stain, historic restoration			1,375	45.00	61,875
	* Window/door repair remove, restore, reinstall, strip and paint/stain,			499	145.00	72,355
	* Window/door replacement, match existing, historic renovation			640	125.00	80,000
					SubTotal	**1,826,100**
REMOVE INTERIOR REMODEL COST FROM OLD ADMIN RENOVATION (-)						
	1300 ASD	1,736	2,257	2,821	105.90	298,734
	1500 Procurement	1,364	1,705	2,131	109.33	233,009
	1600 Human Resources	2,477	3,220	4,025	108.61	437,155
					(-) SubTotal	**968,898**
ADD NEW CONSTRUCTION COST FROM GRANT STREET COMPLEX (+)						
	1300 ASD	1,736	2,257	2,821	235.00	662,935
	1500 Procurement	1,364	1,705	2,131	235.00	500,844
	1600 Human Resources	2,477	3,220	4,025	235.00	945,875
					SubTotal	**2,109,654**
					ALT 1 Total	**2,966,856**
ALT 2	Add for Landscape and Irrigation				**ALT 2 Total**	**43,300**
	SubTotal - Old Admin. Building Alternates					**3,010,156**
	Estimator Contingency - 15%					451,523
	Total - Old Admin. Building Alternates					**3,461,679**
	GRT @ 8.3125%					287,752
	Total with GRT - Old Admin. Building - Add Alternates					**3,749,432**

Summary of Space - Grant Avenue Complex

Programming Estimate

Date of Estimate: June 21, 2016
revised 7/20/2016 - sha/dg - 7

Room ID		Net Assignable SF	Department GSF	Building GSF	$/SF	Total $
	Elected Officials					
100	Assessor	5,616	7,582	9,477	228.58	2,166,282
200	Clerk	5,421	7,318	9,148	227.89	2,084,724
300	Treasurer	2,952	3,838	4,797	232.71	1,116,302
	Country Departments					
400	Information Technology	2,994	3,892	4,865	243.99	1,187,087
500	Growth Management	6,844	9,239	11,549	228.71	2,641,411
600	Community Services	7,608	10,271	12,839	229.43	2,945,581
700	Probate Judge	475	570	713	233.26	166,195
800	Film Office	520	624	780	236.77	184,680
	Building Common					
900	Building Commons/ Training / Maintenance	8,845	10,479	13,098	255.99	3,352,926
	Subtotal	**41,275**	**53,812**	**67,266**	**235.56**	**15,845,187**
Parking Garage Structure - Griffin Street Level (196) / Grant Avenue Level (62) = 258 total (full site)						
	Below-grade parking structure, retention and excavation - alternate		sf	14,163	65.00	920,563
	Below-grade parking structure, slab on grade, MEP, ramps - alternate		sf	72,636	40.00	2,905,440
	Below-grade parking structure, elevated slab, MEP, ramps - alternate		sf	36,172	40.00	1,446,880
	Subtotal - Parking Base			122,971		5,272,883
Sitework	Surface parking, includes drainage and lighting		sf	23,905	10.50	251,003
	Building exit/drive area		sf	2,809	12.00	33,708
	Sidewalk areas		sf	9,729	5.00	48,645
	Pocket Park		sf	3,055	35.00	106,925
	Landscape and irrigation		sf	22,250	10.50	233,625
	Subtotal - Grant Avenue Project - Sitework					673,906
	Subtotal - Grant Avenue Project					21,791,975
	Estimator Contingency - 10%					2,179,198
	Base Total - Grant Avenue Project					23,971,173
	GRT @ 8.3125%					1,992,604
	Base Total - Grant Avenue Project with GRT					**25,963,776**

ALT 1: Expanded Garage	Below-grade parking structure, retention and excavation		sf	22,500	65.00	1,462,500
	Below-grade parking structure, slab on grade, MEP, ramps		sf	48,600	40.00	1,944,000
	Below-grade parking structure, elevated slab, MEP, ramps		sf	48,600	62.00	3,013,200
	Subtotal - Grant Avenue Project - 1 Level Below Grade Parking					6,419,700
				Cost Above Base Parking		**1,146,817**
ALT 2	Flex Space	1,662	2,161	2,701	280.24	**756,860**
	Subtotal - Grant Avenue Alternates					**1,903,677**
	Estimator Contingency - 10%					190,368
	Base Total - Grant Avenue Project					**2,094,044**
	GRT @ 8.3125%					174,067
	Total with GRT - Grant Avenue Complex - Add Alternates					**2,268,112**

Henry P. Roybal
Commissioner, District 1

Miguel M. Chavez
Commissioner, District 2

Robert A. Anaya
Commissioner, District 3

Kathy Holian
Commissioner, District 4

Liz Stefanics
Commissioner, District 5

Katherine Miller
County Manager

MEMORANDUM

Date: August 23, 2016

To: Board of County Commissioners

From: Robert Griego, Planning Manager RG

Via: Penny Ellis-Green, Growth Management Director
Katherine Miller, County Manager

Item: **Presentation, Discussion and Non-Final Direction on Possible Amendments to the Affordable Housing Requirements of Chapter 13 of the Sustainable Land Development Code (SLDC). (Robert Griego/Growth Management)**

SUMMARY:
The purpose of this item is to provide additional information to the Board for consideration of possible amendments to Chapter 13 of the SLDC.

BACKGROUND:
On July 26th, 2016, the Board held a discussion on affordable housing in the County and considered a White Paper which provided a background of the program, identified issues and proposed options to address issues. The Board directed staff to get input from stakeholders to consider potential amendments. The County contracted with the Community Store as facilitators to conduct the focus group meeting. The Affordable Housing Focus Group meeting was held on August 18th and included representatives from affordable housing organizations, developers, an affordable housing homeowner, City and County staff. The Affordable Housing Focus Group Report is included in your packet as Exhibit A.

Proposed amendments and options to address affordable housing issues based on input from the Affordable Housing White Paper, Board discussion on July 26th and the focus group meeting on August 18th are identified below:

1) Amend Income Range Requirements as outlined in Section 13.2 of the SLDC.
2) Amend Long Term Affordability as outlined in Section 13.9 of the SLDC.
3) Amend Alternative Means of Compliance as outlined in Section 13.7 of the SLDC.
4) Amend Affordable Housing Incentives

Staff Recommendations:
Staff requests that the Board consider Options and direct staff to draft amendments to the SLDC as part of the 6 month update.

EXHIBITS

EXHIBIT A: Staff Recommendations and Options for Affordable Housing Amendments
EXHIBIT B: Santa Fe County Affordable Housing Focus Group Executive Summary

EXHIBIT

A

Staff Recommendations and Options for Affordable Housing Ame

1) Amend Income Range Requirements as outlined in Section 13.2 of the SLDC.

a. Income Range Option A: Combine Income Ranges 1 and 2 so there are 3 Income Tiers and maintain overall percentage of affordable units. This would result in the following percentage distribution of Affordable Units for Major and Minor Projects:

Table 1A: Combined Income Ranges 1 and 2 Example

Combined Income Ranges 1 and 2 Example	Minor Projects % 5 – 24 Lots	Major Projects % 25 or more Lots
Income Range 1 and 2 < 80% AMI	4	7.5
Income Range 3 81% to 100% AMI	2	3.75
Income Range 4 101% to 120% AMI	2	3.75
Total AH required by subdivision type	8 %	15 %

b. Income Range Option B: Weight Income Range 1 so each Income Range 1 home built would receive a credit for an additional affordable housing unit. For example, if the requirement for Affordable Units is 12 and the developer builds 3 Income Range 1 units, they would receive 3 credits which would reduce the amounts required in the remaining Income Ranges.

Table 1B: Weighted Income Range 1 Example

Weighted Example: AH Units Required for each Income Range	AH Units Example Project Current Requirements	AH Units Weighted Example Project
Income Range 1 <65% AMI	3	3 AH Built + 3 Credit
Income Range 2 66% to 80% AMI	3	~~3~~ 2
Income Range 3 81% to 100% AMI	3	~~3~~ 2
Income Range 4 101% to 120% AMI	3	~~3~~ 2
Total AH required	12 AH Units	9 AH Units Built + 3 AH Credits = 12

c. Income Range Option C: Reduce the percentage of homes required for Income Range 1 for Minor Projects from 2% to 1 % and Major Projects from 3.75% to 2% and either increase percentage required for other Tiers or reduce total percentage required.

Table 1C: Income Range 1 Percentage Reduction Example

Income Range 1 Percentage Reduction	Minor Projects % 5 – 24 Lots	Major Projects % 25 or more Lots
Income Range 1 <65% AMI	~~2~~ 1	~~3.75~~ 2
Income Range 2 66% to 80% AMI	~~2~~ 3	~~3.75~~ 5.5
Income Range 3 81% to 100% AMI	2	3.75
Income Range 4 101% to 120% AMI	2	3.75
Total AH required by subdivision type	8 %	15 %

2) **Amend Long Term Affordability as outlined in Section 13.9 of the SLDC:**

a. **Income Range 4 Option A.** Allow Income Range 4 homes to be sold by developer without a requirement for a mortgage or lien in favor of the County. This option would only require a lien if the purchase price of the home was above the price established in the Affordable Housing Regulations. This proposed option would still require that the County certifies income eligibility and that the home was sold to an Income Range 4 buyer at or below the Target Housing Price for the income range of the Eligible Buyer.

b. **Affordability Lien Option B.** Allow affordability lien to be held by nonprofit organization in place of Santa Fe County. This option would need to be refined to ensure that funds received through the liens would be used for direct assistance in alignment with the County affordable housing goals and not be used for operations.

3) **Amend Alternative Means of Compliance as outlined in Section 13.7 of the SLDC.**

a. **Alternative Means of Compliance Option A:** Provide flexibility to allow rental units as an alternative to meeting the affordable housing requirements. This may require amendments to SLDC or affordable housing regulations to incorporate language to ensure rental units meet regulatory requirements in partnership with the County Housing Authority.

4) **Amend Affordable Housing Incentives:**

a. The affordable housing regulations include affordable housing incentives. There was general agreement in the Focus Group that the County should examine its incentives. Staff recommends reviewing incentives with stakeholders in order to address existing and potential incentives.

EXHIBIT

B

Santa Fe County
Affordable Housing Focus Group
Executive Summary

Fourteen focus group members, including County and City staff, affordable housing professionals, residential developers, and an affordable housing homeowner, met on August 18, 2016, to provide input on Santa Fe County's affordable housing regulations and the proposed options for consideration outlined in a staff white paper.

Focus group members agreed about the need to make Santa Fe County's policies more flexible and responsive to the changing market and affordable housing needs. They supported, with more analysis and discussion, adjusting the Income Range Levels in the affordable housing regulations. They supported the idea of County support of affordable rental, but said that the idea as outlined in the staff white paper needs more analysis and development. They also supported, with more information and analysis, the possibility of the County partnering with a non-profit, non-profit holding of liens, and amendments to affordable housing incentives.

Given the current economic conditions and the information available about the ideas, focus group members did not support expanding inclusionary zoning requirements to include multi-family residential or amending the affordable housing area to SDA-1 only.

The Community Store
425 West San Francisco Street, Santa Fe, NM 87501
505.603-8877

Santa Fe County
Affordable Housing Focus Group
Meeting Summary Report

MEETING TIME AND LOCATION: August 18, 2016; 4:00 PM
Nancy Rodriguez Community Center

PARTICIPANTS

- Rosemary Bailey, Santa Fe County Affordable Housing Specialist
- Robert Griego, Santa Fe County Planning Manager
- Alexandra Ladd, City of Santa Fe Housing Special Projects Manager
- Mike Loftin, Executive Director, Homewise
- John McCarthy, La Pradera and Gardner Associates, LLC Member
- Joe Miller, Developer
- Joseph Montoya, Interim Housing Authority Executive Director
- Joe Ortiz, Developer
- Lorena Rascon, Homeowner
- Donna Reynolds, Santa Fe Realtor's Association Government Affairs Director
- Ted Swisher, Executive Director, Habitat
- Cass Thompson, Rancho Viejo Manager
- Warren Thompson, Rancho Viejo
- Sharron Welsh, Executive Director, Community Housing Trust

FACILITATORS

- Carl Moore
- Jessie Lawrence

MEETING NARRATIVE SUMMARY

The purpose of this focus group was to gather input on Santa Fe County's affordable housing regulations and the proposed options for consideration outlined in a staff white paper. Meeting participants responded to an initial list of ideas and also discussed other ideas about potential changes.

The focus group members discussed the need to make Santa Fe County's policies more flexible and responsive to the changing market and affordable housing needs. They supported, with more analysis and discussion, adjusting the income range levels; options discussed included combining levels 1 and 2, weighting the levels, and/or adjusting the restrictions on level 4 to reflect market conditions. They supported the idea of County support of affordable rental, but said that the idea as outlined in the staff white paper needs more analysis and development. They also supported, with more information and analysis, the possibility of the County partnering with a non-profit, non-profit holding of liens, and amendments to affordable housing incentives.

Given the current economic conditions and the information available about the ideas, focus group members did not support expanding inclusionary zoning requirements to include multi-family residential or amending the affordable housing area to SDA-1 only.

Focus group members also discussed new ideas outside of the staff white paper, including the need for a mechanism to respond to market changes so income levels and prices can change as necessary, and the need to keep the costs of affordable housing from being too onerous on developers if the market changes.

Focus group members expressed interest in being part of an additional subgroup to discuss necessary analysis and ordinance amendments.

SUMMARY OF RESPONSES TO WHITE PAPER IDEAS

<u>White Paper Idea 1: Adjust Income Range levels.</u>

- Meeting participants seemed to agree that the affordable housing requirements should be modified because of the challenges for this income group and the high cost of serving Income Range 1 and because Income Range 4 can currently be served by market rate homes. Meeting participants discussed weighting the levels or reducing the number of Income Range levels, combining Income Ranges 1 and 2. Participants suggested that this idea should have more analysis and discussion.

<u>White Paper Idea 2: Adjust Income Range 1.</u>

- Meeting participants discussed reducing the number of Income Range levels by combining Income Ranges 1 and 2. In this option, the requirements for major projects would remain 15% with 7.5% at <80% AMI, 3.75% at 81-100% AMI, and 3.75% at 101-120% AMI.
- Another option raised was to weight Income Range 1, so each Income Range 1 home would count at a higher rate (i.e. each Income 1 Range home would count at a higher rate such as 1.5 or 2 homes).
- Meeting participants agreed that there is a high cost to meet the needs of <65% AMI and supported the idea of more research to determine the best way to address this.

<u>White Paper Idea 3: Allow Income Range 4 homes to be sold by developer with only a requirement that County certifies income eligibility and homeowner counseling.</u>

- Most people seemed to support a policy that would reduce County requirements if the market price is equal to the affordable price, but expressed caution that developers sell homes to Income Range 4 buyers. A concern was raised regarding whether potential homebuyers would choose to go through the certification process without some sort of incentive.

<u>White Paper Idea 4: Allow rental units as an alternative means of compliance to meet affordable housing requirements.</u>

- Most people expressed that the County should support affordable rental, but the homeownership strategies and the rental strategies should be separate. They suggested that this idea needs more research and development.

White Paper Idea 5: Expand inclusionary zoning requirements to include multi-family residential units.

- Most people opposed this idea at this time for varying reasons. Some expressed the concern that it would discourage multi-family development. Others expressed concerns about unmet need, the need for more information about the appropriate level of affordability in multi-family residential, and the need to consider long-term affordability.

White Paper Idea 6: Amend areas required for Affordable Housing to SDA-1 only, perhaps with a requirement for subdivisions outside of SDA-1 to include a fee in lieu.

- Meeting participants generally opposed this because it would put the burden on an even smaller area of the county.

White Paper Idea 7: Partner with the Housing Authority or a non-profit to address rental requirements.

- Meeting participants supported the idea of creative and flexible ways to help get people in affordable homes, but thought this idea should wait until more work is done on Idea 4, above, about how to create flexibility to allow rental units as an alternative means of compliance.

White Paper Idea 8: Allow non-profits to hold liens in place of Santa Fe County.

- Meeting participants supported the idea of non-profits holding liens, as long as funds are used for direct assistance aligned with the County's affordable housing mission and not used for operations.

White Paper Idea 9: Amend affordable housing incentives.

- There was general agreement that the County should examine its incentives.

Other Ideas For Change Suggested by Focus Group Participants

- Simplify the ordinance, making it easier for developers and the public to understand.
- Spread the burden of funding for affordable housing more broadly, e.g. through GRT or property taxes.
- Create a flexible mechanism so prices are adjusted regularly based on AMI and interest rates.
- Ensure that the costs of affordable housing don't become too onerous on developers.

APPENDIX A: MEETING AGENDA

- Convening, Purpose of Meeting, Overview of White Paper
- Introductions
  - Day job
  - Connection to affordable housing
  - What's working in the current Santa Fe County affordable housing program?
  - What's not working in the current Santa Fe County affordable housing program?
- Respond to White Paper Ideas
  - Discuss ideas, including pros and cons
  - Assess level of support for different ideas
- Other Suggestions for Change
  - Discussion of ideas, including pros and cons
  - Assess level of support for different ideas
- Next Steps

White Paper Ideas Discussed

1. Adjust Income Range levels.
2. Income Range 1 Options:
   a. Reduce the percentage of homes required for Income Range 1 to 2% for major projects and 1% for minor projects, and either increase the percentage required in other tiers or reduce the total percentage of affordable housing.
   b. Delete Income Range 1, and either increase the percentage required in other tiers or reduce the total percentage of affordable housing.
   c. Allow a fee in lieu for Income Range 1 equal to the difference between the required sales price of the home and 95% appraised value, or equal to another set amount.
3. Allow Income Range 4 homes to be sold by developer with only a requirement that County certifies income eligibility and homeowner counseling.
4. Allow rental units as an alternative means of compliance to meet affordable housing requirements.
5. Expand inclusionary zoning requirements to include multi-family residential units.
6. Amend areas required for Affordable Housing to SDA 1 only, perhaps with a requirement for subdivisions outside of SDA-1 to include a fee in lieu.
7. Partner with the Housing Authority or a non-profit to address rental requirements.
8. Allow non-profits to hold liens in place of Santa Fe County.
9. Amend affordable housing incentives.

APPENDIX B: DETAILED RESPONSES TO FOCUS GROUP DISCUSSION QUESTIONS

Introduction Question 1: What is working well in the current Santa Fe County Affordable Housing Program?

- Housing has been built under the program.
- The integration of affordable housing across the county is important.
- Homebuyers are pleased.
- Lots are available to nonprofit developers at a reasonable cost.
- Down payment assistance program.
- Developer subsidy.
- Homebuyer training.
- Staff is dedicated and interested in doing innovative things.
- Rosemary Bailey is very responsive.

Introduction Question 2: What is not working well in the current Santa Fe County Affordable Housing Program?

- As a developer, cannot produce houses at these prices, even with outside subsidies.
- Hard to match people with financing.
- The market side of the model doesn't exist the way it used to, and so the subsidy to the affordable side is no longer there.
- The affordable housing ordinance stopped development in Eldorado, because it created too much loss on each new house. Eldorado should be exempted like, e.g., Rowe, Galisteo, and Stanley.
- The increasing cost of doing affordable housing is the biggest hurdle.
- The program is not sustainable as it's currently constructed.
- We need to look at the details of why we have a problem and how best to solve it; there is still a problem, e.g. the number of cops still driving out of the county.
- Most of the affordable housing is located in the Community College District, and there isn't much development outside of that area.
- The County ordinance needs simplification, and rather than having rigid criteria, it needs to provide the flexibility to work with people and provide creative solutions.

Responses to White Paper Idea 1: Adjust Income Range levels.

- *Summary: Meeting participants seemed to agree that the affordable housing requirements should be modified because of the high cost of serving Income Range 1 and because Income Range 4 can currently be served by market rate homes. Meeting participants discussed weighting the levels or reducing the number of Income Range levels, combining Income Ranges 1 and 2. The requirements for major projects might then be 7.5% at <80% AMI, 3.75% at 81-100% AMI, and 3.75% at 101-120% AMI, with the highest income range currently met by market* *rate homes with some additional requirements. Participants suggested that this idea should have more analysis and discussion.*

- *Comments:*
    - One person stated that the 15% total requirement seemed reasonable compared to ordinances that ask for more, and it is necessary to work back from there to the average level of affordability possible.
        - One person stated that a 20% total requirement is accepted around the country, but the average income level served is slightly higher.
        - One person noted that 15% is acceptable, but questioned how much subsidy is necessary to achieve that 15%.
    - One participant suggested that there should not be a difference in the requirements for minor and major projects.
    - Meeting participants discussed the math of the affordable housing requirements, noting that for some projects, the developer must pay a fee in lieu rather than building and the income ranges don't necessarily make sense.
        - One person stated that the percentages and income ranges came from a 1974 code addressing rental housing, and they don't address the nuances of a project.
    - One person noted that when the ordinance was written, no one anticipated the decline in market prices or that 120% AMI would be above market rate for a home.
    - One participant suggested that Income Range 1 should be weighted so developers get more credit, as this range creates the biggest developer loss.
        - One person noted that there should be analysis to determine the correct weighting structure, including both market analysis and need analysis.
        - One person noted that there should be something to temper too much development in any one tier.
    - Meeting participants discussed reducing the number of Income Range levels, combining Income Ranges 1 and 2 but still keeping the 15% overall requirement. The requirements for major projects might then be 7.5% at <80% AMI, 3.75% at 81-100% AMI, and 3.75% at 101-120% AMI, with the highest income range currently met by market rate homes as discussed in the responses to White Paper Idea 3.
        - One meeting participant suggested that this will cost developers less, because they will be meeting the 80% AMI requirement rather than the 65% AMI requirement.

Responses to White Paper Idea 2: Adjust Income Range 1 (three options).

- *Summary: Meeting participants agreed that there is a high cost to meet the needs of <65% AMI and supported the idea of more research to determine the best way to address this. This discussion was combined with the discussion of adjusting the income range levels, above.*
- *Comments:*
  - One person stated that there is a dysfunction in the market for Income Range 1 buyers, because they get locked into that house by the County's second mortgage and they can never move up.
    - There was disagreement about this from others who stated there is fluidity in the market.
  - One person noted that there's a need to create housing for <65% AMI, but it's expensive to create. Developers should have more opportunities for choice.

Responses to White Paper Idea 3: Allow Income Range 4 homes to be sold by developer with only a requirement that County certifies income eligibility and homeowner counseling.

- *Summary: Most people seemed to support a policy that would reduce County requirements if the market price is equal to the affordable price, but expressed caution that buyers shouldn't get a windfall.*
- *Comments:*
  - One person stated that tier 4 is essentially a market rate unit, and a homeowner shouldn't have to sign a lien when getting nothing in return.
    - Another person noted that such buyers need an incentive to go through the process to be income-qualified.
  - One person suggested that if the affordable price is equal to market value, there should be no lien requirement.
    - Meeting participants discussed the issue of when the appraised value is higher than the selling price.
      - One person suggested that if the gap between the market value and the affordable price is too great, e.g. $50K, there must be a lien requirement.
      - One person stated that the City of Santa Fe's policy is that if the lien would be equal to or less than $10K, no lien is required.
    - One person noted that buyers should still need to meet income requirements for the developer to get credit.
  - One person said that if the home is being sold at market value, homeowner counseling might not be necessary.

Responses to White Paper Idea 4: Allow rental units as an alternative means of compliance to meet affordable housing requirements.

- *Summary: Most people expressed that the County should support affordable rental, but the homeownership strategies and the rental strategies should be separate. They suggested that this idea needs more research and development.*
- *Comments:*
    - One person suggested that the County should do more to support the affordable rental housing currently being built.
    - One person noted that subsidies are necessary to make rental housing feasible; the County needs to do more than make it an option.
    - One person stated that the homeownership policies and the rental policies should be kept separate and shouldn't be mixed.
        - Another person suggested that allowing substitution of rental for homeownership could eliminate the homeownership element, and affordable rental can be highly subsidized via federal sources.
    - One person suggested that if a developer provides land for an affordable rental development, that developer should get credit for supporting affordable housing.
        - Another person noted that this could be accomplished through the fee in lieu.

Responses to White Paper Idea 5: Expand inclusionary zoning requirements to include multi-family residential units.

- *Summary: Most people opposed this idea at this time for varying reasons. Some expressed the concern that it would discourage multi-family development. Others expressed concern about unmet need, the need for more information about the appropriate level of affordability in multi-family residential, and the need to consider long-term affordability.*
- *Comments:*
    - One person stated that this was just temporarily removed from the City policies.
        - Another person stated that City of Santa Fe policies require a fee in lien up front. Doing this allows developers to put the fee into the construction budget, making it easier to build into the project financing
    - One person stated that there must be other subsidies to make this work.
    - One person stated that if someone is proposing multi-family housing development, that development should meet some affordable housing requirements; whether a fee or a percentage of units, there should be something to demonstrate affordability.
        - One person suggested that there should be more study about what the level of affordability should be in multi-family projects.

- One person suggested that the County should provide financing assistance for multi-family to encourage its development.
- One person stated that this requirement would be one more obstacle loaded on developers, and it would prevent development rather than encouraging it. It's necessary to reduce barriers to increase supply.
- One person expressed the concern that if the Income Range 1 requirement is reduced and multi-family is eliminated, there is a demand that isn't being met.
- One person noted that subsidies and multiple financing sources are required to produce multi-family affordable units, and expressed concern about long-term affordability as requirements expire and units are flipped.
- One person noted that there is no objection to a developer who wants to build multi-family residential development.
- One person noted that there are very limited locations in the county with the necessary infrastructure for volume apartments.

Responses to White Paper Idea 6: Amend areas required for Affordable Housing to SDA-1 only, perhaps with a requirement for subdivisions outside of SDA-1 to include a fee in lieu.

- *Summary: Meeting participants generally opposed this because it would put the burden on an even smaller area of the county.*
- *Comments:*
  - County staff stated that the concern is that areas of the county outside of SDA-1 do not have adequate public facilities, and perhaps a fee in lieu would be more appropriate in these areas.
  - One person expressed the concern that this would make the pot even smaller and place the burden on an even smaller area.
  - One person stated that in Eldorado, 2.5 acres are required for one house, and it is unfair to require that much land for one affordable house.
    - Another person stated that the cost per lot might be similar in Rancho Viejo.
  - One person noted that the County shouldn't incentivize development where there isn't adequate infrastructure.

Responses to White Paper Idea 7: Partner with the Housing Authority or a non-profit to address rental requirements.

- *Summary: Meeting participants supported the idea of creative and flexible ways to help get people in affordable homes, but thought this idea should wait until more work is done on White Paper Idea 4, about how to allow rental units as an alternative means of compliance.*
- *Comments:*
  - A few participants noted that partnerships, flexibility, and creative thinking are positive things that should be encouraged.

Responses to White Paper Idea 8: Allow non-profits to hold liens in place of Santa Fe County.

- *Summary: Meeting participants supported the idea of non-profits holding liens, as long as funds are used for direct assistance aligned with the County's affordable housing mission and not used for operations.*
- *Comments:*
    - One person suggested that it would be fine for a non-profit to hold the liens if that non-profit builds or purchases the housing.
    - One person noted that non-profits, government agencies, and developers might all like to keep the liens as a resource.
    - One person stated that there should be a restriction that the money should be recycled to be used for new affordable housing, and should not be used for operations.

Responses to White Paper Idea 9: Amend affordable housing incentives.

- *Summary: There was general agreement that the County should examine its incentives.*
- *Comments:*
    - County staff stated that they have identified incentives that may not function as well as they could.
    - One person noted that the incentives are useful for development.

OTHER SUGGESTIONS FOR CHANGE

- One participant suggested that the affordable housing regulations should be able to be discussed simply, and recommended the goal, if there are changes made, of simplifying the ordinance in a way that is understandable both to developers and to the public at large.
    - Others expressed support for the ideas of simplicity and flexibility.
- One person stated that the burden to contribute to affordable housing in Santa Fe County shouldn't only be on new homebuyers, but should be spread across the community, e.g. through GRT or property taxes. When the housing market prices are only somewhat above affordable prices, the cost per unit is too great.
    - Another person stated that Albuquerque's affordable housing program is funded through a separate tax.
- One person suggested that affordable housing prices should be adjusted regularly based on interest rates and AMI.
    - Another person suggested that there is a need for a mechanism to respond to the market continuously, so income levels can change based on market dynamics and there is flexibility whenever the market improves or worsens.
        - Other meeting participants expressed agreement with this.
        - One person noted that there is a need to find a simple mechanism to do this.

  - Another person suggested using disposable income to define affordability.
- One person suggested that the County needs to address the maximum loss that a developer needs to take on affordable housing.
  - Another person agreed that there should be ways to adjust to changes in market conditions that could be overly onerous.
  - Another person noted that there are differences between builders of different sizes, and these differences need to be addressed.
  - One person suggested that the degree of loss needs to be equalized so everyone is treated the same, but administering that would be difficult.
    - One person noted that the County would need the details of each developer's actual costs, and local government shouldn't be involved in that.