CAIS Trustee Head Conference 2014
Developing a Successful Project Entitlements Team & Strategy
Today's Topics:

Overview of Entitlement Components and Team

Case Study: The Urban School Academic and Athletic Building

Lessons Learned

Questions and Answer Session
What are project entitlements and why do I need a team of consultants to help my school obtain them?
Two main components to obtaining approval to develop your project:

Governmental Agency Approval (Land-Use)

Your Neighbors and Community Groups (Outreach)
Make-up of Entitlements Team
Outside Consultants will generally include at a minimum:

- Land-Use Attorney—Agency Approvals
- Outreach/Public Affairs Consultants—Neighbors/Politics
- Architect and Appropriate Design Team
- Client Representative—Liaison between Team, City and School—Advisory position

Other Sub-Consultants May Include:

- Traffic Consultant
- Acoustical Engineer
- Soils Engineer, etc.
Governmental Agency oversight includes (California):

Local Planning Department:
- Zoning
- Design Review (depending on jurisdiction)
- Historic Preservation
- Conditional Use Permit

Local Planning Commission:
- Design Review
- Historic Review

Local Commissions

State Agencies
- Coastal Commission
- Fish and Wildlife
Governmental Agency oversight includes (California):

**CEQA: California Environmental Quality Act**
- Cultural and Historic Resources
- Traffic
- Noise
- Water, Air, etc.

**Levels of Environmental Review:**
- Categorical Exemption
  - Generally cheapest and fastest
- Mitigated Negative Declaration
  - Generally completed by local agency at a fairly reasonable cost and in a fairly reasonable time (usually less than one year)
- Environmental Impact Report
  - Generally requires costly outside consultants and a time consuming public process (usually more than a year)
Governmental Agency oversight includes (California):

CEQA Mitigated Negative Declaration Issues:
• Can include mitigation measures to reduce or eliminate significant impacts.
• Determination that after mitigation, the project will not have a “significant impact on the environment.
• Fair argument test: If substantial evidence supports a fair argument of a significant impact, an EIR is required.

Other Approvals Issues:
• Variance
• Special Exception
• Design Review
• Historic Preservation
• Rezoning or Text Amendment (Legislative)
• Planned Unit Development or PD Zoning
Non-Planning Agency Impact Includes:

- Neighborhood Associations
- Neighbors in general
- Political Organizations
- Politicians
- Other Schools
- School body

“The Bible tells us to love our neighbors, and also to love our enemies; probably because they are generally the same people.” — G.K. Chesterton
Case Study:
The Urban School Academic and Athletic Building
Project Highlights:

- Phase I: 4 story (2 program, 2 parking levels) 60,000 square foot athletic/student building with seven classroom spaces.
- Phase II: conversion of existing gymnasium to performing arts space.
- Parking garage (+/-75 Spaces)
- Urban Infill—residential and institutional surrounding fabric
- Historic building with rental unit moved and retained
- Proposed increase of enrollment from 380 to 420
- Property agreement with San Francisco Archdiocese
- Strong neighborhood organization
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Proposed Main Floor
Phase I and II
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Proposed Upper Floor
Phase I
• Head and Board assemble the entitlement team and hire appropriate consultants

• Internal members of the team: Director of Finance and Operations, Director of Communications and Marketing, Head of School

• The necessary expertise is specialized

• Identify the primary challenges your project faces

Identify strengths and opportunities you can leverage; in Urban’s case these include:

• Strong, community-recognized Service Learning program
• Strong recognition and awareness of Urban within the Haight Ashbury neighborhood, San Francisco, and the Bay Area
• A source of neighborhood economic stability
• Experienced school leadership
• Public awareness of the need for more options for San Francisco high school students
Know your neighborhood – key players, politics, traffic, etc. – in order to better understand potential concerns and objections to your project.

Three key elements of an entitlement plan:

I. Community Outreach Plan
   • Mobilize your internal stakeholders
   • Reach out to neighbors, both friends and opponents
   • Government Relations Plan
   • Research and learn who the key players are
   • Establish lines of communication
   • Know the entitlement process
   • Media Plan

Primary Goal: Build a Formidable Coalition of Support
II. Develop and hone a core set of strong messages and talking points in advance of the entitlement process and neighborhood outreach

Develop an FAQ and know your FAQ

Be able to answer questions authentically and non-defensively

It is critical for the Head of School to be the spokesperson

- Explains the project
- Outlines benefits for school and neighborhood
- Responds to questions and concerns

III. Proactive communication with neighbors and community groups is crucial

As spokesperson for the project, Head makes presentations to groups of neighbors and neighborhood associations well in advance of required submissions to city planning department

Start NOW to foster good relationships and to communicate with your neighbors and elected officials

Year-round community relations and neighborhood outreach – not just when you need something from them
The planning approvals process:
Neighborhood meetings may be a requirement of approvals
Environmental review—CEQA
  • Aiming for a Categorical Exemption
  • CEQA Issues:
    • Historic Resource
    • Transportation and Circulation
    • Bird-Safe Building Ordinance
    • Noise
    • Stormwater

Update to the Conditional Use Permit
  • Enrollment increase
  • New Facility

Planned Unit Development Process:
  • In San Francisco, properties over ½ acre
  • Allows project to be viewed as a whole with the existing campus included

Requires Planning Commission Approval
Where the design team fits in:

Design the project that will be presented to planning agencies, school community, neighboring community, etc.

• Issues:
  • How much neighborhood input is necessary; how much do you want?
  • When and how do you present your preliminary design?
  • Do you show more than you need to get what you want?
  • Hand drawn or computer rendered?

Create documents for planning department process
• Usually environmental process (CEQA) is first, followed by a Conditional Use Permit

Create presentation plans and images
• This is complicated by needing to design the project ahead of knowing all the parameters of the design—creating a good picture without restricting your project

Make project presentations to neighborhood, neighbor organizations and planning department meetings
Lessons Learned:
Beware of Making Agreements with Neighbors
Lessons Learned:
Some Cities Are Seeking Lost Revenue
Lessons Learned:
Ultimately, Do What you Have to Do
Be Good Neighbors Now (goes for Parents too!)
Develop the Entitlements Plan During Master Planning Process
Be Committed to What you are Proposing
Be Prepared--Get out in front of the Issues
Have the Entitlements Team in Place Before you go Public
Know Your Neighbors and Understand Their Issues
Develop Responses to Common Issues
Understand the Political Landscape
Work to Keep Local Planning on Your Side
If Possible, Keep the Community Aware of Your (Managed) Intentions
Be Careful Who You Make Agreements With
Questions and Answers
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