



January 22, 2018

Hon. Magdalena Carrasco, Vice Mayor  
City of San Jose  
200 E. Santa Clara Street, 18<sup>th</sup> Floor  
San Jose, CA 95112

**RE: January 23rd City Council Mtg., Agenda Item, No. 3.3  
Evergreen Senior Homes Initiative Petition Certification & 9212 Study**

Dear Vice Mayor Carrasco,

I am writing to you on behalf of San Jose Residents for Evergreen Senior Homes. As you know, the coalition of senior citizens, veterans, and community leaders proposed the Initiative last September, which will allow for the creation of a new housing community for independent seniors in San Jose's Evergreen neighborhood. The project would include up to 910 residential units, at least 20% of which must be designated as affordable, with a preference given to military veterans. You can learn more about the Initiative at [www.evergreenseniorhomes.com](http://www.evergreenseniorhomes.com).

Since the launch of the Initiative almost 5 months ago, San Jose's housing crisis has only gotten worse. Every day another media article is posted covering the devastating realities the housing crisis is bringing to City residents. The average cost of a house in San Jose during this period has risen by more than 10%, with the average cost of a home in Evergreen rising to over \$1,200,000 in December. With housing costs skyrocketing, primarily due to lack of supply, it has become far too expensive for many seniors to live in San Jose. The Initiative simply takes 200 acres of unused industrial land and upgrades it into senior housing designated for active, independent living. It will allow local seniors to age with dignity, while maintaining their independence and giving them an opportunity to remain near their family and friends.

We are pleased the initiative petition has been certified by the County Registrar of voters with more than 35,000 signatures submitted in less than ten weeks and that the City has not apparently taken any further public steps to thwart the will of voters on this matter. Evergreen Senior Homes Initiative supporters are committed to a transparent, truthful discussion about the Initiative with the public and welcome the City's completion of the "9212" report.

The Initiative includes a detailed specific plan which provides clear requirements for any future housing so the public can fully understand what is being proposed. We thoughtfully drafted the Initiative after assessing the many issues that are typically considered in a 9212 report. The housing plan was scoped and shaped by an extensive environmental assessment built upon comprehensive professional third party studies, including a detailed traffic impact analysis. We have delivered copies of this environmental study along with fiscal and economic impact analyses to the City and made them available to the public on our web site in mid-December.

P.O. Box 6569, San Jose, CA 95150 ■ [evergreenseniorhomes@gmail.com](mailto:evergreenseniorhomes@gmail.com) ■ (408) 345-5781 ■ [evergreenseniorhomes.com](http://evergreenseniorhomes.com)

Paid for by San Jose Residents for Evergreen Senior Homes, a coalition of Senior Citizens, Veterans, and Community Leaders; Committee major funding from Ponderosa Homes II.

Magdalena Carrasco, Vice Mayor  
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We are pleased to report that the Environmental Study clearly demonstrates the Evergreen Senior Homes community has no significant unavoidable impacts for the neighbors or wider community, and the fiscal and economic impact studies show a positive financial benefit to the City. In addition, we are including a memo from the fiscal consultant showing that project will generate at least \$3.85 million in revenue annually for local school districts without adding costs because the residential community is for seniors.

Equally important, the studies clearly demonstrate that most of the statements made by opponents of the initiative are simply false and misleading. Copies of the information we provided to the City summarizing these reports is attached to this letter along with the school district revenue memo.

Voters deserve to know that these reports, which show the clear benefits of the Evergreen Senior Homes proposal, are being incorporated by the City in the preparation of its 9212 Report. However, we remain concerned about the preparation of the 9212 Report and whether it can be done in an unbiased manner without improper political and administrative interference based upon recent past actions by the City.

All we ask for is a fair and unbiased execution of the City's duties and obligations so that voters can make their decision on the Initiative, which simply calls for senior housing on the unused industrial land to address San Jose's most significant challenge—housing its residents, especially seniors and veterans. San Jose voters have a right to decide this issue themselves on the merits, and to expect the City to recognize and acknowledge the initiative's benefits when discharging its duties under the City Charter.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jeff Schroeder", is written over the printed name.

Jeff Schroeder

cc: City Clerk

December 19, 2017

David Sykes, City Manager  
City of San Jose  
200 E. Santa Clara Street, 17<sup>th</sup> Floor  
San Jose, CA 95112

**RE: Transmittal of Environmental Study, Fiscal Impact Analysis & Economic Impact Study**

Dear Mr. Sykes,

As you know, San Jose Residents for Evergreen Senior Homes – a coalition of senior citizens, veterans, and community leaders – proposed the Initiative in September, which will allow for the creation of a new housing community for independent seniors in San Jose's Evergreen neighborhood. The project would include up to 910 residential units, at least 20% of which must be designated as affordable, with a preference given to military veterans.

We previously indicated the Committee's intention to provide environmental and financial studies to the public and the City for review and analysis, and so are releasing them today, six months in advance of the June 2018 election. This will afford voters ample time to fully study the Initiative proposal in more detail, consider possible effects of the Evergreen Senior Homes Specific Plan on the community, and make an informed decision based on real facts.

I am attaching a short memo which provides a summary of the studies, and am enclosing three copies of each the following:

- Evergreen Senior Homes Environment Study, November 2017  
(produced by multiple preparers)
- Fiscal Impact Analysis for the Evergreen Senior Homes Specific Plan, December 13, 2017  
(prepared by WILLDAN Financial Services)
- Evergreen Specific Plan Economic Impact Study, December 2017  
(prepared by WILLDAN Financial Services)

We are providing these comprehensive reports to the City to facilitate the Administration's preparation of a comprehensive, complete review of the Initiative in the 9212 Analysis the City Council has commissioned. The delivery of these studies should save the City significant staff time and money, allowing for quicker peer review, rather than directly undertaking or commissioning additional costly study. Based on the findings of these independent studies, we expect the City Administration's 9212 report will demonstrate the clear positive benefit of the Evergreen Senior Homes proposal for the community, so long as the analysis remains unbiased and free of political interference.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jeff Schroeder", is written over the word "Sincerely,".

Jeff Schroeder



DATE: December 19, 2017

TO: Friends & Interested Parties

FROM: San Jose Residents for Evergreen Senior Homes

RE: Release of Environmental Study & Fiscal/Economic Impact Reports

As you know, San Jose Residents for Evergreen Senior Homes – a coalition of senior citizens, veterans, and community leaders – proposed the Initiative in September, which will allow for the creation of a new housing community for independent seniors in San Jose’s Evergreen neighborhood. The project would include up to 910 residential units, at least 20% of which must be designated as affordable, with a preference given to military veterans. You can learn more about the Initiative at [www.evergreenseniorhomes.com](http://www.evergreenseniorhomes.com).

San Jose is in the middle of an unprecedented housing crisis. The Mayor recently acknowledged the City has been unable to effectively address this, saying “we must think big and act boldly to address this growing crisis.” We completely agree! With housing costs skyrocketing across the region, it has become far too expensive for many seniors to live in San Jose. The Initiative takes 200 acres of vacant land in a residential neighborhood that has been zoned industrial for over 40 years and upgrades it into senior housing designated for active, independent living. It will allow local seniors to age with dignity, while maintaining their independence and giving an opportunity for them to remain near their family and friends.

In just a few short weeks our coalition gathered more than 35,000 signatures supporting the Initiative and submitted them to the City on November 27, 2017 for verification. This represents far more signatures of San Jose voters than the 5% needed to qualify for the June 2018 election.

Supporters of the Evergreen Senior Homes Initiative are committed to a transparent and truthful public discussion about the benefits and potential impacts of Initiative. The Initiative includes a detailed Specific Plan providing clear requirements and legal obligations for any future housing so the public can fully understand what is being proposed.

Our legal team thoughtfully drafted the Initiative after assessing all issues that are typically considered in an Environmental Impact Report prepared in accordance with the California Environmental Quality Act. The housing plan was scoped and shaped by an extensive environmental study built upon comprehensive professional third party reports, including a detailed traffic impact analysis. In addition, we also studied the potential fiscal and economic impacts of the senior homes community. Each of the studies was prepared consistent with the standards of each professional discipline and the City’s typical environmental study requirements.

We previously indicated the Committee’s intention to provide these studies to the public and the City for review and analysis, and so are releasing them today, six months in advance of the June 2018 election. This will afford voters ample time to fully study the Initiative proposal, consider possible effects of the Evergreen Senior Homes Specific Plan on the community, and make an informed decision based on real facts, not fake news from opponents who do not support better housing options for seniors or veterans.



We are pleased to report that the Environmental Study clearly demonstrates the Evergreen Senior Homes community has no significant unavoidable impacts for the neighbors or wider community, and the fiscal and economic impact studies show a positive financial benefit to the City.

The Fiscal Impact Analysis, prepared by WILLDAN Financial Services, mirrors the model the City utilized for its most recent update of General Plan 2040, although the Evergreen Senior Homes report utilizes even more conservative assumptions for expenses and revenues. The analysis concludes that the Evergreen Senior Homes Specific Plan will generate net revenue for the City's General Fund of more than \$210,000 per year after full build out. This additional revenue will allow the City to pay for important municipal services that benefit Evergreen and other neighborhoods throughout the city.

An Economic Impact Study which accompanies the Fiscal Impact Analysis, details one time revenue for the county area during construction of \$624,000,000 and more than 3,000 jobs and ongoing generation of \$1,400,000 in economic benefit to the community each year thereafter.

The Environmental Study was prepared by many independent, professional consultants often engaged directly by the City, and follows the form of an Environmental Impact Report under CEQA that would be provided for any development project. The report studies a full range of significant considerations, especially traffic, and fully discloses the potential environmental effects associated with implementation of the Specific Plan and other changes proposed by the Initiative.

The Environmental Study's Traffic Impact Analysis considers potential traffic impacts prepared according to all City requirements; it clearly shows that the senior homes generate far less traffic than the industrial uses planned for the site, eliminating thousands of trips from Evergreen neighborhood streets. This is due in large part to the fact that residents over 55 have less than two people on average living in a home and drive far less often than the estimated 5,600 employees who would be traveling to and from work at the site under current city plans, especially during morning and afternoon commute times.

More importantly, due to the Initiative's inclusion of dozens of required Environmental Design Features (EDFs) including area-wide traffic improvements, the senior residential community will not create any significant unavoidable traffic impacts for the Evergreen community. These EDFs are legally binding obligations totaling millions of dollars which cannot be changed or eliminated.

A summary of key facts and findings of the Environmental Study is attached.

We are also providing these comprehensive reports -- which represent months of study and total thousands of pages of professional analysis -- to the City to facilitate the Administration's preparation of a comprehensive, complete review of the Initiative in the 9212 Analysis the City Council has commissioned. The delivery of these studies allows for quicker peer review by City professionals, rather than undertaking additional studies which will save the City significant staff time and money. Based on the findings of these independent studies, we expect the City Administration's 9212 report will demonstrate the clear positive benefit of the Evergreen Senior Homes Initiative, so long as the analysis remains unbiased and free of political interference.



### **Summary of Key Facts & Findings in Environmental Study**

The Evergreen Senior Homes Specific Plan Environmental Study – November 2017, discloses the potential environmental effects associated with implementation of the Specific Plan and other changes proposed by the Initiative. The independent, comprehensive analysis shows:

- ✓ With implementation of enumerated Environmental Design Features (EDFs) required by the Initiative, build out of the Specific Plan will have no significant unavoidable impacts on the environment.
- ✓ Implementation of the Specific Plan is subject to a legally required development review process to ensure conformance with the voter approved Initiative, Specific Plan and applicable City standards to minimize any impacts. This development review mechanism, which the City controls, ensures that future development under the Specific Plan will not result in unanticipated impacts not considered in the analysis.
- ✓ Aesthetics – The proposed development is compatible and consistent with land uses, architectural style and context of the surrounding neighborhood and does not impact scenic resources or vistas.
- ✓ Air Quality – The Specific Plan build out decreases pollutants considered under the 2017 Clean Air Plan and levels are also below all regulatory thresholds.
- ✓ Water Quality – Implementation of the Specific Plan would not violate any water quality standards or otherwise result in water quality degradation.
- ✓ Land Use – The Specific Plan residential development would be compatible with immediately adjacent uses, which are predominantly residential. With voter approval of the Initiative, the project would be consistent with the General Plan and Municipal Code, as amended, and so would not conflict with any applicable land use plan, policy or regulation.
- ✓ Population and Housing – The growth associated with the Specific Plan is not substantial, nor would it alter the city's jobs to employee-resident (J/ER) ratio or result in any unplanned growth. The Specific Plan area is a quasi-infill site, and the proposed development would be consistent with ABAG and MTC's Plan Bay Area.
- ✓ Public Services - Implementation of the Specific Plan will not adversely affect the City's ability to provide public services of any kind, including fire, police and libraries, and senior housing community creates no identified impacts on schools.
- ✓ Transportation – With 7 mandated traffic EDFs costing millions of dollars, all potential traffic impacts can be mitigated to a less than significant level under City standards without the payment of additional traffic fees.
  - The number of trips from the Senior Homes residential community under the Specific Plan is significantly less than the number of trips from the estimated 5,600 employees that the property could accommodate and that the City has already planned the road network to accommodate under existing allowed industrial uses on the property.
  - Specific Plan requires development to incorporate transportation demand management measures that promote carpooling, transit use, bicycle use and pedestrian activities.
- ✓ Energy Conservation - The Specific Plan requires rooftop solar panels and must comply with established Green Building Guidelines, so is not considered wasteful in comparison to other similar developments in the region from an energy perspective.
- ✓ Utilities – Projected water demand is less than half what would be required for industrial use of the site.
- ✓ There are no cumulative impacts to the environment created by implementation of the Specific Plan.

## Memorandum

**TO:** San Jose Residents for Evergreen Senior Homes

**FROM:** James Edison

**DATE:** January 21 2018

**SUBJECT:** Evergreen School District Revenue

Willdan Financial Services has estimated the annual tax revenues to fund various school districts in the City of San José that could be generated by the Evergreen Senior Homes Specific Plan (hereinafter the “Specific Plan” or “Proposed Project”).<sup>1</sup>

As shown in Table 1, the proposed project would generate approximately \$3.85 million in annual revenues for various educational districts in the community. The Evergreen Elementary School District alone could receive nearly \$2.0 million dollars per year in additional tax revenue, and the East Side Union High District would receive an additional \$1.12 million per year.

**Table 1 - Estimated Annual School District Revenues Generated by Proposed Project**

Market Rate Residential Units <sup>1</sup>	728	
Assumed assessed value per unit	\$1,000,000	
Total Assessed Value	\$728,000,000	
	<b>Share of 1% Property Tax <sup>2</sup></b>	
<b>Taxing Entity</b>	<b>Percentage</b>	<b>Nominal</b>
Evergreen Elementary	26.78394971%	\$1,949,872
East Side Union High	15.34672928%	\$1,117,242
San Jose-Evergreen Community College	7.35741194%	\$535,620
County School Service	3.47824824%	<u>\$253,216</u>
		\$3,855,949

<sup>1</sup> Affordable units (182) are assumed to be tax exempt.

<sup>2</sup> Shares for Tax Rate area TRA 017-028. Santa Clara County Controller.

<sup>1</sup> The Proposed Project is described in detail in the Executive Summary of the “Fiscal Impact Analysis for the Evergreen Senior Homes Specific Plan.”

These revenue estimates are conservative. As described in detail in the Fiscal Impact Analysis of the Proposed Project prepared by Willdan, the \$1.0 million assessed value per residential unit is based on current sales at The Villages, an existing senior community in the City of San Jose, which offer a relatively dated housing product. Also, these estimates do not account for the increase in assessed value due to the 2% annual increase permitted by Proposition 13, nor the appreciation resulting through standard market value appreciation.

Willdan has not estimated the potential costs to the school district associated with the Proposed Development. However, given that the Proposed Project will serve residents age 55 and over, it should not impose any costs on these school districts, with the exception, perhaps, of the San Jose-Evergreen Community College.





STATE CAPITOL  
P.O. BOX 942849  
SACRAMENTO, CA 94249-0027  
(916) 319-2027  
FAX (916) 319-2127

DISTRICT OFFICE  
100 PASEO DE SAN ANTONIO, SUITE 319  
SAN JOSE, CA 95113  
(408) 277-1220  
FAX (408) 277-1036

E-MAIL  
Assemblymember.Kalra@assembly.ca.gov

# Assembly California Legislature



**ASH KALRA**  
ASSEMBLYMEMBER, TWENTY-SEVENTH DISTRICT

COMMITTEES  
CHAIR: AGING AND LONG-TERM CARE  
EDUCATION  
JUDICIARY  
LABOR AND EMPLOYMENT  
WATER, PARKS, AND WILDLIFE

January 23, 2018

RE: Item 3.3 - Actions Related to the Petition Initiative Amending the Envision San Jose 2040 General Plan (Evergreen Senior Homes Initiatives).

Dear San Jose Mayor and City Council,

Over the years, I have been a vocal advocate for housing, particularly affordable housing, as San Jose, and much of the state, has entered into an era of housing scarcity and ballooning costs. As Chair of the California State Assembly Aging & Long-Term Care Committee, I have a particular interest in investing in housing for seniors and veterans who face more housing instability than ever before. However, I have faced these challenging issues with the thoughtfulness and deliberation required of issues that have long-term impacts based on decisions we make in the present. I have appreciated our Mayor and City Council for similarly taking the issues of housing accessibility seriously and the city staff for dedicating so much of their expertise in trying to get it right.

It is with this thoughtful approach in mind that I urge you to allow the initiative before you regarding the Evergreen development to go to the ballot, rather than approving the ordinance today, in order to allow an opportunity for city officials, environmental advocates, and Evergreen residents to understand the potential traffic, environmental, and economic impacts of this development proposal. Furthermore, I think it is important to understand this particular proposal's impact on the ability for future projects to curtail thoughtful planning. As a former City Councilmember and Planning Commissioner for the City of San Jose, I know all too well the degree to which city leaders, planners, and community leaders have dedicated their time and

**STATE CAPITOL**  
P.O. BOX 942849  
SACRAMENTO, CA 94249-0027  
(916) 319-2027  
FAX (916) 319-2127

**DISTRICT OFFICE**  
100 PASEO DE SAN ANTONIO, SUITE 319  
SAN JOSE, CA 95113  
(408) 277-1220  
FAX (408) 277-1036

**E-MAIL**  
Assemblymember.Kalra@assembly.ca.gov

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ASSEMBLYMEMBER, TWENTY-SEVENTH DISTRICT

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energy in establishing the General Plan to plan for the future, protect open space, and ensure we set San Jose on the right path for responsible development. This thorough process is done to allow our residents the opportunity to know what impacts any future developments may have in their own backyard to the best extent possible. Given the potential this initiative has in side-stepping the important work that has been done over the years, residents and voters deserve to understand all of the expected ramifications of this initiative before they make a decision in June.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "Ash Kalra".

Ash Kalra  
California State Assemblymember  
Assembly District 27