

INVEST HEALTH

Strategies for Healthier Cities

A Project of the *Robert Wood Johnson Foundation*
and *Reinvestment Fund*

Invest Health Field Building ADU Virtual Convening
Grand Rapids, MI, Missoula, MT, Napa, CA and Riverside, CA
October 5, 7, 9, 13 and 15, 2020

To register, click here: <https://forms.gle/9sYKLXpJbpboeEg6>





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DAY 1: Monday, October 5, 2020: 10:00 am – 12:00 pm PST ***Equity and Access for Health: Why it Matters & How it Relates to ADUs***

Join Zoom Meeting

<https://us02web.zoom.us/j/84331513577?pwd=L1BsRGhBMUJpVnpzSkIGd3hkUFhMUT09>

Meeting ID: 843 3151 3577

Passcode: 957678

10:00 – 10:10, Lark Ferrell, Housing Manager, City of Napa, Napa Invest Health team, *Welcome, Introduce Kol Peterson and Invest Health city teams: Grand Rapids, Missoula, Napa, and Riverside*

Invest Health teams present on what role they see ADUs playing in their housing policies and key takeaways that each hope to get from this ADU convening.

10:10 – 10:20 Renee Schomp, Director, Napa Sonoma ADU Center

10:20 – 10:30 Laval Means, Planning Services Manager, City of Missoula

10:30 – 10:40 Jeremy Moore, Director, Community Health Programs & Shared Services, Spectrum Health, Grand Rapids, MI

10:40 – 10:50 Christine Saunders, Director of Environmental Services, Sagecrest Planning, Riverside, CA

10:50 – 10:55 Break

10:55 – 11:30 Keynote presenter: Robert Liberty, Urban Policy Development – *How ADUs are helping to overcome the barriers to healthy, equitable and sustainable communities*

11:30 – 11:45 *Breakout group discussion:*

What are some of the attributes of ADUs that were mentioned this morning that resonate with you? What additional questions come up for you? What modifications, if any, should be considered to enable these objectives? Have others tried these approaches? Have they been successful? Why/why not?

- Affordability - Lisa
- Housing Security - Lark
- Social and Economic Adversity – Kol and Robert

11:45 – 11:55 Q and A with Robert Liberty, facilitated by Kol

11:55 – 12:00 Close and next steps - Kol



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DAY 2: Wednesday, October 7, 2020: 10:00 – 11:45 PST

Financing and Access to Capital for Low/Fixed Income Homeowners

Join Zoom Meeting

<https://us02web.zoom.us/j/84331513577?pwd=L1BsRGhBMUJJPVnpzSkIGd3hkUFhMUT09>

Meeting ID: 843 3151 3577

Passcode: 957678

10:00 – 10:15 Kol Peterson, Owner, Accessory Dwelling LLC- *Welcome and financing overview: costs, financing options, renovation loans*

Financing expert presentations:

10:15 – 10:35 Julee Felsman, Mortgage Loan Officer, Guarantee Rate, *renovation loan financing that can work in all 50 states.*

10:35 – 10:45 Sonja Singha, Mortgage Loan Officer, Housing Trust Silicon Valley, *ADU construction loan program going into effect this summer*

10:45- 10:55 Lark Ferrell, City of Napa, CA, *Junior Unit Initiative Program*

10:55 – 11:05 Taylor Cain, Director of the City of Boston's Housing Innovation Lab, *ADU loan program*

11:05 – 11:10 Break

11:10 – 11:30 *Breakout sessions for discussion:*

1. Municipal funding for ADUs– Lark and Taylor
2. Mission-driven funding for ADUs – Sonja
3. Renovation loan financing for ADUs - Julee

11:30 – 11:40 *Report out from each group:*

1. Municipal funding for ADUs – 3 min.
2. Mission driven funding for ADUs – 3 min.
3. Renovation loan financing for ADUs – 3 min.

11:40 – 11:45 Kol, close and share resources



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DAY 3: Friday, October 9, 2020: 10:00 – 12:00 PST

Communications: Dealing with NIMBYism and ADU Development

Join Zoom Meeting

<https://us02web.zoom.us/j/84331513577?pwd=L1BsRGhBMUJJPVnpzSkIGd3hkUFhMUT09> Meeting ID: 843
3151 3577

Passcode: 957678

10:00 – 10:05 Welcome and Moderator, Kol Peterson, Owner, ADU Accessory Dwelling Strategies LLC

City team examples of grassroots advocacy towards more housing in residential neighborhoods

10:05 – 10:10 Jeremy DeRoo, Executive Director, LINC UP, Grand Rapids, MI

10:10 – 10:15 Hallie Carde, Coordinator for Health Equity, Missoula City-County Health Department

10:15 – 10:20 Kathy Michalak, Executive Director, Habitat for Humanity Riverside

10:20 – 10:50 Keynote Speaker, Katherine Einstein, Neighborhood Defenders

Politics of housing development: local politics and policy, racial and ethnic politics, and American public policy

10:50 – 11:05 Q and A with Katherine Einstein, facilitated by Kol

11:05 – 11:10 Break

Voices from the Portland community. What is working? How is support for ADUs being built, particularly in places where single family housing has been the norm for decades?

11:10- 11:25 David Sweet, activist

11:25 – 11:40 Tony Jordan, activist

11:40 – 11:55 Q and A with David, Tony, and Katherine, facilitated by Kol

11:55 – 12:00 Kol, close and share resources



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DAY 4: Tuesday, October 13, 2020: 10:00 – 12:00 PST-

Enabling Environment: Policy & Regulations That Support ADU Development

Join Zoom Meeting

<https://us02web.zoom.us/j/84331513577?pwd=L1BsRGhBMUJJPVnpzSkIGd3hkUFhMUT09>

Meeting ID: 843 3151 3577

Passcode: 957678

10:00 – 10:05, Welcome, Lisa Beczkiewicz, Health Promotion Supervisor, Missoula City-County Health Department, Missoula Invest Health team

10:05 – 10:45, Keynote speaker, Kol Peterson, *How can we encourage ADU development? ADUs in Portland: History and Challenges; local legislative overview- what conditions enable ADUs to thrive? Regulatory and non-regulatory strategies to enable ADUs; other challenges and opportunities such as short-term rentals of ADUs and amnesty programs*

10:45 – 10:55 Q and A with Kol, facilitated by Lisa

10:55 – 11:00 Break

Invest Health team panel discussion: current ADU initiatives, what is working, and what are the barriers for building ADUs in our Invest Health cities.

11:00 – 11:20 Renee Schomp, Director, Napa Sonoma ADU Center

11:20 – 11:25 Laval Means, Planning Services Manager, Missoula Invest Health team, City of Missoula

11:25 – 11:30 David Develder, Community Land Trust Director, Dwelling Place, Grand Rapids, MI

11:30 – 11:35 Mary Kopaski-Brown, City Planner, City of Riverside

11:45 – 11:55 Q and A with Renee, Laval, David, Mary, facilitated by Lisa

11:55 – 12:00 Kol, close and next steps.



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DAY 5: Thursday, October 15, 2020: 10:00 – 11:30 PST

Join Zoom Meeting

<https://us02web.zoom.us/j/84331513577?pwd=L1BsRGhBMUJJPVnpzSkIGd3hkUFhMUT09>

Meeting ID: 843 3151 3577

Passcode: 957678

Showcasing ADUs Tour

10:00 – 10:30 Keynote Speaker, Kol Peterson, Considerations for building an ADU - *ADU types, site infrastructure overview, small space design best practices, and site designs*

10:30 – 10:35 Marian's ADU story from Napa Sonoma ADU Center,
<https://napasonomaadu.org/stories>

10:35 – 10:55 ADU Homeowner stories- Tamara Warren, Nicholas Papaefthimiou

10:55 – 11:25 Q & A and Audience Discussion

11:25 – 11:30 Kol, Close and resources



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Session extras - ADU Educational Offerings

These are four, ready-to-go, off-the-shelf virtual products. Additional online materials are being developed currently for realtors in CA by autumn 2020.

- **[Backdoor Revolution- The Definitive Guide to ADU Development](#)**

The ADU bible for homeowners and policy makers & professionals. 378 pages. Retail cost is \$15 for eBook and \$25 for print book. Bulk rate cost is \$10 for eBook and \$20 for print books.

- **[Building an ADU Web Course](#)**

4+ hour course, with many additional resources (70+ short videos, many from the field, inside finished ADUs, and ADUs being constructed). Thorough course for homeowners seeking to build an ADU. Retail cost is \$299/seat. *Volume discount pricing is available.*

- **[The ADU Hour](#)**

Interviews and audience Q+A with leading worldwide practitioners operating in the ADU space (tags: design, construction, finance, appraisal, lending, policy, advocacy, middle housing, research, rental management, Canada, Australia, US). Twelve 1-hour recorded sessions. Retail cost is \$39/seat. No volume pricing.

- **[Accessory Dwelling Unit Primer Course for Realtors](#)**

3-hour course for realtors. Presentation format.



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Presenter Biographies

Keynote Speakers and guest presenters:

Kol Peterson

Kol Peterson is an ADU expert based in Portland, Oregon, who has helped catalyze the exponential growth of ADUs in Portland over the last decade through ADU advocacy, education, consulting, policy work, and entrepreneurship. He is the author of *Backdoor Revolution-The Definitive Guide to ADU Development*. He is the owner of Caravan- The Tiny House Hotel, the first tiny house hotel in the world, and organizer of Portland's popular ADU Tour. He consults with homeowners about ADUs on their property and teaches ADU classes for homeowners and for real estate agents in Oregon, Washington, and California. He edits and manages AccessoryDwellings.org and BuildinganADU.com.

Kol developed and lived in a detached new construction ADU in 2011 and developed a basement/garage conversion ADU in 2018. He has a master's degree in environmental planning from Harvard's Graduate School of Design. Prior to his ADU work, Kol worked in the federal government for ten years in Washington, DC and Portland, Oregon.

Renée Schomp

Renée Schomp is a design thinker, coalition-builder, social impact leader, and lawyer. She currently leads the Napa Sonoma ADU Center, a fiscally sponsored project of Napa Valley Community Foundation focused on scaling the construction of accessory dwelling units. Renée catalyzes collaborative, creative problem-solving in partnership with nonprofit organizations, government agencies, foundations, the private sector, and community members to increase housing affordability.

Renée regularly speaks on panels and facilitates design workshops throughout the U.S., including at SXSW Conference; the American Bar Association/NLADA Equal Justice Conference; the LSC Technology Initiative Grants Conference; and the Equal Justice Works Leadership Development Training Conference, among others.

She has worked throughout the U.S. on social justice issues as well as abroad; traveling to Guantánamo Bay, Cuba to observe military commissions hearings and working in Mexico City to help reintegrate and unify deported migrant families.

Renée lives in an above-garage ADU in Sonoma County and is an attorney barred in the State of California.

Christine Saunders

Christine Saunders has worked as an urban and environmental planner since 2000. Saunders is responsible for overall environmental project management, organization of technical experts, and document writing. She focused most of her career in the public sector managing the land use development permit process, including compliance with CEQA and other applicable plans, policies, programs, regulations, and laws. She has extensive experience preparing and reviewing CEQA documents for development and capital improvement projects. Saunders' strength is in providing clear, concise, internally consistent, accurate, and legally defensible CEQA documents that translate technical jargon into a document that speaks to the non-professional in one voice. Saunders earned a Bachelor of Arts degree in Urban Studies with an emphasis in Public Administration from San Diego State University.

Robert Liberty

Robert Liberty's 39-year career has focused on how to turn the ambitious goals and policies in land use and transportation plans into reality. One focus has been reforming exclusionary residential zoning. (An article he wrote about Oregon's efforts to reform exclusionary zoning can be found at <https://lawdigitalcommons.bc.edu/ealr/vol30/iss3/8/>)

He has been a staff attorney and director of a nonprofit planning organization, a county land use hearings officer, an elected official, Senior Counsel to a Member of Congress and a private consultant and attorney. He has worked in places as varied as Waco Texas, Portland Oregon, Los Angeles, Guadalajara Mexico, and Kunming China.

In recent years he organized and assisted collaborative efforts among businesses, nonprofit organizations, and government agencies to promote the construction of ADUs in Washington DC, Seattle, Charlottesville and Portland, Oregon. That work included commissioning survey research of ADU owners and tenants in Portland.

In 2019 Robert, acting on what he had learned and believed, had a tuck-under garage and part of a basement in his house remodeled into an ADU, on a very modest budget.

Currently he is managing the update of AARP's Model ADU State Act and Local Ordinance, working with AARP staff and other ADU experts from across the nation.

Sonya Singha

Sonya Singha joined Housing Trust as a Mortgage Loan Officer, Construction & ADUs, in March 2020. She helps originate construction, pre-development, and bridge financing for homeowners to cover the cost of constructing an accessory dwelling unit on their property. She brings extensive knowledge of mortgage products and financing from her previous experience operating a mortgage brokerage company for the last 20 years, where her personal loan volume business was between \$10-15 annually. She is passionate about giving back to the community and enjoys volunteering in her spare time.

Julee Felsman

For 26 years, Julee has been helping clients find just the right loan and successfully navigate the mortgage process. With a focus on education, she has a knack for breaking down complex lending concepts into simple terms. Julee's career has spanned Portland's ADU revolution. Financing an ADU can take persistence and a willingness to think outside the box – a perfect match for Julee's love of creative problem-solving. Julee is a licensed Mortgage Loan Originator in 19 states, is an ADU Specialist, Renovation Loan Expert, and was voted Portland's Best Mortgage Broker of 2019 (Willamette Week). When Julee's not at her desk, she spends her time cooking the occasional batch of homebrew and traveling the Northwest with her partner.

Taylor Cain

As Director, Taylor leads citywide efforts to pioneer innovative housing models and systems and accelerate the pace of innovation in the housing sector that promotes inclusion and equity across Boston neighborhoods. Taylor, a Jamaica Plain resident, completed her Ph.D. in Sociology at Boston University, and also holds a bachelor's degree from Wesleyan University. In addition to her academic pursuits, Taylor has worked with local nonprofit organizations and institutions on evaluation and research projects that focus on a range of issues, including economic development, racial equity, and displacement. Taylor fell 'in curiosity' with Boston during her first few years of graduate school as she experienced the city and its neighborhoods through different forms of public transportation. Deeply intrigued by how people move through and experience place, Taylor brings a sociological imagination to addressing the challenges of ensuring that Boston is a city that grows inclusively.

Katherine Levine Einstein, Ph.D.

Katherine Levine Einstein, Ph.D. is an assistant professor of political science at Boston University, with research and teaching interests that broadly include local politics and policy, racial and ethnic politics, and American public policy. Her most recent book was *Neighborhood Defenders: Participatory Politics and America's Housing Crisis*, which explores the politics of housing development.

David Sweet

David is a full-time volunteer, focused on projects that make his neighborhood, city and region more equitable and sustainable.

David spent 25 years with the City of Portland Bureau of Buildings (now Development Services) working on neighborhood and housing issues, including the revitalization of inner North and Northeast Portland in the 1980s/1990s. The success of those efforts led to the displacement of low-income families and people of color. Now, through Portland: Neighbors Welcome and other efforts, he is working to prevent displacement and retain the economic and ethnic diversity of Portland neighborhoods. For the past five years he has worked for the passage of the Residential Infill Project, finally adopted in August 2020.

Tony Jordan

Tony Jordan is the founder of the Parking Reform Network, a 501(c)3 organization with a mission to educate the public about the impact of parking policy on housing, climate change, and traffic.

Tony became interested in parking reform in 2010 and has been effective in advocating for reduced parking minimums, performance-based management, and other policy reforms through Portlanders for Parking Reform, which he founded in 2012.

Tony has a B.A. in Politics from UC Santa Cruz and applies his career experience in union organizing and software development in the service of combating climate change and building more sustainable cities.

Kathy Michalak

Kathy has been the Executive Director for Habitat for Humanity Riverside since April of 2014. She was appointed E.D. after having served on the board of directors for the organization, then retiring from a 35-year career in the newspaper business and joining the organization as an employee in 2009. Michalak quickly earned her Contractor's license, became the organization's Construction Manager and is responsible for the creation and expansion of home preservation programs assisting low income elderly, disabled and veteran homeowners keep up their homes, allowing them to age in place safely. The organization now assists over 75 homeowners every year, preserving existing affordable housing in the service area which covers Western Riverside County including the cities of Riverside, Jurupa Valley, Moreno Valley, Corona and Norco. Michalak has served as a member of the Grants Committee of The Community Foundation of San Bernardino and Riverside County for over 10 years and she also currently serves on the Board of Directors for the Greater

Riverside Chambers of Commerce where she is Vice Chair for Membership and Marketing. She serves on the Board of Directors for Habitat California, the statewide organization for Habitat for Humanity affiliates and on the Steering Committee for Leadership Riverside.

Michalak has lived in the City of Riverside for 20 years.

David de Velder

David recently joined Dwelling Place of Grand Rapids to lead their new Regional Community Land Trust (CLT). Dwelling Place was founded in 1980 and has developed and managed several thousand units of high quality and sustainable affordable rental housing in West Michigan. As one of the largest community development organizations in Michigan, Dwelling Place is undertaking a CLT initiative to address a broader array of affordable housing needs and in areas where traditional rental housing may not be feasible across its 15-County footprint.

For the past 20 years, David has been involved in the planning, financing, development, and construction of affordable housing in West Michigan. His work has included LEED certified and historic homes for Inner City Christian Federation and Habitat for Humanity; design charrette planning for several neighborhood districts; owner's representation for supportive and cohousing communities; residential energy audits thru Better Buildings of Michigan; listing/sale of residential real estate; and environmental cleanup/redevelopment of tax foreclosed homes and buildings for the Kent County Land Bank Authority. Prior to his housing work, David spent 10 years as an environmental consultant performing environmental due diligence for real estate transactions. David is a licensed Realtor in the State of Michigan and has a B.S. in Environmental Studies and Earth Science.

Mary Kopaskie-Brown

Mary joined the City of Riverside Planning Division in July 2018. She has over 30 years of land use and environmental planning experience in both the public and private sector.

Mary oversees all aspects of the City's Planning Division which includes current planning, advanced planning, planning information and historic preservation. She is responsible for continuing the success of the award-winning One Stop Shop and Development Review Committee (DRC). Her team will undertake the multi-year General Plan update that is slated to begin in 2020.

Before joining the City, Mary worked as the Chief of the Advance Planning Division for San Diego County. At the County she oversaw long-range planning projects that included the County's Climate Action Plan, Sustainable Groundwater Management Plans, Multi-Species Conservation Program, Community Plan updates and regulation/code updates.

Invest Health city team member presenters:

Lark Ferrell

Napa Invest Health team member Lark Ferrell's over 33 years of experience in local government has been primarily focused on affordable housing policy and programs. She currently serves as the Housing Manager for the City of Napa and also manages the Housing Authority of the City of Napa, which provides affordable housing administration for each of the cities in Napa County. This has included developing and implementing numerous affordable housing initiatives including Napa's Junior Unit Initiative Program which provides funding and technical assistance to Napa homeowners interested in created junior and conversion ADUs and making either the ADU or the primary unit available as an affordable rental unit.

Laval Means

Missoula Invest Health team member, Laval oversees the long-range planning division, which includes working with the community and governing bodies to develop policy and regulations for the built environment that also enhance the character, quality, and wellbeing of Missoula. She most recently managed the community process behind the city's new growth policy (Our Missoula), which emphasizes holistic planning.

Lisa Beczkiewicz

Lisa has spent the last 20 years in a leadership capacity working to address prevention strategies and health disparities. She is the Health Promotion Supervisor at the Missoula City-County Health Department, directing the development, implementation and evaluation of population health programs in chronic disease and injury prevention. She is the team leader for Missoula Invest Health, a health equity initiative that connects community development and health. She holds a bachelor's degree in social work from Indiana University and a Certificate in Public Health. She is working to complete her master's degree in Public Health from the University of Montana. Her passion for public health comes from previous work experiences as supervisor of the Flagship Program, Missoula's largest after-school program; as executive director of Women in Action, a nonprofit organization working to provide affordable and accessible health and education services in a rural Montana community; and as coordinator of Let's Move! Missoula, a childhood obesity prevention collaboration based at the health department

Jeremy Moore

Jeremy's work spans over 20 years of leadership in health, philanthropy innovation, and political action. He serves as Director, Community Health Programs & Shared Services at Spectrum Health, a health system recognized by the prestigious American Hospital Association Foster G McGaw Prize for outstanding community health efforts. Jeremy is a Robert Wood Johnson Foundation supported Culture of Health Leader. He is the architect for the first Pay for Success project in Michigan and sits on the Michigan Statewide Community Advisory Forum for Fifth Third Bank. He co-founded Equity PAC, an equity-focused political action committee. He is also the recipient of the 2016 LINC UP Visionary Community Spirit Award and the 2018 Systems Thinking Award from the Grand Rapids Chamber of Commerce.

Jeremy DeRoo

Jeremy DeRoo is executive director of LINC Up, a community revitalization organization that utilizes community organizing and real estate development to expand opportunities and dismantle structural racism. Recognizing that community development work within the urban core American context is connected to racial equity, Jeremy has helped build a diverse team of employees and helped address issues of systemic racialization in Grand Rapids. During his tenure at LINC, Jeremy has helped secure over \$100 million in funding for community improvement efforts resulting in over 15000 households participating in community meetings, improving over 750 homes and training over 1000 resident leaders.

Hallie Cardé

Hallie serves as the Coordinator for Health Equity for the Missoula City-County Health Department. Through this role, she is also an organizer in Common Good Missoula. Hallie previously served as the Community Health Educator for All Nations Health Center. She comes to Montana from the Southeast where she was the Program Evaluation Coordinator for the Center for Research in Nutrition and Health Disparities in Columbia, SC. Hallie has a Master of Public Health from the University of South Carolina and a B.A. in International Studies from Appalachian State University, in the mountains of western North Carolina. Hallie is passionate about health equity and addressing the systems and structures that improve health for all. When she is not working, she can be found exploring outside with her dog (Cano) or at home with a good book.