

Edited by Adrian Putra

Student, BSCR

Vicente del Rio

PhD, Associate Professor

City and Regional Planning Department

Cal Poly San Luis Obispo

Infill Residential Development: A Spectrum of Approaches The Fall 2004 Dean's Invitational Symposium Series

In 2004, Dean Tom Jones initiated an important symposium series to discuss current issues related to environmental design. The first of the series was on infill residential development, an increasingly important approach towards making cities more sustainable and energy efficient integrated, more walkable and less automobile dependent.

During the Fall of 2004, the Dean's Invitation Symposium Series took place at Cal Poly in San Luis Obispo. This event was organized by the College of Architecture and Environmental Design (CAED) with the theme, "Infill Residential Development: A Spectrum of Approaches." This event presented a range of housing and community types that are attractive, livable, and foster community, while being economically feasible as well.

The four sessions of the symposium covered recent important experiences in California, and were presented by professionals who were directly involved in their implementation. Each session was covered by a student from the City and Regional Planning Department for this edition of Focus.

The symposium started with Erik Schapiro, the Housing Chief for the County of Santa Cruz, presentation on an approach in tackling the challenge of providing affordable housing in an area that is becoming increasingly more unaffordable to live in. In the case of Santa Cruz County, it was important to provide affordable housing for local farm workers who represent a sizable portion of the worker population who find it increasingly hard to live in the area.

Next, Fran Wagstaff, President and Executive Director of the Mid-Peninsula Housing Coalition, gave a first person account on the challenges of providing affordable housing in the increasingly expensive peninsular section of San Francisco Bay Area, and satisfaction received in accomplishing this difficult task. More than simply presenting a know-how in developing affordable housing, Fran Wagstaff makes the argument for why it is so critical and in the best interests of the community to promote these types of projects.

The River Oaks master planned mixed-use community in Paso Robles was presented by Dick Willhoit, the sole proprietor of Estrella Associates, the project developer. This

was a very good example of a private developer producing a high-quality project based on various research inputs and a good end design. The company worked with the target population group for this development (in this case they were retirees) to determine the types of homes and amenities that they would be interested in a planned community.

In the final session, Rob Elliot, senior vice president for urban planning and design of the Irvine Company, Jeff Larsen of MVE Architects, and landscape architect Bill Burton of Burton & Associates, presented their experience with the Irvine Center Village currently under development in Irvine, California. This is a major effort in designing an infill development that would bring housing into the center of Irvine, in what was a typical suburban area with shopping malls and surrounded by highways. The design response included many features such as the creation of four unique districts and underground parking as a method to maximize build-out densities and create a more walkable community.

BUILDING COMMUNITY, NOT JUST REAL ESTATE (REPORTED BY RYAN POTTER)

If anyone in the state of California knows how to make affordable housing work, it is Fran Wagstaff, president and executive director of Mid-Peninsula Housing Coalition, a non-profit developer located in Redwood City, California.¹ Wagstaff described to an eager audience the successes and struggles that come with providing affordable housing to a diverse metropolitan area. In her lecture, she not only explained strategies for developing such projects, but also why these developments are essential elements of an inclusive and healthy community.

1. The work of the Mid-Peninsula Housing Coalition may be seen at www.midpen-housing.org

The Mid-Peninsula Housing Coalition was started in 1970 to serve the San Francisco Bay Area residents who were not being served by the for-profit development community. The coalition not only develops housing projects, but also manages these properties and provides a growing list of services including technical assistance and academic and career advancement programs at some properties. The MPHIC provides housing not only for low-income families such as for farm workers, but also for senior-citizens, the disabled, and the homeless.

Wagstaff's explained that the MPHIC is a self-supporting organization that uses a variety of means to finance projects including federal, state, local, and private resources. Rather than only creating units for residents to live in, the coalition strives to create life-changing environments for their clientele. MPHIC's mission, stated Wagstaff, is "to provide safe, affordable shelter of high quality to those in need; to establish stability and opportunity in the lives of residents; and to foster communities that allow people from all ethnic, social and economic backgrounds to live in dignity, harmony and mutual respect".

Two particular projects, representative of the Mid-Peninsula Housing Coalition's work were discussed at great length. The first was Moonridge in Half Moon Bay. This development was created to house agricultural workers employed by local floriculture jobs and their families. Built in two phases, these 160 affordable units were developed despite political opposition and issues regarding the supply of necessary utilities. Fran Wagstaff showed us images of this project, notably showcasing a community center, gardens, and a computer center.

A second project, City Center Plaza in Redwood City was also discussed (Figure 1). This mixed-use project in an urban setting has a retail component along with 81 family housing units. Fran Wagstaff emphasized the design process of this development, including the avoidance of interior corridors and the MPHIC's insistence on outdoor entrances. Rather than creating a separate parking area, the parking for this project was tucked under the housing units and behind the retail space. Residential space was organized around courtyards and the units were designed to reject the building typologies normally reserved for low-income housing. Instead, the coalition (city, MPHIC, and retail partner) made sure this project was a place of residence that its inhabitants



Figure 1. The Mid-Pacific Housing Coalition's City Center Plaza in Redwood, CA (photo courtesy of Mid-Peninsula Housing Coalition)

could be proud of. From the pictures shown to the audience, it was clear that City Center Plaza is a development that not only fits in with its context, but also raises the bar for the treatment of affordable housing.

The hard work and dedication done by this organization to create inclusive communities has not gone unnoticed. MPHIC has won awards for almost all of its properties and continues to be recognized as a leader in its field. By forging public/private partnerships to create high-quality projects, and by staying committed to its mission, the Mid-Peninsula Housing Coalition is an example of how good planning practice can accommodate those left behind by the for-profit development community. These types of organizations fill a distinct niche in the community, ensuring that the needs of low-income families and other special-need populations are met.

Wagstaff's lecture focused on the details of developing and providing affordable housing. She described in great length financing schemes, resident screening processes, and good design. But the greatest insight that Wagstaff gave the audience was a look at her philosophy on the creation of community, as when she said how "beautiful buildings lift the spirits". She was alluding to the heart of why the development community must provide quality housing for low-income and special-needs families; the fact that these people, like everyone else, have a right to live in places where they feel healthy, fulfilled, and part of the community.

Fran Wagstaff also said that the coalition is "building community, not just real estate". This is what makes her and

the people of her organization good planners. They realize that the design and development of buildings is not only the creation of built objects, but of places that people experience every day. We can choose to simply create housing that will bring in the highest short-term revenues, or we can create quality places for people to live and interact, regardless of their life's circumstances. Fran Wagstaff and the Mid-Peninsula Housing Coalition have clearly chosen this second direction. They serve as a model for good planners working to meet the needs of California's low-income and special needs populations.

SEEKING AFFORDABLE HOUSING: A SANTA CRUZ COUNTY CASE STUDY (REPORTED BY SUSANNA DIAZ)

The pristine coast and the rugged mountains are typical of Santa Cruz County, as is the rich soil ideal for agricultural uses. A setting that makes it one of the most expensive areas in California and, consequently, one where the demand for affordable housing is rising. This convergence of high home prices and optimal agricultural soil brings forth an ongoing issue: Where can local farm workers live while tending to one of the most agriculturally rich producing areas of California? One development in particular reaches out to these farm workers. The San Andreas Community proves that affordable housing is a practical goal for Santa Cruz County.

The Santa Cruz County Redevelopment Agency is undertaking the effort of placing low income residents into housing units which coincides with housing codes and provides a relatively safe environment. Issues facing the Agency include workers sleeping in cars and the "doubling up" of families in a home, where as many as 22 people will reside in a single family house. This is an issue heard time and time again. Skilled laborers that fundamentally feed our livelihoods are struggling with mediocre wages and are essentially kept from successfully renting, let alone owning, a unit in the housing market of today. California, a place that some refer to as the "bread basket of the world," is dealing with a constant struggle of preserving agricultural land from being developed. Victims of this struggle include the farm workers who may migrate from farm to farm in order to make ends meet.

Pajaro Valley, located in the Southern part of Santa Cruz County, is an area where farmers have settled for some time.

The City of Watsonville, the residential and commercial hub of the Pajaro Valley, is an area full of crops including strawberries, apples, lettuce, cauliflower, broccoli, and artichokes. This area alone accounts for about 90 percent of Santa Cruz County's agricultural income, and has a need for farm worker housing. In an effort to provide workers with housing opportunities, the San Andreas Community project was developed.

Located in a rural part of Watsonville, San Andreas Community is representative of the strong need for affordable housing in Santa Cruz County. History of the site includes health and safety violations when the "bracero" – a Spanish term for manual farm worker – families started to be housed in illegal sub-standard housing. In 1999 the MPHIC, non-profit organization geared at developing attractive affordable housing, purchased the land with hopes of developing some much needed housing in the county. In 2000, MPHIC burned the existing structures, and with collaboration with the Santa Cruz County Redevelopment Agency and other funding sources such as Investor Capital Contributions Tax credits, the new facilities opened in July 2001 (Figure 2).

The project exemplifies the feasibility of widening housing opportunities to those who typically cannot afford. Built in a 1.19 acre site, the San Andreas project is a residential community which has 43 rental units of high quality affordable housing for very-low income families. Units average around 1,000 square feet and range from one to four bedrooms. In fact, this rental project is targeted at those who earn at least 50% of their income from working in agriculture. Special infrastructure include wastewater treatment for irrigation, and on-site amenities include a playground and a



Figure 2. The San Andreas Community housing project, in Santa Cruz (photos courtesy of Mid-Peninsula Housing Coalition)

community center providing for programs such as English as Second Language and job skill classes, meetings, and health programs such as Dientes and Salud para la Gente (Teeth and Health for People) (Figure 3). There is also a sheriff's substation on the premises.



Figure 3. The community center at San Andreas Community, Santa Cruz (photo courtesy of Mid-Peninsula Housing Coalition)

Table 1: Project Housing Component

Type	No. Unit	Size	Rent In Hundreds
1 Bedroom	2	~ 1000 ft	\$368
2 Bedrooms	4	~ 1000 ft	\$368-590
3 Bedrooms	24	~ 1000 ft	\$425-851
4 Bedrooms	12	~ 1000 ft	\$570- 950
Manager unit	1	~ 1000 ft	-
Total	43		

Table 2: Funding Costs

County RDA	\$ 1,400,000
AHP/ Federal HLB	\$ 250,000
HOME	\$ 605,000
CHFA Prop 1A	\$ 95,000
Investor Capital Contribution/ Tax Credit	\$ 5,850,000
Group Equity/ MPHC	\$ 52,000
Total	\$ 8,254,000

RIVER OAKS COMMUNITY IN PASO ROBLES (REPORTED BY KARLO FELIX)

The River Oaks Community was planned and developed by Estrella Associates, a local company based in Paso Robles, California. The company has been developing residential land in the area for twenty years striving to offer products what are well accepted by the community and that are affordable to their target markets. As a small volume developer, EA often teams with larger land developers such as Midland Pacific and Centex homes that they feel can best bring their products to consumers.

The River Oaks project was presented by Dick and Was Willhoit. Dick Willhoit has been the sole proprietor of EA for 20 years, and since starting the company his goal has been to create a team approach to the development and building industry. One of his the ways he has approached this has been through his association with the Home Builders Association of the Central Coast. Was Willhoit, Dick's son, has a background in real estate development business and is project manager, overseeing all site development.

River Oaks is a master-planned mixed-use community located in northern San Luis Obispo County. The 196-acre site was originally farmland and under the 1989 Borkey Area Specific Plan, 481 homes were allowed for a mixed-used masterplanned community. In developing River Oaks, a list of 11 goals were defined in order to mold a unique and cohesive community. They wanted to create a pedestrian friendly, well landscaped, and balanced multi-generational community, with a diversity of architectural styles. A place where home buyers would be eager to live which would also offer shopping, recreational, and educational opportunities within walking distance.

As a small developer, Dick Willhoit stresses the importance of doing research before developing a project. In order to determine which services and amenities consumers would be interested in purchasing, Estrella Associates employed four research groups to assist in defining the housing product and amenities to provided in River Oaks.

The Whitney Group was employed to define the feasibility of a mixed-used community at River Oaks. The Whitney Group's eventual work product was a River Oaks Master Plan, which defined the eventual product mix of the community.

The Master Plan developed a mix of products which met Estrella’s Goals and Mission Statement. With a growing population of retirees entering San Luis Obispo County, Whitney group also suggested the possibility of including an active adult lifestyle community as part of River Oak’s product mix.

Spurred by the idea of an active adult community, the ProMatura Group was hired to study the active adult market. ProMatura Group determined homes sizes and styles as well as the price range that would appeal to this market. Part of the research included desired neighborhood services, such as a restaurant, bank, and medical offices. Desired amenities included trails, a swimming pool, a golf course, and healthcare programs.

The Cal Poly Market Research Team came onto the projects with 150 units already built. The Cal Poly Team was hired to survey the extensive inquiry list which had formed. The Cal Poly team was able to develop a program, which defined the type of cuisine and hours of operation for the restaurant, and the amount of play area for the golf course. What was unique about the Cal Poly Market Research Team was the rate in which they received responses to their survey. An 8% response rate in 30 days is an industry standard, but the Cal Poly team was able to surpass the industry standard with a response rate of over 40% in 30 days.

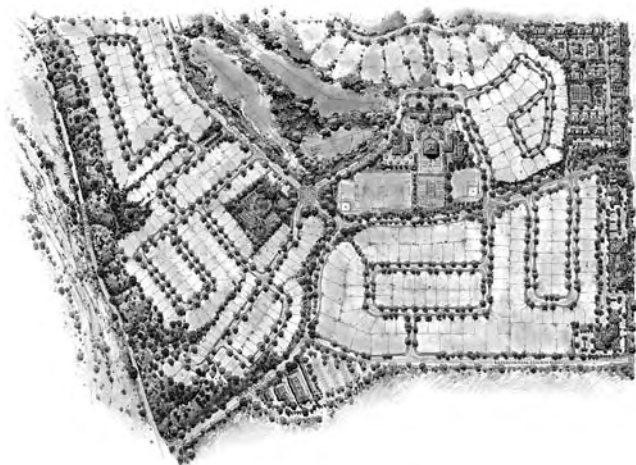


Figure 4. Illustrative master plan of the River Oaks Community in Paso Robles, CA (courtesy of IBA Design Group, Inc)

Meyers Group was employed to confirm the position and product mix of River Oaks. Their work product identified key market trends which would allow for further developments. In addition to matching a product mix with buyer profiles, the Meyers Group was able to identify a product mix which was amenable to local incomes. Based on this data Estrella Associates provided varying housing types aside from the age restricted active adult community. Additional markets identified included entry-level renters and first-time buyers.

From these four research groups came a body of knowledge which allowed for the development of a community which was truly in tune not only with its surroundings but with its neighboring residents as well. Using the information provided by the research firm River Oaks evolved into one community with seven distinct neighborhoods. Four concepts advanced River Oaks: residential, recreational, commercial, and education. All four areas were key components of River Oaks. Master design was provided by the IDB Design Group of Newport Beach, CA.

In developing the site plan, careful attention was paid to ensure that these separate components were well integrated into River Oaks. Residences are divided into seven neighborhoods ranging from 90 units of rental to larger semi-custom homes. The mix of housing opportunities allows for a variety of families with differing lifestyles and incomes to live at River Oaks. The “MarketPlace” provides River Oaks with basic



Figure 5. The Promenade, River Oaks Community in Paso Robles, CA (courtesy of IBA Design Group, Inc)

neighborhood services such as a cleaners, a restaurant, and groceries. The recreation component of this development is divided between passive and active open space. The eastern edge of the site remains as an oak forest with natural trails running along the length of the Salinas River. Although Estrella Associates did not originally intend to create a golf-course community, their research found that providing the amenity of a golf course was essential to the success of River Oaks. By planning with the Paso Robles Joint Unified School District, Estrella Associates was able to provide land for an elementary school within the development.

Despite being a small local developer, Estrella Associates has been able to broaden housing opportunities in San Luis Obispo County. Researching the market capabilities of the site showed that mixed-uses communities would be well received by the public. The mix of housing types provides attractive opportunities to homebuyers. Integrating retail, services, recreation, and education within a single master plan has allowed the residents of River Oaks to enjoy Estrella's vision of a multi-generational and diverse community.

INFILL OPPORTUNITIES FOR IRVINE: THE VILLAGE APPROACH (REPORTED BY GINO MACALUSO)

Where is Downtown Irvine? Probably no one who is familiar with the City of Irvine would have a definitive answer to this question. In this city with a population 140,000 and growing, there is a need for a unifying hub at the center of town. Moreover, when one thinks about Irvine they tend to picture a fast growing city with many different single-family residential neighborhoods. But what is missing the need for a sort of connection between different residential neighborhoods in order to form a community identity for Irvine. So what does the Irvine Company (one of the largest remaining private landowner groups in California) have planned for creating infill development opportunities in Irvine's Downtown in order to create this sense of community?

In the final symposium presentation Rob Elliot (Group Senior Vice President, The Irvine Company, Irvine), Jeff Larsen (MVE Architects, Costa Mesa), and Bill Burton (Burton Landscape Architecture Studio, San Diego) spoke on developing Irvine Center Village, an infill high-density mixed-use (predominantly residential) project.

The proposed village site is adjacent to The Irvine Spectrum, a regional shopping center comfortably located in an area bordered by Interstate Highways 5 and 405, and the 271 Toll Road (Figure 6). This shopping center has become more than your average commuter draw for bonus tax revenue to the city of Irvine. It has developed over recent years as the de-facto downtown for the city. The Irvine Company's plan for the Irvine Center Village consists of 1,550 units of high-density (48.99 dwelling units/acre) residential, 6,731 sq. ft. of retail, multiple recreational amenities, and a parking structure of 3,000 plus spaces. Expected to open in 2007, the Village will offer a wide range of housing opportunities with the intention of attracting a diverse group of households. The residential breakdown for the project is 43% and 57% of the residential units to be Luxury and Mid-market respectively. These units will range from 563 square feet to 1,440 square feet. Additionally, there will be 46 town homes, 1,504 Flats, and 1,550 elevator apartments.

The Village is divided into four unique districts, each with a different architectural theme and range of residential/mixed-use units (Figures. 7 & 8). The architectural design of District One (502 units) is influenced after the California Mission and Spanish Colonial Revival style architecture. District Two (350 units) is reminiscent of the courtyard style housing prevalent in Los Angeles during the 1920's and inspired by the Andalucia region of Spain. District Three (509 units) is influenced by Italian and Romantic architecture, specifically the Italian Renaissance Villa Sienna in regards to detailing and massing. The last district, District Four (349 units), is influenced by the Villas at Blair Island, with massing organized as a series of residential villas along the street and asymmetrical facades. The stakeholders and designers of this project have hopes of emulating these styles to provide a distinct sense of place within each district.

One of the several positive aspects of the project would be the placement of parking underground, rarely done in California due to Seismic-Hazard standards and engineering and design difficulties. This is important design aspect promoted a dense core district and a walkable neighborhood, a "new urbanist" qualities that the stakeholders hope to make a reality.

The Irvine Center Village is a classic example of bringing dense housing options to a city attempting to prevent sprawl, leapfrog development, and low-rise buildings. The intent to bring retail and recreation opportunities in addition to

housing is important for achieving a balance of uses and fostering community. External factors play a great deal in the relative success of this project. The location of the project is one such external factor that leaves much to be discussed. Although the project area is wedged between three major freeways, each adding access, they act as constrictions to the project area neighborhood. In a sense, the project would exist as an isolated island of development completely cut off from adjacent land uses by freeways, solidifying dependency on the automobile.

There are some negative sides to the Irvine Village project though. One is the surrounding context, which is in desperate need of help. Rob Elliot, in stating a major concern of the project said, that “there was a strong need to create a critical mass of 1,000 or more units to achieve what we’re after.” This project may be on the right track as to providing a denser Irvine, but if they ever aspire to make significant changes,

changes to the current surrounding zoning are needed. In answering questions from the audience the presenters said the Irvine Company’s long-term goal is to replace surface parking with a more close-knit grid and office buildings.

Another question raised is that as interesting as the architecture choices are at the Irvine Spectrum Village, they do not necessarily guarantee a recognizable community. Is the sense of place achieved in this village representative of the other communities in Irvine? Another issue that will certainly deserve more attention is affordable housing, planned to be implemented outside the project are on the other side of the freeway in a currently blighted, underdeveloped zone.



Figure 6. The Irvine Center Village, nestled between interstate highways and the Irvine Spectrum shopping center in Irvine, CA (courtesy Irvine Co.)

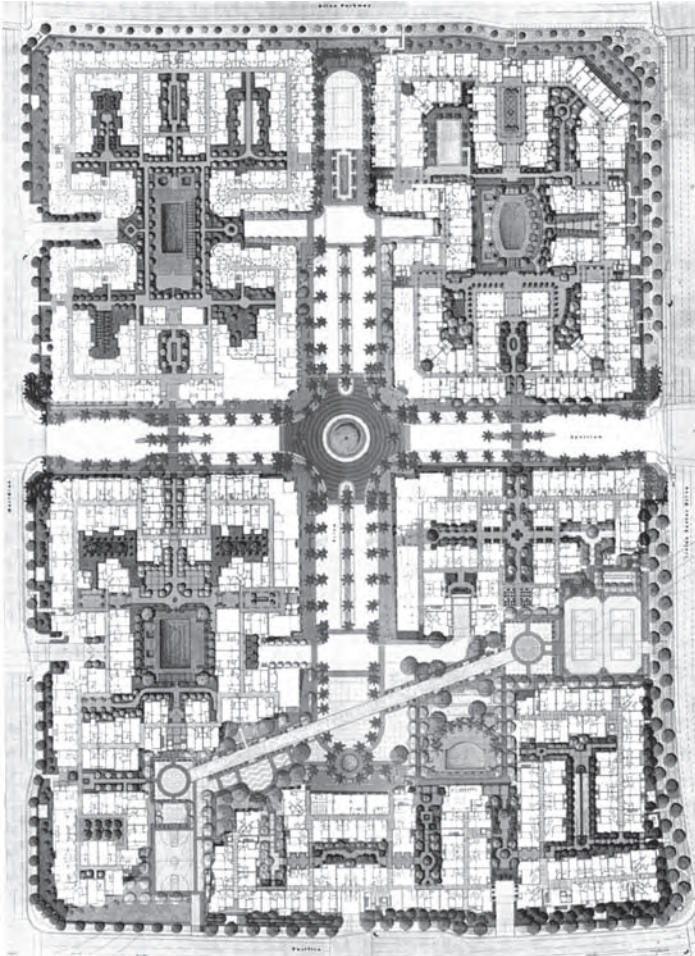


Figure 7. The Irvine Center Village site plan. Note the distinct four districts, the careful design and common amenities. (courtesy Irvine Co.)



Figure 8. Rendering of the main street at district three of the Irvine Center Village, with its architecture influenced by Italian and Romantic references (courtesy Irvine Co.)