APPENDIX C: PORTOLA VALLEY FAIR HOUSING ASSESSMENT

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1. REPORT CONTENT AND ORGANIZATION

This Fair Housing Assessment follows the April 2021 State of California State Guidance for AFFH. The study was conducted as part of the 21 Elements process, which facilitates the completion of Housing Elements for all San Mateo County jurisdictions.

Section 1. Introduction and Primary Findings

Section 2. Fair Housing Enforcement and Outreach Capacity reviews lawsuits/enforcement actions/complaints against the jurisdiction; compliance with state fair housing laws and regulations; and jurisdictional capacity to conduct fair housing outreach and education.

Section 3. Integration and Segregation identifies areas of concentrated segregation, degrees of segregation, and the groups that experience the highest levels of segregation, including racially or ethnically concentrated areas of poverty or affluence.

Section 4. Access to Opportunity examines differences in access to education, transportation, economic development, and healthy environments.

Section 5. Disproportionate Housing Needs identifies which groups have disproportionate housing needs including displacement risk.

Section 6. Contributing Factors identifies the primary factors contributing to fair housing challenges.

Section 7. Site Inventory Analysis analyzes the Sites Inventory to ensure sites for lower-income housing are located equitably with fair access to opportunities and resources.

Section 8. Policies and Programs provides the plan for taking meaningful actions to improve access to housing and economic opportunity.

2. INTRODUCTION AND PRIMARY FINDINGS

2.1 WHAT IS AFFH?

The State of California's 2018 Assembly Bill (AB 686) requires that all public agencies in the state affirmatively further fair housing (AFFH) beginning January 1, 2019. Public agencies receiving funding from the U.S. Department of Housing and Urban Development (HUD) are also required to demonstrate their commitment to AFFH. The federal obligation stems from the fair housing component of the federal Civil Rights Act mandating federal fund recipients to take "meaningful actions" to address segregation and related barriers to fair housing choice.

AB 686 requires all public agencies to "administer programs and activities relating to housing and community development in a manner that affirmatively furthers fair housing and take no action inconsistent with this obligation."[1]

AB 686 also makes changes to Housing Element Law to incorporate requirements to AFFH as part of the housing element and general plan to include an analysis of fair housing outreach and capacity, integration and segregation, access to opportunity, disparate housing needs, and current fair housing practices.

AFFIRMATIVELY FURTHERING FAIR HOUSING

"Affirmatively furthering fair housing" means taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, affirmatively furthering fair housing means taking meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws. The duty to affirmatively further fair housing extends to all of a public agency's activities and programs relating to housing and community development (Gov. Code, § 8800.50, subd. (e)(1)."

Source: California Department of Housing and Community Development Guidance, 2021, page 14.

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[1] California Department of Housing and Community Development Guidance, 2021, page 9.

2.2 HISTORY OF SEGREGATION IN THE REGION

The United States' oldest cities have a history of mandating segregated living patterns—and Northern California cities are no exception. ABAG, in its recent Fair Housing Equity Assessment, attributes segregation in the Bay Area to historically discriminatory practices—highlighting redlining and discriminatory mortgage approvals—as well as "structural inequities" in society, and "self-segregation" (i.e., preferences to live near similar people).

Researcher Richard Rothstein's 2017 book *The Color of Law: A Forgotten History of How Our Government Segregated America* chronicles how the public sector contributed to the segregation that exists today. Rothstein highlights several significant developments in the Bay Area region that played a large role in where the region's non-White residents settled.

This history of segregation in the region is important not only to understand how residential settlement patterns came about—but, more importantly, to explain differences in housing opportunity among residents today. In sum, not all residents had the ability to build housing wealth or achieve economic opportunity. This historically unequal playing field in part determines why residents have different housing needs today.

Pre-civil rights San Mateo County faced resistance to racial integration, yet it was reportedly less direct than in some Northern California communities, taking the form of "blockbusting" and "steering" or intervention by public officials. These local discriminatory practices were exacerbated by actions of the Federal Housing Administration which excluded low-income neighborhoods, where the majority of people of color lived, from its mortgage loan program.

According to the San Mateo County Historical Association. San Mateo County's early African Americans worked in a variety of industries, from logging, to agriculture, to restaurants and entertainment. Expansion of jobs, particularly related to shipbuilding during and after World War II attracted many new residents into the Peninsula, including the first sizable migration of African Americans. Enforcement of racial covenants after the war forced the migration of the county's African Americans into neighborhoods where they were allowed to occupy housing—housing segregated into less desirable areas, next to highways, and concentrated in public housing and urban renewal developments.

The private sector contributed to segregation through activities that discouraged (blockbusting) or prohibited (restrictive covenants) integrated neighborhoods. "White only" covenants were common in homeownership developments in San Mateo County, as were large lot and exclusive zoning practices. A prominent developer who deeds that specified that only "members of the Caucasian or White race shall be permitted" to occupy sold homes—the exception being "domestics in the employ[ment] on the premises"[2] went on to develop many race-restricted neighborhoods in the Bay Area, became president of the National Association of Home Builders (NAHB), became national president of the Urban Land Institute (ULI), and was inducted into California's Homebuilding Foundation Hall of Fame.

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[2] https://www.nytimes.com/2020/08/14/opinion/sunday/blm-residential-segregation.html

Residents of color were denied ownership in cases where prices had been raised through "blockbusting." The segregatory effect of blockbusting activities is well-documented in East Palo Alto. In 1954, after a White family in East Palo Alto sold their home to an African American family, the then-president of the California Real Estate Association set up an office in East Palo Alto to scare White families into selling their homes ("for fear of declining property values") to agents and speculators. These agents then sold these homes at over-inflated prices to African American buyers, some of whom had trouble making their payments. Within six years, East Palo Alto—initially established with "whites only" neighborhoods—became 82% African American. The FHA prevented re-integration by refusing to insure mortgages held by White buyers residing in East Palo Alto.

Throughout the county, neighborhood associations and city leaders attempted to thwart integration of communities. Although some neighborhood residents supported integration, most did not, and it was not unusual for neighborhood associations to require acceptance of all new buyers. Builders with intentions to develop for all types of buyers (regardless of race) found that their development sites were rezoned by planning councils, required very large minimum lot sizes, and\or were denied public infrastructure to support their developments or charged prohibitively high amounts for infrastructure.

The timeline of major federal Acts and court decisions related to fair housing choice and zoning and land use appears on the following page. As shown in the timeline, exclusive zoning practices were common in the early 1900s. Courts struck down only the most discriminatory and allowed those that would be considered today to have a "disparate impact" on classes protected by the Fair Housing Act. For example, the 1926 case *Village of Euclid v. Amber Realty Co. (272 U.S. 365)* supported the segregation of residential, business, and industrial uses, justifying separation by characterizing apartment buildings as "mere parasite(s)" with the potential to "utterly destroy" the character and desirability of neighborhoods. At that time, multi-family apartments were the only housing options for people of color, including immigrants.

The Federal Fair Housing Act was not enacted until nearly 60 years after the first racial zoning ordinances appeared in U.S. cities. This coincided with a shift away from federal control over low-income housing toward locally-tailored approaches (block grants) and market-oriented choice (Section 8 subsidies)—the latter of which is only effective when adequate affordable rental units are available.

2.2.1 History of Portola Valley

Portola Valley, California, sits in a peaceful valley astride the San Andreas Fault, one of the most dangerous earthquake faults in the world. Since incorporation in 1964, development has been slow and the town has kept a rural ambiance reminiscent of days gone by. The origins of the modern town of Portola Valley are in the logging Town of Searsville that stood along Sand Hill Road from the 1850s until 1891. It offered services for the men who came to cut the redwoods for the post gold rush building boom.

Legislative Related

Zoning Related

1949
Slum and blight clearance under urban renewal

1937
Public housing authorities are subsidized

1968
Fair Housing Act passed, preventing denial of housing, found to apply to local zoning laws

1974
Section 8 Voucher Program created

1988
Fair Housing Act is amended to include protections for people with disabilities, including reasonable accommodations

2015
Disparate impact cognizable under FHAA (*TDHCA v. ICP*)

1915
Racial segregation ordinances upheld by U.S. Supreme Court (*Hopkins v. City of Richmond*)

1910
Racial zoning ordinance (Baltimore created, State of Virginia enabled legislation)

1922
U.S. Department of Commerce establishes State Zoning Standards

1917
Racial zoning struck down by U.S. Supreme Court (*Buchanan v. Warley*)

1926
Local codes with residential districts upheld (*Euclid v. Ambler Realty*)

1948
Racially restrictive covenants in land and property transactions prohibited by U.S. Supreme Court (*Shelley v. Kraemer*)

1974
Exclusive definition of family upheld (*Belle Terre v. Boraas*)

1995
Limit on unrelated parties in group home struck down (*City of Edmonds v. Oxford House*)

2016
Disparate impact found in failure to rezone to allow small lots (*Avenue 6E v. City of Yuma*)

Major Public and Legal Actions that Influence Fair Access to Housing

At the dawn of the twentieth century, Andrew Hallidie (inventor of San Francisco's cable cars) lived on a large estate extending from Portola Road to the Skyline. He offered a portion of his Eagle Home Farm as a site for a school to replace the one at Searsville, and the small village of Portola developed around it near today's Episcopal church. The area became a place of small farms and large estates. Immigrants from Ireland, Portugal, Croatia, Italy, China, the Philippines, Chile, and Germany joined the Californios to raise strawberries, herd cattle and cut firewood. The large landowners came from San Francisco to escape the summer fog. A few were year-round residents.

Extensive residential development did not begin until after World War II, and by the early 1960s, many residents had become alarmed by increasing pressures for housing and business expansion. Therefore, in 1964, they voted to incorporate to have local control over development. The goals were to preserve the beauty of the land, to foster low-density housing, to keep government costs low by having a cadre of volunteers, and to limit services to those necessary for residents.

2.2.2 Past Affordable Housing Development Attempts

Currently, the only multi-family housing that serves lower income residents is at the Priory School. The Town does not have any multi-family zoning, and several attempts at developing affordable housing in the town have failed. This section describes four attempts to develop affordable housing in Portola Valley that ultimately were abandoned by Town Council due to various levels of community concerns.

Nathhorst Development

In 2003, an affordable housing development proposed of smaller condo units was approved by the Town Council, as well as a zoning change to permit 5.3 houses per acre. However, the Town held a referendum to defeat it. The Town had an earlier affordable housing plan that was rejected by voters. In 2003, the council rezoned 3.6 acres near the corner of Alpine and Portola roads for 15 to 20 small homes. Residents concerned about higher housing densities and their presumed effects on property values put a referendum on the ballot, and a narrow majority overturned the zoning decision.

Blue Oaks

To comply with the Town's inclusionary housing ordinance adopted in 1991, the Blue Oaks developer made several efforts to build eight moderate income housing units in Blue Oaks subdivision. In 1999, unsuccessful in their efforts to build the affordable housing, the developer conveyed the lots at Blue Oaks set aside for the moderate-income units to the Town. After extensive conversations with five affordable housing partners as well as consideration of alternative locations within the Blue Oaks subdivision, the Town determined that the development of eight moderate income housing units was not economically feasible on the Blue Oaks land. There was a negative reaction from the Blue Oaks residents about the implementation of the affordable units. For example, property owners said that potential future residents of the affordable units would not be allowed to use the Homeowners Association's (HOAs) pool. It was therefore determined that the Town should investigate alternative options that would result in the construction of affordable units.

In 2009, the Town adopted an update to the Housing Element of the Town's General Plan which included an option of selling the Town's land in Blue Oaks so that the Town could pursue affordable housing at another site. The Town's Blue Oaks lots (3 and 5 Buck Meadow Drive) were listed for sale in September 2012. The Town sold one to the Blue Oaks HOA (now permanent open space) and the other one was sold for market rate development. The sales generated $2,790,096 which was deposited to the Town's Inclusionary Housing Fund to go toward purchasing what would become the Windmill property. Eventually, the $100,000 deposit for the purchase of 900 Portola Road was returned to the Town following the expiration of the purchase and sale agreement for the site. There were some suggestions to locate the affordable units on property in Los Trancos, but that idea was not pursued.

Windmill School Property

In June 2012, the Town announced its intent to purchase 900 Portola Road as a potential site for construction of the Housing Element required moderate income housing units. The site was the former location of Al's Nursery, which had environmental contamination issues. To fund the purchase of 900 Portola Road for such housing, the Town would use proceeds from the sale of the Blue Oaks lots. A full Town Council meeting included opponents of the housing plan and advocates for Windmill School, a private preschool that had been considering the site for a permanent home. A notice from the County of San Mateo regarding progress on the hazardous material cleanup had raised concerns. In addition, Town residents were very concerned to lose the school, citing personal memories from their children attending the school. Others felt Windmill School's proposed relocation to 990 Portola Road would enable the school to offer more of the programs families desired. Opponents spoke during the oral communications period at the start of the meeting. Speakers for the school and against the housing were well represented. There were not comments in favor of the affordable housing project. Since the matter was not on the formal agenda, the Council could not comment. The site was not pursued for affordable housing and Windmill School eventually gained approval for the preschool to move to the site.

After the Town's sale of the lots at Blue Oaks and attempt to purchase 900 Portola Road for affordable housing, several residents became aware of and interested in addressing the challenge of affordable housing in the community. The Town Council, therefore, established the Affordable Housing Ad-Hoc Committee to focus on addressing some of the challenges associated with affordable housing in town.

2.2.3 PRIMARY FINDINGS

This section summarizes the primary findings from the Fair Housing Assessment for Portola Valley including the following sections: fair housing enforcement and outreach capacity, integration and segregation, access to opportunity, disparate housing needs, and contributing factors and the Town's fair housing action plan.

- **No fair housing complaints were filed** in Portola Valley from 2017 to 2021. Even so, the Town of Portola Valley **could improve the accessibility of fair housing information** on their website and resources for residents experiencing housing discrimination. The Town does include information

on fair housing but it is located under a "State Housing Element Requirement" heading page.[3] As part of this Update, a new program proposes elevating fair housing information to the "Housing in Portola Valley" page and identifying it as a resources for residents to understand and report housing discrimination.

- Compared to the county overall, **Portola Valley has limited racial and ethnic diversity:** Countywide, racial/ethnic minorities account for 61% of the overall population; however, they only account for 18% in Portola Valley.

- **Economic diversity is also limited:** 73% of households in Portola earn more than 100% AMI compared to 49% in the county overall. All census block groups in the town have median incomes above $125,000 and poverty is low throughout Portola Valley.

- Countywide, racial and ethnic minority populations are **disproportionately impacted by poverty, low household incomes, cost burden, overcrowding, and homelessness** compared to the non-Hispanic White population. Additionally, racial and ethnic minorities are more likely **to live in moderate resources areas and be denied for a home mortgage loan.**

- Similar disparities are *not* evident in the Town of Portola Valley, however, in part due to the limited racial/ethnic and economic diversity noted above. In the regional context, Portola Valley represents **a high opportunity area with relatively low accessibility to low- and moderate-income households**, which are more likely to be racial/ethnic minorities.

- Portola Valley is entirely contained within a single census tract—the standard geographic measure for "neighborhoods" in U.S. Census data products. As such, the town does not contain any racial/ethnic concentrations, poverty concentrations, nor concentrations of housing problems.

- The composite opportunity score for Portola Valley shows the town to be a "highest resource area" and the Social Vulnerability Index (SVI) provided by the Centers for Disease Control and Prevention (CDC) ranks the town as "low vulnerability to a disaster (based on four themes of socioeconomic status, household composition, race or ethnicity, and housing and transportation).

- Portola Valley has a **slight concentration of residents with a disability with 10% of the population compared to 8% in the county.** Even so, unemployment among residents living with a disability (3%) in Portola Valley is the same those without a disability (3%) and similar to the county overall.

- Disparities by race and ethnicity are prevalent for home mortgage applications, particularly in denial rates. **Hispanic (29% denial rate) and Asian households (19%) had the highest denial rates for mortgage loan** applications in 2018 and 2019. Conversely, non-Hispanic White (15%) and households of unknown race/ethnicity (11%) have the lowest denial rates during the same time.

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[3] https://www.portolavalley.net

3. FAIR HOUSING ENFORCEMENT AND OUTREACH CAPACITY

This section discusses fair housing legal cases and inquiries, fair housing protections and enforcement, and outreach capacity.

Fair housing legal cases and inquiries. California fair housing law extends beyond the protections in the Federal Fair Housing Act (FHA). In addition to the FHA protected classes—race, color, ancestry/national origin, religion, disability, sex, and familial status—**California law offers protections for age, sexual orientation, gender identity or expression, genetic information, marital status, military or veteran status, and source of income** (including federal housing assistance vouchers).

The California Department of Fair Employment in Housing (DFEH) was established in 1980 and is now the **largest civil rights agency in the United States.** According to their website, the DFEH's mission is, "to protect the people of California from unlawful discrimination in employment, housing and public accommodations (businesses) and from hate violence and human trafficking in accordance with the Fair Employment and Housing Act (FEHA), Unruh Civil Rights Act, Disabled Persons Act, and Ralph Civil Rights Act."[4]

DFEH receives, evaluates, and investigates fair housing complaints. DFEH plays a particularly significant role in investigating fair housing complaints against protected classes that are not included in federal legislation and therefore not investigated by HUD. DFEH's website provides detailed instructions for filing a complaint, the complaint process, appealing a decision, and other frequently asked questions.[5] Fair housing complaints can also be submitted to HUD for investigation.

Additionally, San Mateo County has a number of **local enforcement organizations** including Project Sentinel, the Legal Aid Society of San Mateo County, and Community Legal Services of East Palo Alto. These organizations receive funding from the County and participating jurisdictions to support fair housing enforcement and outreach and education in the County.

From 2017 to 2021, **57 fair housing complaints in San Mateo County were filed with the U.S. Department of Housing and Urban Development (HUD) though none were in the Town of Portola Valley.** Countywide, most complaints cited disability status as the bias (56%) followed by race (19%), and familial status (14%). No cause determination was found in 27 complaints followed by successful conciliation or settlement with 22 complaints. Fair housing inquiries in 2020 were primarily submitted to HCD from the City of San Mateo, Redwood City, Daly City, and Menlo Park.

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[4] https://www.dfeh.ca.gov/aboutdfeh/
[5] https://www.dfeh.ca.gov/complaintprocess/

Name	Service Area	Address	Phone	Website
Project Sentinel	Northern California	1490 El Camino Real, Santa Clara, CA 95050	(800) 339-6043	https://www.housing.org/
Legal Aid Society of San Mateo County	San Mateo County	330 Twin Dolphin Drive, Suite 123, Redwood City, CA 94065	(650) 558-0915	https://www.legalaidsmc.org/housing-resources
Community Legal Services of East Palo Alto	East Palo Alto, Menlo Park, Burlingame, Mountain View, Redwood City, and San Francisco	1861 Bay Road, East Palo Alto, CA 94303	(650)-326-6440	https://clsepa.org/services/#housing

FIGURE 1: FAIR HOUSING ASSISTANCE ORGANIZATIONS, SAN MATEO COUNTY

Source: Organization Websites

	2017	2018	2019	2020	2021	2017-2021 Total Cases	2017-2021 Total % of Total
Disability	8	9	3	9	3	32	56%
Race	3	5	2	1		11	19%
Familial Status	4	3			1	8	14%
National Origin	2				1	3	5%
Religion		1		1		2	4%
Sex					1	1	2%
Total cases	17	18	5	11	6	57	100%

FIGURE 2. FAIR HOUSING COMPLAINTS FILED WITH HUD BY BASIS, SAN MATEO COUNTY, 2017-2021

Source: HUD.

Fair Housing Complaints and Inquiries

Fair Housing Complaints, by Basis, San Mateo County, 2017-2021

	Number	Percent
Disability	32	56%
Race	11	19%
Familial Status	8	14%
National Origin	3	5%
Religion	2	4%
Sex	1	2%
Total cases	**57**	**100%**

HCD Fair Housing Inquiries (2013-2021) and HUD Fair Housing Complaints (2017-2021)

	HCD Fair Housing	HUD Fair Housing
San Mateo	26	9
Redwood City	24	6
Daly City	16	8
Menlo Park	9	5
Belmont	9	2
Pacifica	9	3
East Palo Alto	7	5
Foster City	7	0
Burlingame	6	5
South San Francisco	6	4
San Bruno	5	4
San Carlos	4	2
Woodside	2	0
Half Moon Bay	1	1

FIGURE 3: FAIR HOUSING ENFORCEMENT SUMMARY

Note: No fair housing inquiries were reported in Portola Valley.
Source: HUD, California Department of Housing and Community Development AFFH Data Viewer

Fair housing complaints filed with HUD by San Mateo County residents have been on a declining trend since 2018, when 18 complaints were filed. In 2019, complaints dropped to 5, increased to 11 in 2020, and had reached 6 by mid-2021.

Nationally, the National Fair Housing Alliance (NFHA) reported a "negligible" decrease in the number of complaints filed between 2019 and 2020. The primary bases for complaints nationally were nearly identical to San Mateo County's: disability (55%) and race (17%). Familial status represented 8% of complaints nationally, whereas this basis comprised 14% of cases in the county.

NFHA identifies three significant trends in 2020 that are relevant for San Mateo County:

- First, fair lending cases referred to the Department of Justice from federal banking regulators has been declining, indicating that state and local government entities may want to play a larger role in examining fair lending barriers to homeownership.

- Second, NFHA identified a significant increase in the number of complaints of harassment—1,071 complaints in 2020 compared to 761 in 2019.

- Finally, NFHA found that 73% of all fair housing complaints in 2020 were processed by private fair housing organizations, rather than state, local, and federal government agencies—reinforcing the need for local, active fair housing organizations and increased funding for such organizations.[6]

Outreach and capacity. The Town of Portola Valley could improve the accessibility of fair housing information on their website and resources for residents experiencing housing discrimination. The Town does include information on fair housing but it is located under a "State Housing Element Requirement" heading page.[7] One proposed policy as part of this Update is to elevate fair housing information to the "Housing in Portola Valley" page and identifying it as a resources for residents to understand and report housing discrimination.

3.1   COMPLIANCE WITH STATE LAW

Portola Valley is compliant with the follow state laws that promote fair and affordable housing. The Town has not been alleged or found in violation of the following: Housing Accountability Act (Gov. Code. Section 65589.5) requiring adoption of a Housing Element and compliance with RHNA allocations;

- No Net Loss Law (Gov. Code Section 65863) requiring that adequate sites be maintained to accommodate unmet RHNA allocations;

- Least Cost Zoning Law (Gov. Code. Section 65913.1);

- Excessive Subdivision Standards Law (Gov. Code. Section 65913.2);

- Limits on Growth Controls Law (Gov. Code. Section 65589.5).

Housing specific policies enacted locally. The Town of Portola Valley identified the following local policies that contribute to the regulatory environment for affordable housing development in the city.

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[6] https://nationalfairhousing.org/2021/07/29/annual-fair-housing-report-shows-increase-in-housing-harassment/
7 https://www.portolavalley.net

Local policies in place to encourage housing development.

- Density Bonus Ordinances
- Reduced Fees or Waivers
- In-Lieu Fees (Inclusionary Zoning)
- Home sharing programs
- ADU Ordinance

Local barriers to affordable housing development.

- Lack of zoning for a variety of housing types beyond single-family detached homes
- Lack of land zoned for multi-family development
- Height limits
- Extensive time period/requirements to develop properties
- No local ordinances or procedures to address reasonable accommodations for persons with disabilities
- No policies to mitigate displacement of low income households

Local policies in place to mitigate or prevent displacement of low-income households.

- **Inclusionary zoning**
- **Fair housing legal services**

Local policies that are NOT in place but have potential Council interest for further exploration.

- **Dedicating surplus land for affordable housing**
- **Establish multi-family zoning districts**
- **Promoting streamlined processing of ADUs**

According to the California Department of Housing and Community Development AFFH Data Viewer (HCD data viewer), Portola Valley does not have any public housing buildings (see Figure 4). Most of the public housing buildings in the surrounding region are in San Francisco and the East Bay. As illustrated in Figure 5, data are not available on the use of housing choice vouchers in Portola Valley.
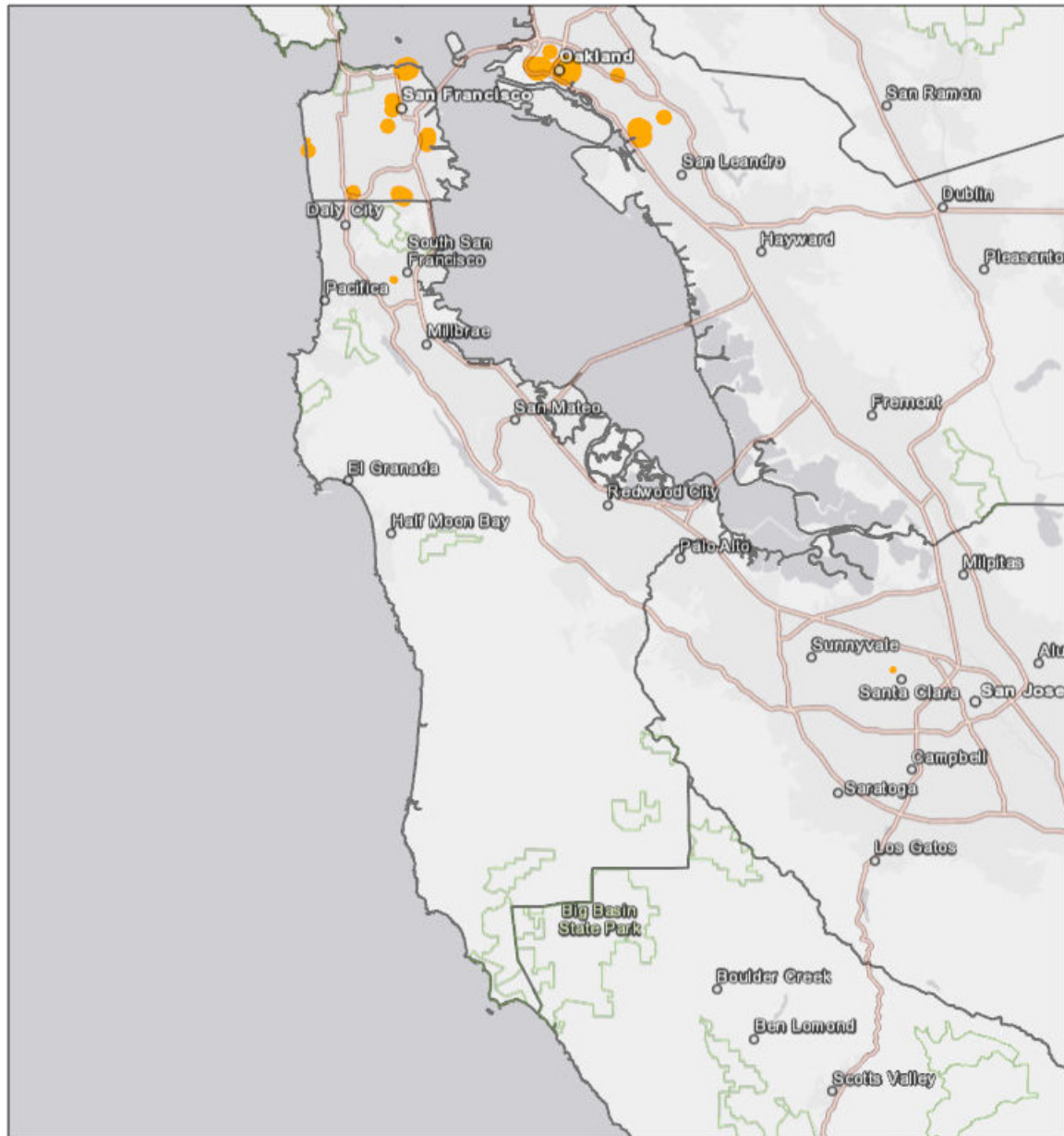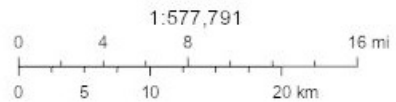
FIGURE 4: PUBLIC HOUSING BUILDINGS, SAN MATEO COUNTY

Source: California Department of Housing and Community Development AFFH Data Viewer

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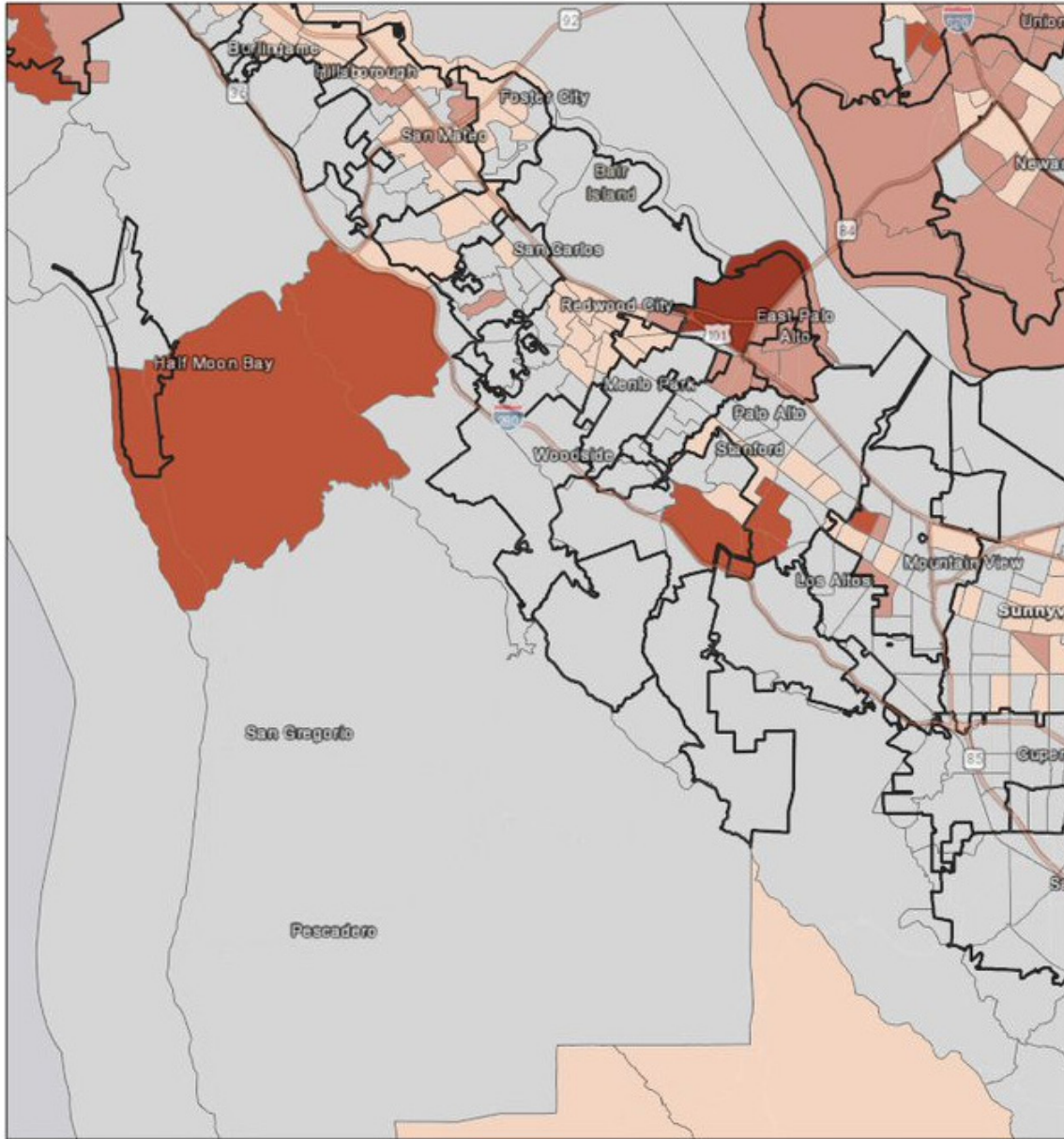
City/Town Boundaries

(R) Housing Choice Vouchers - Tract
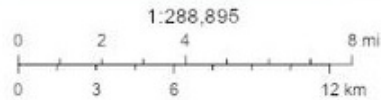
No Data

> 0 – 5%

> 5% – 15%

> 15% – 30%

> 30% – 60%

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0   3   6   12 km

County of San Mateo, California, Bureau of Land Management, Esri, HERE,
Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap
contributors, and the GIS user community

CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021,

FIGURE 5:   HOUSING CHOICE VOUCHERS BY CENSUS TRACT

Source: California Department of Housing and Community Development AFFH Data Viewer

4. INTEGRATION AND SEGREGATION

This section begins with background information and then analyzes racial segregation first at the neighborhood level within Portola Valley and then at a larger scale to compare regional trends in San Mateo County and Bay Area region to Portola Valley. It then examines income segregation at the neighborhood level and then regional level. The section closes out with the geographic distribution of persons with special housing needs, including persons with disabilities, familial status (large families,

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DEFINITION OF TERMS – GEOGRAPHIES

Neighborhood: In this report, "neighborhoods" are approximated by block groups.[1] Block groups are statistical geographic units defined by the U.S. Census Bureau for the purposes of disseminating data. In the Bay Area, block groups contain on average 1,500 residents.

Jurisdiction: Jurisdiction is used to refer to the 109 cities, towns, and unincorporated county areas that are members of ABAG. Though not all ABAG jurisdictions are cities, this report also uses the term "city" interchangeably with "jurisdiction" in some places.

Region: The region is the nine-county San Francisco Bay Area, which is comprised of Alameda County, Contra Costa County, Marin County, Napa County, San Francisco County, San Mateo County, Santa Clara County, Solano County, and Sonoma County.

Definition of Terms - Racial/Ethnic Groups

The U.S. Census Bureau classifies racial groups (e.g., white or Black/African American) separately from Hispanic/Latino ethnicity.[2] This report combines U.S. Census Bureau definitions for race and ethnicity into the following racial groups:

White: Non-Hispanic white

Latinx: Hispanic or Latino of any race[3]

Black: Non-Hispanic Black/African American

Asian/Pacific Islander: Non-Hispanic Asian or Non-Hispanic Pacific Islander

People of Color: All who are not non-Hispanic white (including people who identify as "some other race" or "two or more races")[4]

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[1] Census block groups are subdivisions of census tracts. Nearly all Bay Area jurisdictions contain at least two census tracts, with larger jurisdictions containing dozens of tracts. However, five Bay Area jurisdictions contain only one census tract: Brisbane, Calistoga, Portola Valley, Rio Vista, and Yountville. For the 104 jurisdictions with two or more census tracts, segregation measures are calculated by comparing the demographics of a jurisdiction's census tracts to the jurisdiction's demographics. Census tract data has greater reliability than block group data and is generally preferable to use for calculations. However, as census tract-based calculations cannot be made for the five jurisdictions with only one census tract, block group data is used for the segregation measures presented in this report. Accordingly, the segregation measures in this report are calculated by comparing the demographics of this jurisdiction's block groups to the demographics of the jurisdiction as a whole.

[2] More information about the Census Bureau's definitions of racial groups is available here: https://www.census.gov/topics/population/race/about.html.

[3] The term Hispanic has historically been used to describe people from numerous Central American, South American, and Caribbean countries. In recent years, the term Latino or Latinx has become preferred. This report generally uses Latinx to refer to this racial/ethnic group.

[4] Given the uncertainty in the data for population size estimates for racial and ethnic groups not included in the Latinx, Black, or Asian/Pacific Islander categories, this report only analyzes these racial groups in the aggregate People of Color category.

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female-headed no-spouse/no-partners households), and households using Housing Choice Vouchers (HCVs).

The majority of the information in this section is provided by the Association of Bay Area Governments (ABAG) in collaboration with UC Merced. Therefore, parenthetical references are used in the same manner as they were quoted in the report they were pulled from, as opposed to footnotes.

4.1 DEFINING SEGREGATION

Segregation is the separation of different demographic groups into different geographic locations or communities, meaning that groups are unevenly distributed across geographic space.

INTEGRATION AND SEGREGATION

"**Integration** generally means a condition in which there is not a high concentration of persons of a particular race, color, religion, sex, familial status, national origin, or having a disability or a particular type of disability when compared to a broader geographic area.

Segregation generally means a condition in which there is a high concentration of persons of a particular race, color, religion, sex, familial status, national origin, or having a disability or a type of disability in a particular geographic area when compared to a broader geographic area."

Source: California Department of Housing and Community Development Guidance, 2021, page 31.

This report examines two spatial forms of segregation: neighborhood level segregation *within* a local jurisdiction and city level segregation *between* jurisdictions in the Bay Area.

SEGREGATION FORMS

Neighborhood level segregation (*within* a jurisdiction, or *intra-city*): Segregation of race and income groups can occur from neighborhood to neighborhood *within* a city. For example, if a local jurisdiction has a population that is 20% Latinx, but some neighborhoods are 80% Latinx while others have nearly no Latinx residents, that jurisdiction would have segregated neighborhoods.

City level segregation (*between* jurisdictions in a region, or *inter-city*): Race and income divides also occur *between* jurisdictions in a region. A region could be very diverse with equal numbers of white, Asian, Black, and Latinx residents, but the region could also be highly segregated with each city comprised solely of one racial group.

Source: California Department of Housing and Community Development Guidance, 2021, page 31.

There are many factors that have contributed to the generation and maintenance of segregation. Historically, racial segregation stemmed from explicit discrimination against people of color, such as restrictive covenants, redlining, and discrimination in mortgage lending. This history includes many overtly discriminatory policies made by federal, state, and local governments (Rothstein 2017). Segregation patterns are also affected by policies that appear race-neutral, such as land use decisions and the regulation of housing development.

Segregation has resulted in vastly unequal access to public goods such as quality schools, neighborhood services and amenities, parks and playgrounds, clean air and water, and public safety (Trounstine 2015). This generational lack of access for many communities, particularly people of color

and lower income residents, has often resulted in poor life outcomes, including lower educational attainment, higher morbidity rates, and higher mortality rates (Chetty and Hendren 2018, Ananat 2011, Burch 2014, Cutler and Glaeser 1997, Sampson 2012, Sharkey 2013).

4.2 SEGREGATION PATTERNS IN THE BAY AREA

Across the San Francisco Bay Area, white residents and above moderate-income residents are significantly more segregated from other racial and income groups (see Appendix 2). The highest levels of racial segregation occur between the Black and white populations. The analysis completed for this report indicates that the amount of racial segregation both *within* Bay Area cities and *across* jurisdictions in the region has decreased since the year 2000. This finding is consistent with recent research from the Othering and Belonging Institute at UC Berkeley, which concluded that "[a]lthough 7 of the 9 Bay Area counties were more segregated in 2020 than they were in either 1980 or 1990, racial residential segregation in the region appears to have peaked around the year 2000 and has generally declined since."[8] However, compared to cities in other parts of California, Bay Area jurisdictions have more neighborhood level segregation between residents from different racial groups. Additionally, there is also more racial segregation *between* Bay Area cities compared to other regions in the state.

4.3 SEGREGATION AND LAND USE

It is difficult to address segregation patterns without an analysis of both historical and existing land use policies that impact segregation patterns. Land use regulations influence what kind of housing is built in a city or neighborhood (Lens and Monkkonen 2016, Pendall 2000). These land use regulations in turn impact demographics: they can be used to affect the number of houses in a community, the number of people who live in the community, the wealth of the people who live in the community, and where within the community they reside (Trounstine 2018). Given disparities in wealth by race and ethnicity, the ability to afford housing in different neighborhoods, as influenced by land use regulations, is highly differentiated across racial and ethnic groups (Bayer, McMillan, and Reuben 2004).[9] ABAG/MTC plans to issue a separate report detailing the existing land use policies that influence segregation patterns in the Bay Area.

4.3.1 RACIAL SEGREGATION IN PORTOLA VALLEY

Compared to the county overall, **Portola Valley has limited racial and ethnic diversity:** Countywide, racial/ethnic minorities account for 61% of the overall population; however, they only account for 18% in Portola Valley. Eighty-two percent of the population identifies as non-Hispanic White, 7% identifies as Hispanic, another 7% identifies as Asian, and 4% identifies as other or multiple races.[10] **Older**

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[8] For more information, see https://belonging.berkeley.edu/most-segregated-cities-bay-area-2020.

[9] Using a household-weighted median of Bay Area county median household incomes, regional values were $61,050 for Black residents, $122,174 for Asian/Pacific Islander residents, $121,794 for white residents, and $76,306 for Latinx residents. For the source data, see U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B19013B, Table B19013D, B19013H, and B19013I.

[10] The share of the population that identifies as African American or American Indian or Alaska Native is less than 1%.

residents are even less diverse with 93% of the population older than 65 years identifying as White compared to 80% of the population for children less than 18 years old.

Bay Area: American Indian or Alaska Native, NH 0%; Asian / API, NH 27%; Black or African American, NH 6%; White, Non-Hispanic (NH) 39%; Other Race or Multiple Races, NH 5%; Hispanic or Latinx 24%

San Mateo County: 0%; 30%; 2%; 39%; 4%; 24%

Portola Valley: 0%; 7%; 0%; 82%; 4%; 7%

Legend:
- American Indian or Alaska Native, NH
- Asian / API, NH
- Black or African American, NH
- White, Non-Hispanic (NH)
- Other Race or Multiple Races, NH
- Hispanic or Latinx

FIGURE 6: POPULATION BY RACE AND ETHNICITY, 2019

Source: ABAG Housing Needs Data Workbook

2000: 4%; 0%; 92%; 3%

2010: 6%; 0%; 88%; 2%; 4%

2019: 7%; 0%; 82%; 4%; 7%

Legend:
- American Indian or Alaska Native, NH
- Asian / API, NH
- Black or African American, NH
- White, Non-Hispanic (NH)
- Other Race or Multiple Races, NH
- Hispanic or Latinx
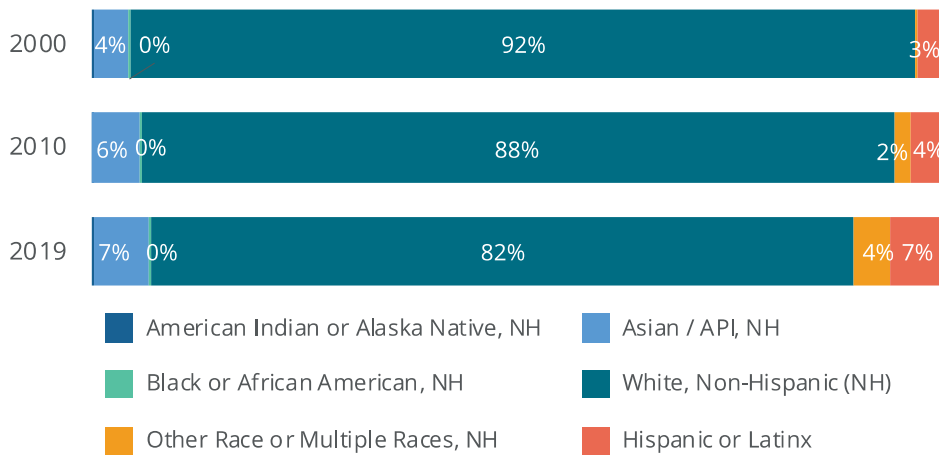
FIGURE 7: POPULATION BY RACE AND ETHNICITY, PORTOLA VALLEY, 2000-2019

Source: ABAG Housing Needs Data Workbook

Age 0-17: 5% | 16% | 80%
Age 18-64: 9% | 4% | 87%
Age 65+: 6% | 1% | 93%

Legend:
- American Indian or Alaska Native
- Asian / API
- Black or African American
- Other Race or Multiple Races
- White
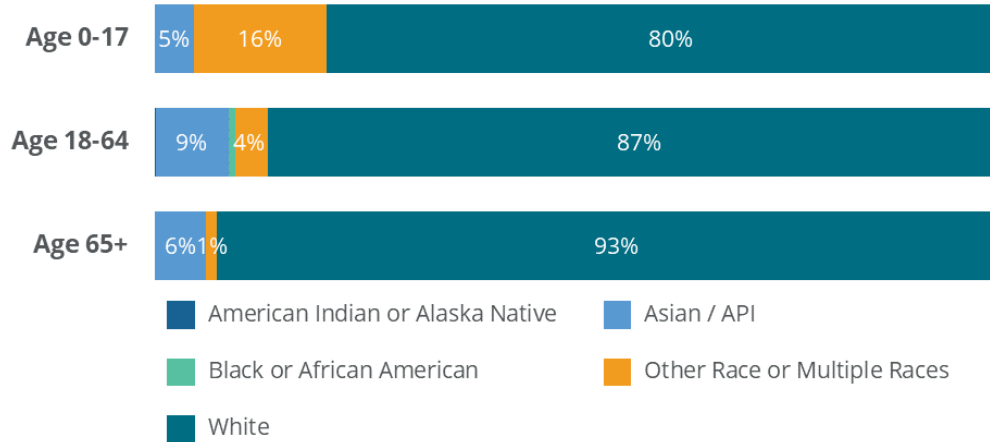
FIGURE 8:   SENIOR AND YOUTH POPULATION BY RACE, PORTOLA VALLEY, 2000-2019

Source: ABAG Housing Needs Data Workbook

Asian / API, NH: 100%
Black or African American, NH: 100%
White, Non-Hispanic (NH): 8% | 8% | 9% | 4% | 72%
Other Race or Multiple Races, NH: 57% | 43%
Hispanic or Latinx: 100%

Legend:
- 0%-30% of AMI
- 31%-50% of AMI
- 51%-80% of AMI
- 81%-100% of AMI
- Greater than 100% of AMI
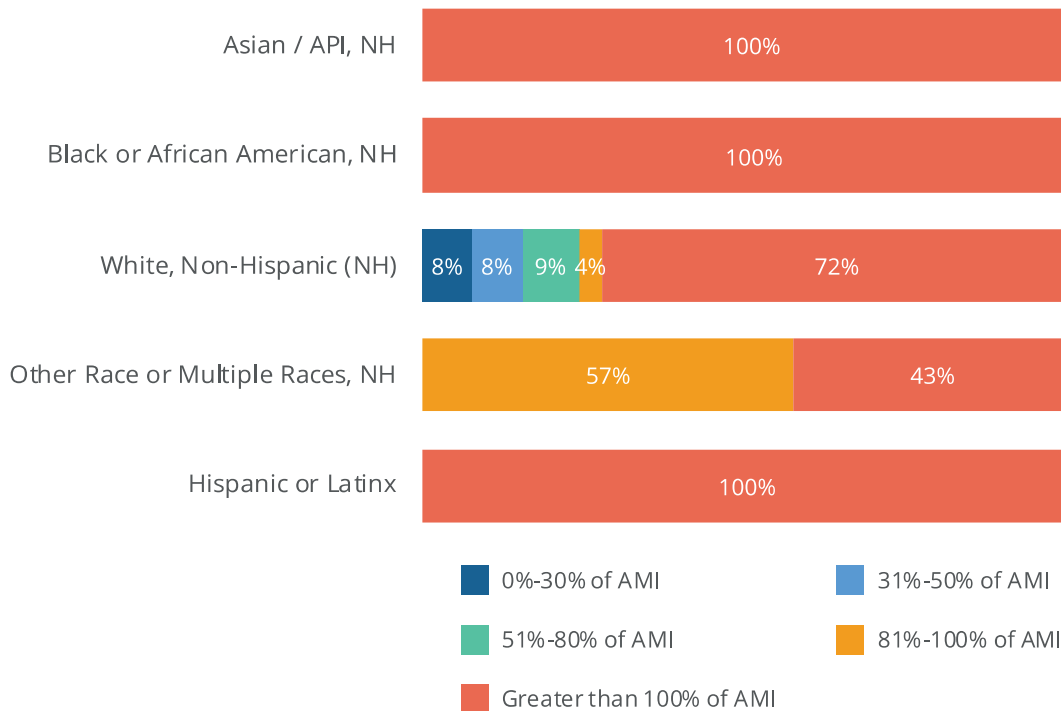
FIGURE 9:   AREA MEDIAN INCOME BY RACE AND ETHNICITY, PORTOLA VALLEY, 2019

Note: Data not available for American Indian or Alaska Native.
Source: ABAG Housing Needs Data Workbook

Poverty rates for all racial and ethnic groups are under 3% in Portola Valley.
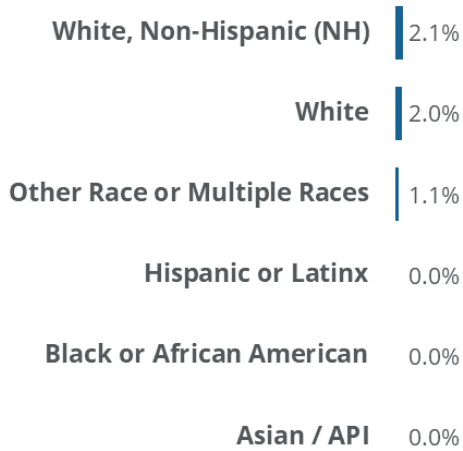
White, Non-Hispanic (NH)	2.1%
White	2.0%
Other Race or Multiple Races	1.1%
Hispanic or Latinx	0.0%
Black or African American	0.0%
Asian / API	0.0%

FIGURE 10: POVERTY RATE BY RACE AND ETHNICITY, PORTOLA VALLEY, 2019

Note: Sample size for American Indian or Alaska Native populations are too small to report poverty data.
*Source: ABAG Housing Needs Data Workbook*

Neighborhood Level Racial Segregation (*within* Town of Portola Valley)

Racial dot maps are useful for visualizing how multiple racial groups are distributed within a specific geography. The racial dot map of Portola Valley in Figure 11 below offers a visual representation of the spatial distribution of racial groups within the jurisdiction.[11] Generally, when the distribution of dots does not suggest patterns or clustering, segregation measures tend to be lower. Conversely, when clusters of certain groups are apparent on a racial dot map, segregation measures may be higher. The vast majority of dots are blue because Portola Valley is less diverse than the Bay Area as a whole with a population that is 82% White, 6.7% Hispanic or Latinx, 6.5% Asian, and 0.4% Black or African American. While there are very few dots signifying groups of Asian, Latinx, or Other racial groups (and none that signify a group of at least 18 Black residents in any given area), the few that do appear are not concentrated in any one portion of the Town.

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[11] Throughout this report, neighborhood level segregation measures are calculated using census block group data. However, the racial dot maps in Figure 1 and Figure 5 use data from census blocks. These maps use data derived from a smaller geographic scale to better show spatial differences in where different racial groups live. Census blocks are subdivisions of block groups, and in the Bay Area census blocks contain on average 95 people.
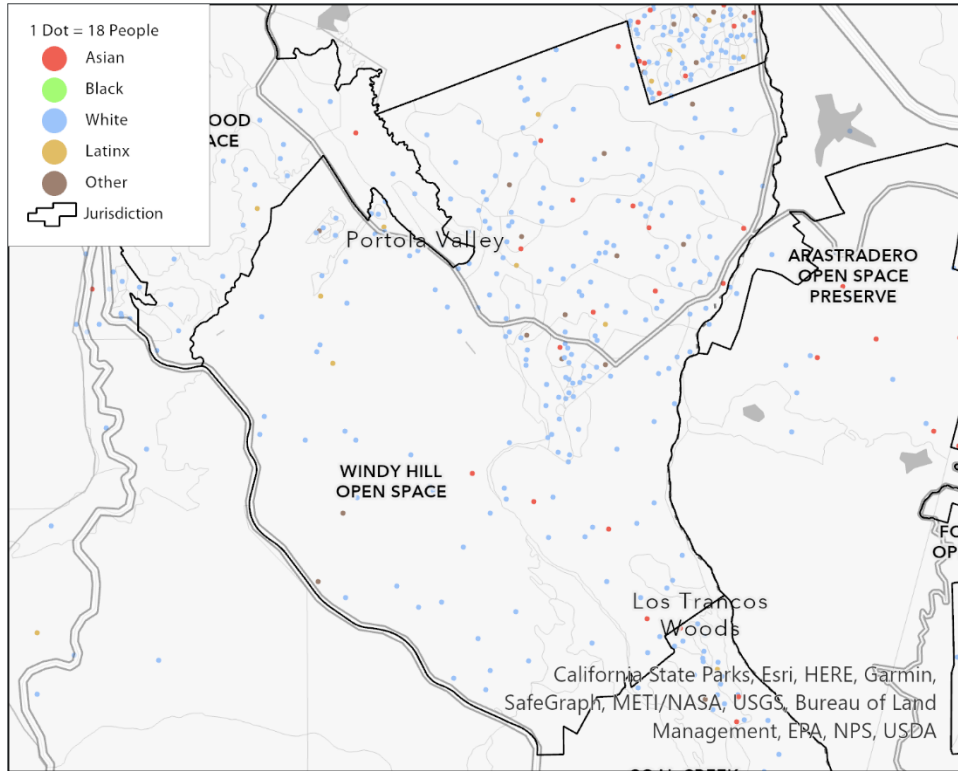
FIGURE 11: RACIAL DOT MAP OF PORTOLA VALLEY (2020)

Universe: Population. Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: The plot shows the racial distribution at the census block level for Town of Portola Valley and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.

There are many ways to quantitatively measure segregation. Each measure captures a different aspect of the ways in which groups are divided within a community. One way to measure segregation is by using an **isolation index**:

▪ The isolation index compares each neighborhood's composition to the jurisdiction's demographics as a whole.

▪ This index ranges from 0 to 1. Higher values indicate that a particular group is more isolated from other groups.

▪ Isolation indices indicate the potential for contact between different groups. The index can be interpreted as the experience of the average member of that group. For example, if the isolation index is .65 for Latinx residents in a city, then the average Latinx resident in that city lives in a neighborhood that is 65% Latinx.

Within Town of Portola Valley the most isolated racial group is white residents. Portola Valley's isolation index of 0.796 for white residents means that the average white resident lives in a neighborhood that is 79.6% white. Other racial groups are less isolated, meaning they may be more likely to encounter other racial groups in their neighborhoods. The isolation index values for all racial groups in Portola Valley for the years 2000, 2010, and 2020 can be found in Table 1 below. Among all

racial groups in this jurisdiction, the white population's isolation index has changed the most over time, becoming less segregated from other racial groups between 2000 and 2020.

The "Bay Area Average" column in this table provides the average isolation index value across Bay Area jurisdictions for different racial groups in 2020.[12] The data in this column can be used as a comparison to provide context for the levels of segregation experienced by racial groups in this jurisdiction. For example, Table 1 indicates the average isolation index value for white residents across all Bay Area jurisdictions is 0.504, meaning that in the average Bay Area jurisdiction a white resident lives in a neighborhood that is 50.4% white. **This is significantly lower than the isolation index for white residents within Portola Valley, which is 0.796, meaning the average white resident in the town lives in a neighborhood that is 79.6% white.**

TABLE 1: RACIAL ISOLATION INDEX VALUES FOR SEGREGATION WITHIN PORTOLA VALLEY

| Race	Portola Valley			Bay Area Average
	2000	2010	2020	2020
Asian/Pacific Islander	0.042	0.058	0.080	0.248
Black/African American	0.005	0.005	0.003	0.057
Latinx	0.037	0.044	0.052	0.262
White	0.910	0.877	0.796	0.504

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Similar to Figure 11, Figure 12 below evaluates the racial isolation indices of Bay Area jurisdictions, including Portola Valley, and how these indices are distributed compared to the overall Bay Area average. In this figure, each dot represents a Bay Area jurisdiction with the town of Portola Valley's indices indicated in a solid black line, and a red, dashed line representing the overall Bay Area average for each racial group. Based on the figure it is evident, just as it was in Figure 1, that the town's isolation index for white residents is significantly higher than the Bay Area average and many other Bay Area jurisdictions represented by dots. Conversely, the town's racial isolation indices for non-white racial groups are significantly lower than the Bay Area average of these groups, and that of other jurisdictions, as was also evident in Figure 12.

To better evaluate isolation indices for the town of Portola Valley compared to the overall Bay Area, demographic data of the town and the overall Bay Area, can be utilized to achieve a better understanding of segregation trends. For instance, while Portola Valley may have a significantly higher

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[12] In the reports produced for the 104 jurisdictions with two or more census tracts, this average and all comparisons of segregation measures only include data from these 104 jurisdictions, as measures calculated with census tract data are not comparable to the measures calculated with block group data used in the reports for the five jurisdictions with only one census tract (Brisbane, Calistoga, Portola Valley, Rio Vista, and Yountville). However, for the reports produced for the five jurisdictions with only one census tract, segregation measures for all 109 jurisdictions were recalculated using block group data to produce Bay Area averages and make comparisons across the region. Therefore, the Bay Area averages presented in these five reports are different from those provided in the other 104 reports.

isolation index among white residents than the Bay Area average, and lower values among non-white racial groups this is likely attributed to the town's overrepresentation of white residents compared to that of the Bay Area as a whole. Whereas the Bay Area's 2020 population was 35.84% white, 82.3% of Portola Valley's 2019 population was white. Similarly, while the town's isolation indices for non-white racial groups are well below regional averages, this is likely due to the underrepresentation of these racial groups within the town, rather than intra-city level segregation trends. Whereas 27.69% of the Bay Area's 2020 population was Asian/API, just 6.5% of Portola Valley's 2019 population was. Whereas 24.36% of the Bay Area's 2020 population was Latinx, just 6.7% of the Town's 2019 population was. Therefore, the isolation indices compared within both Figures 1 and 2, when supplemented with demographic data, help illustrate inter-city segregation trends across jurisdictional boundaries in the Bay Area. These trends are evident in the overrepresentation of white residents within the town compared to the overall Bay Area, as well as the underrepresentation of non-white racial groups compared to the overall region.
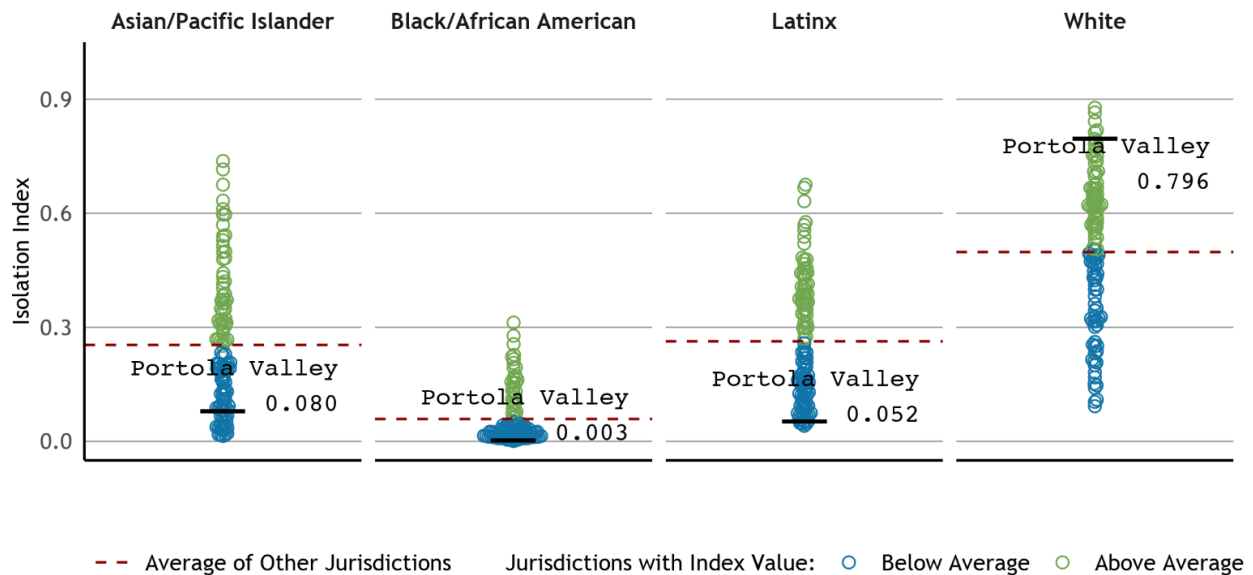
FIGURE 12: RACIAL ISOLATION INDEX VALUES FOR PORTOLA VALLEY COMPARED TO OTHER BAY AREA JURISDICTIONS (2020)

Universe: Bay Area Jurisdictions.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

Another way to measure segregation is by using a **dissimilarity index**:

▪ This index measures how evenly any two groups are distributed across neighborhoods relative to their representation in a city overall. The dissimilarity index at the jurisdiction level can be interpreted as the share of either group that would have to move neighborhoods to create perfect integration for these two groups.

▪ The dissimilarity index ranges from 0 to 1. Higher values indicate that groups are more unevenly distributed (e.g., they tend to live in different neighborhoods).

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DISSIMILARITY INDEX GUIDANCE FOR CITIES WITH SMALL RACIAL GROUP POPULATIONS

The analysis conducted for this report suggests that dissimilarity index values are unreliable for a population group if that group represents approximately less than 5% of the jurisdiction's total population.

HCD's AFFH guidance requires the Housing Element to include the dissimilarity index values for racial groups, but also offers flexibility in emphasizing the importance of various measures. ABAG/MTC recommends that when cities have population groups that are less than 5% of the jurisdiction's population (see Table **Error! Reference source not found.**), jurisdiction staff use the isolation index or Thiel's H-Index to gain a more accurate understanding of their jurisdiction's neighborhood-level segregation patterns (*intra*-city segregation).

If a jurisdiction has a very small population of a racial group, this indicates that segregation between the jurisdiction and the region (*inter*-city segregation) is likely to be an important feature of the jurisdiction's segregation patterns.

In Town of Portola Valley, the Black/African American group is 0.2 percent of the population - so staff should

</div>

Table 2 below provides the dissimilarity index values of racial groups within the town, indicating the levels of segregation in Portola Valley between white residents and residents who are Black, Latinx, or Asian/Pacific Islander. The table also provides the dissimilarity index between white residents and all residents of color in the jurisdiction, and dissimilarity indices for the years 2000, 2010, and 2020.

TABLE 2: RACIAL DISSIMILARITY INDEX VALUES FOR SEGREGATION WITHIN PORTOLA VALLEY

Race	Portola Valley			Bay Area Average
	2000	**2010**	**2020**	**2020**
Asian/Pacific Islander vs. White	0.065*	0.041	0.107	0.226
Black/African American vs. White	0.115*	0.280*	0.175*	0.312
Latinx vs. White	0.149*	0.099*	0.060	0.246
People of Color vs. White	0.035	0.035	0.076	0.198

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.
Note: If a number is marked with an asterisk (*), it indicates that the index is based on a racial group making up less than 5 percent of the jurisdiction population, leading to unreliable numbers.

In Portola Valley, the highest dissimilarity index is between Black and white residents (see Table 2). Portola Valley's Black /white dissimilarity index of 0.175 means that 17.5% of Black (or white) residents would need to move to a neighborhood of differing racial prominence to create a distribution of Black and white residents in each neighborhood, equal to that of the entire town. However, per HCD guidance included in the above callout box, this dissimilarity index value is not a reliable data point due to the relatively small population size of Black residents as a portion of the entire town population (2 percent). While the Black/white dissimilarity index in Portola Valley is relatively low and is typically associated with "low segregation" levels per HUD standards, it is not necessarily indicative of high levels of integration within the town. The "Bay Area Average" column is included in this table to also provide the average dissimilarity index values for these racial group pairings across Bay Area jurisdictions in 2020. The data in this column can be used as a comparison to provide context for the

levels of segregation between communities of color are from white residents in this jurisdiction. For example, Table 2 indicates that the average Latinx/white dissimilarity index for a Bay Area jurisdiction is 0.246, so on average 24.6% of Latinx (or white residents) in a Bay Area jurisdiction would need to move to a neighborhood of differing racial prominence within that jurisdiction to create a distribution of Latinx and white residents that resembles that of the larger jurisdiction. This index is nearly 4 times that of Portola Valley's for the same racial groups in the same year. The Latinx/white dissimilarity index in Portola Valley in 2020 was 0.060, meaning 6% of Latinx (or white residents) in the town would need to move to a neighborhood of differing racial prominence within that town to create a distribution of Latinx and white residents that resembles that of the overall town.

The **Theil's H Index** can be used to measure segregation between all groups within a jurisdiction:

- This index measures how diverse each neighborhood is compared to the diversity of the whole city. Neighborhoods are weighted by their size, so that larger neighborhoods play a more significant role in determining the total measure of segregation.

- The index ranges from 0 to 1. A Theil's H Index value of 0 would mean all neighborhoods within a city have the same demographics as the whole city. A value of 1 would mean each group lives exclusively in their own, separate neighborhood.

- For jurisdictions with a high degree of diversity (multiple racial groups comprise more than 10% of the population), Theil's H offers the clearest summary of overall segregation.

The Theil's H Index values for neighborhood racial segregation in Portola Valley for the years 2000, 2010, and 2020 can be found in Table 3 below. The "Bay Area Average" column in the table provides the average Theil's H Index across Bay Area jurisdictions in 2020. Between 2010 and 2020, the Theil's H Index for racial segregation in Portola Valley declined, suggesting that there is now less neighborhood level racial segregation within the jurisdiction. In 2020, the Theil's H Index for racial segregation in Portola Valley was lower than the average value for Bay Area jurisdictions, indicating that neighborhood level racial segregation in Portola Valley is less than in the average Bay Area city. Since Portola Valley has a low degree of diversity, this measure is not as useful as it would be in more diverse communities.

TABLE 3:   THEIL'S H INDEX VALUES FOR RACIAL SEGREGATION WITHIN PORTOLA VALLEY

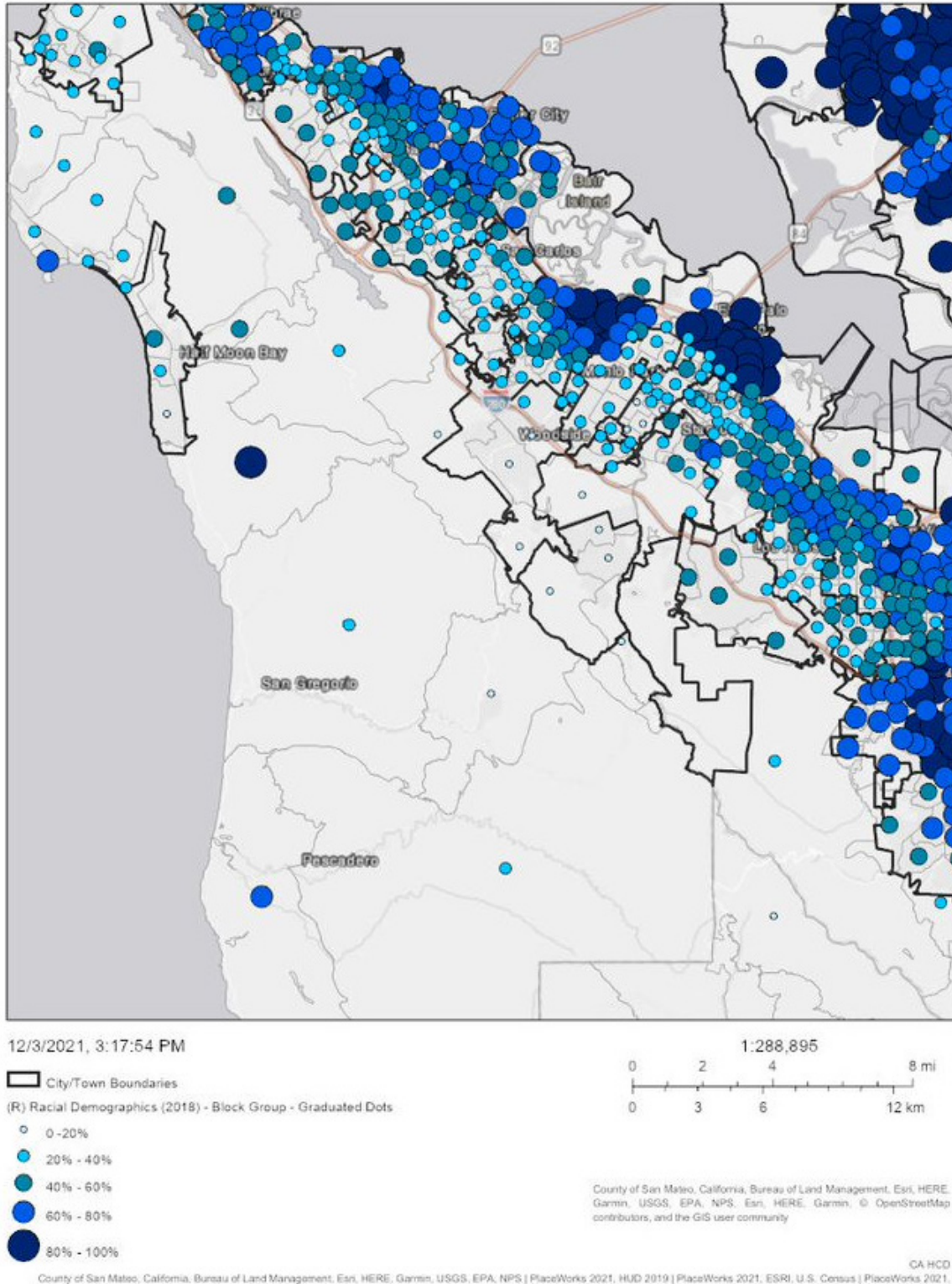|	Portola Valley			Bay Area Average
Race	**2000**	**2010**	**2020**	**2020**
Theil's H Multi-racial	0.008	0.005	0.004	0.055

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Geospatially, all census tracts (i.e., neighborhoods) in Portola Valley are White majority census tracts.[13],[14]

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[13] Majority census tracts show the predominant racial or ethnic group by tract compared to the next most populous.

[14] Redlining maps, otherwise known as Home Owners' Loan Corporation (HOLC) maps, are not available for San Mateo County.

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City/Town Boundaries

(R) Racial Demographics (2018) - Block Group - Graduated Dots

○ 0 - 20%

● 20% - 40%

● 40% - 60%

● 60% - 80%

● 80% - 100%

1:288,895
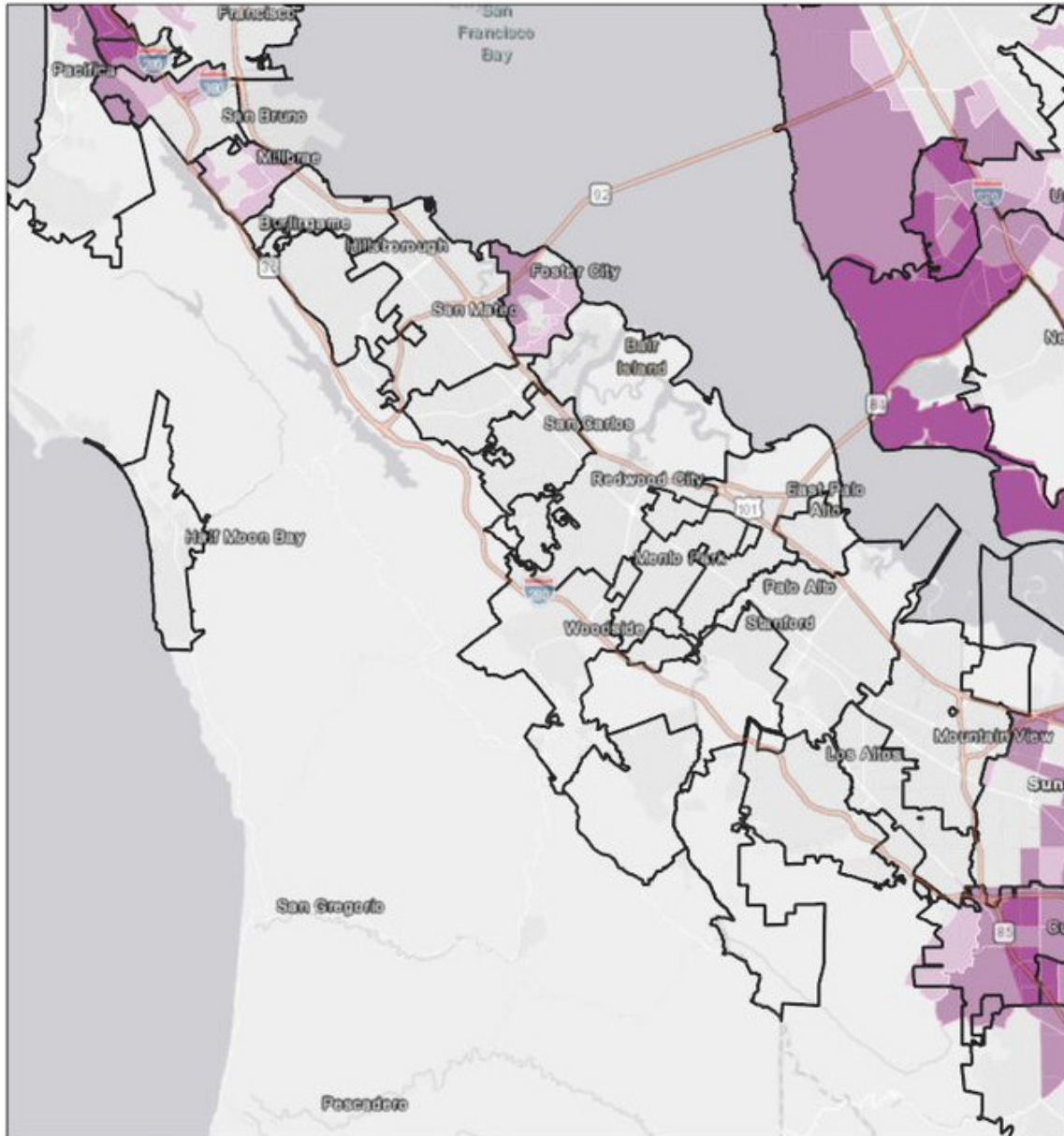
0 2 4 8 mi

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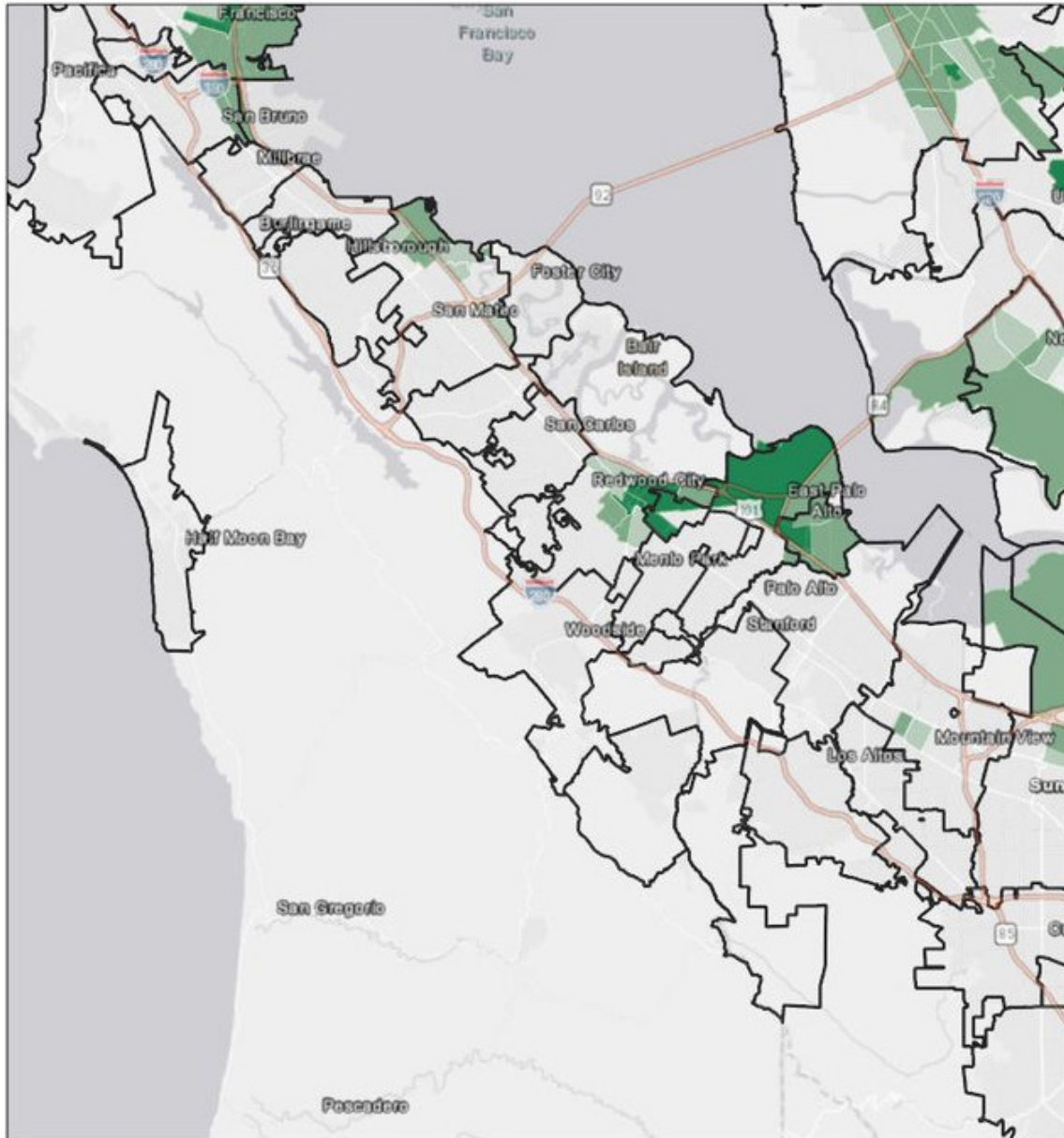County of San Mateo, California, Bureau of Land Management, Esri, HERE,
Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap
contributors, and the GIS user community

CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021.
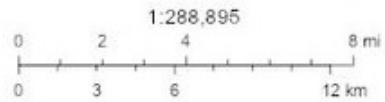
FIGURE 13: PERCENT NON-WHITE POPULATION BY CENSUS BLOCK GROUPS, 2018

Source: California Department of Housing and Community Development AFFH Data Viewer

FIGURE 14: WHITE MAJORITY CENSUS TRACTS

Source: California Department of Housing and Community Development AFFH Data Viewer

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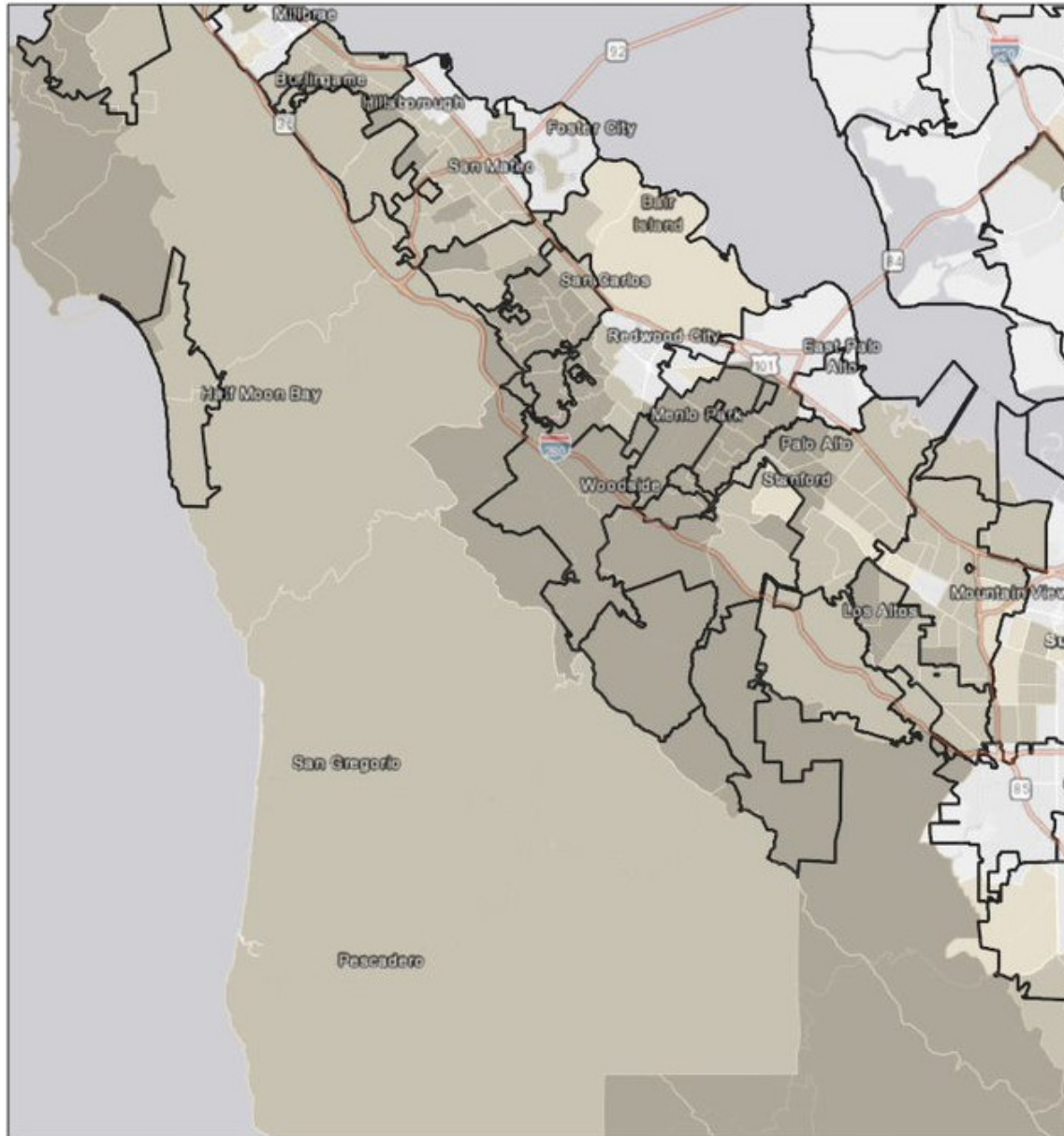
City/Town Boundaries

(R) Predominant Population - Asian Majority Tracts

Slim (gap < 10%)

Sizeable (gap 10% – 50%)

Predominant (gap > 50%)
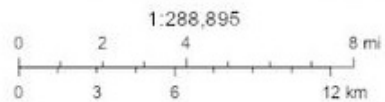
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CA HCD

Redwood City, County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census |

FIGURE 15: ASIAN MAJORITY CENSUS TRACTS

Source: California Department of Housing and Community Development AFFH Data Viewer

FIGURE 16: HISPANIC MAJORITY CENSUS TRACTS

Source: California Department of Housing and Community Development AFFH Data Viewer

Regional Racial Segregation (*Between* Portola Valley and Other Jurisdictions)

At the regional level, segregation is measured between *cities* instead of between *neighborhoods*. Racial dot maps are not only useful for examining neighborhood racial segregation within a jurisdiction, but these maps can also be used to explore the racial demographic differences between different jurisdictions in the region. Figure 17 below presents a racial dot map showing the spatial distribution of racial groups in Portola Valley as well as in nearby Bay Area cities. The map reflects first that Portola Valley has a much less dense population than many of the surrounding cities to the East, and that Asian residents are concentrated in Castro City, Mountain View, and Palo Alto. Latinx and Black residents are concentrated in East Palo Alto. White residents make up the majority of dots in Portola Valley and other less dense areas like Woodside.
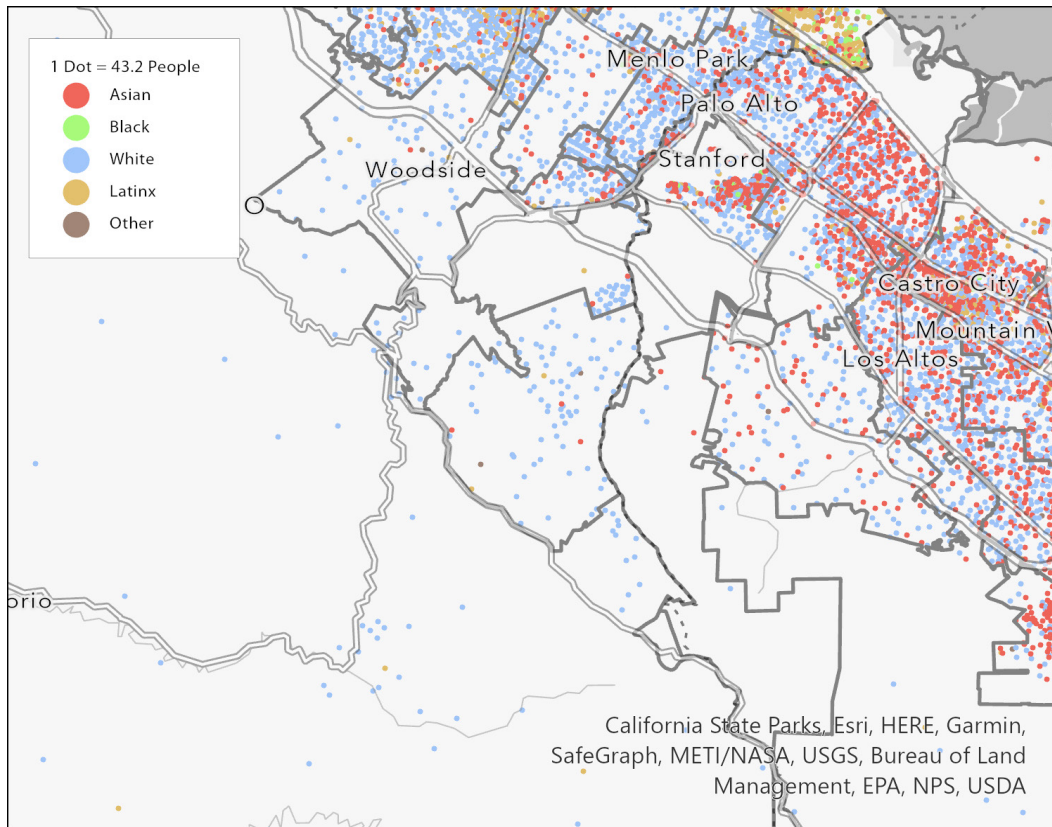
FIGURE 17: RACIAL DOT MAP OF PORTOLA VALLEY AND SURROUNDING AREAS (2020)

Universe: Population.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: The plot shows the racial distribution at the census block level for Town of Portola Valley and vicinity. Dots in each census block are randomly placed and should not be construed as actual placement of people.

To understand how each city contributes to the total segregation of the Bay Area, one can look at the difference in the racial composition of a jurisdiction compared to the racial composition of the region as a whole. The racial demographics in Portola Valley for the years 2000, 2010, and 2020 can be found in Table 4 below. The table also provides the racial composition of the nine-county Bay Area. As of 2020, Portola Valley has a higher share of white residents than the Bay Area as a whole, a much lower share of Latinx, Black, and Asian/Pacific Islander residents.

TABLE 4: POPULATION BY RACIAL GROUP, PORTOLA VALLEY, AND THE REGION

| | Portola Valley | | | Bay Area |
Race	2000	2010	2020	2020
Asian/Pacific Islander	4.0%	5.6%	7.7%	28.2%
Black/African American	0.4%	0.3%	0.2%	5.6%
Latinx	3.3%	4.0%	5.2%	24.4%
Other or Multiple Races	1.4%	1.9%	7.4%	5.9%
White	90.8%	88.2%	79.5%	35.8%

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, Census 2010, Table P4. Data for 2000 is standardized to 2010 census tract geographies and is from U.S. Census Bureau, Census 2000, Table P004.

Figure 18 below compares the racial demographics in Portola Valley to those of all 109 Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each racial group, the spread of dots represents the range of that group's representation among Bay Area jurisdictions. Additionally, the black line within each racial group notes the percentage of the population of Town of Portola Valley represented by that group and how that percentage ranks among all 109 jurisdictions. Of all Bay Area jurisdictions, Portola Valley is ranked 6th for the highest percentage of white residents. The Town is near the bottom of the percentage of Black and Latinx residents, with rankings of 107 and 103, respectively.
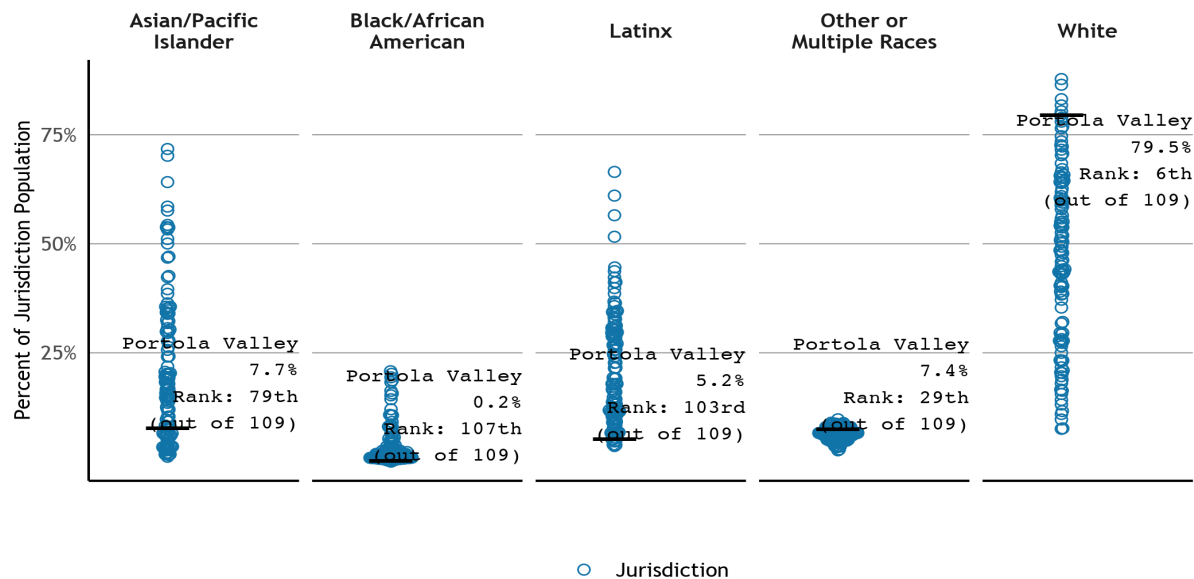
FIGURE 18: RACIAL DEMOGRAPHICS OF PORTOLA VALLEY COMPARED TO ALL BAY AREA JURISDICTIONS (2020)
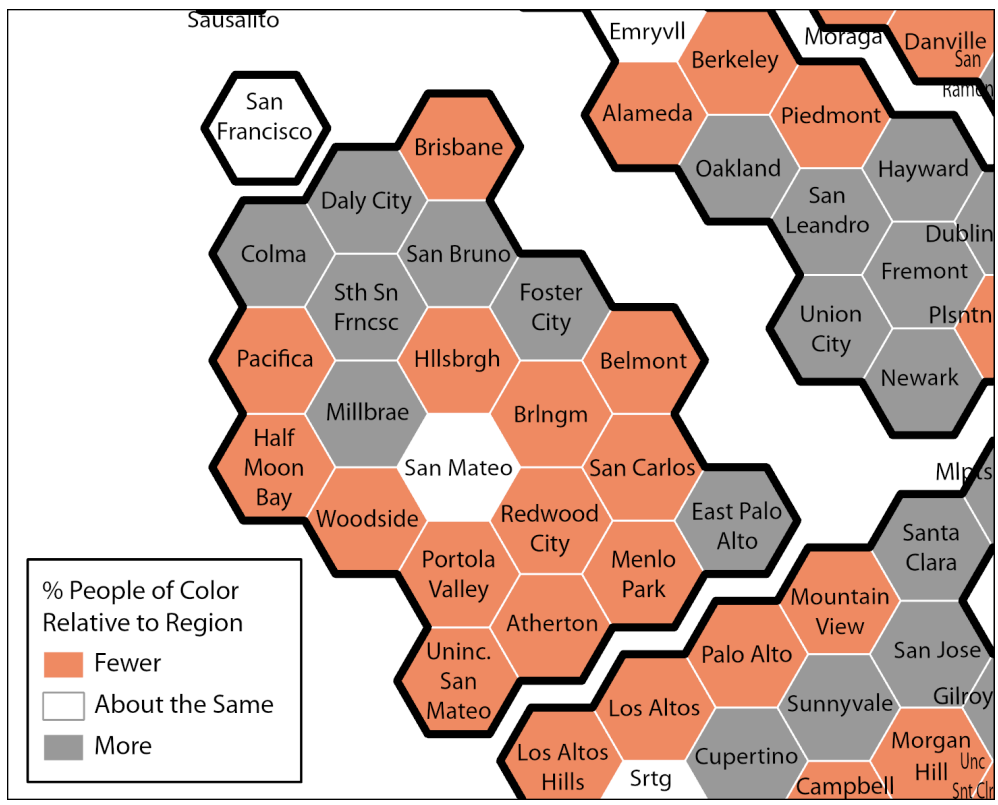
Universe: Bay Area Jurisdictions.
Source U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.

The map in Figure 19 below also illustrates regional racial segregation between Portola Valley and other jurisdictions. This map demonstrates how the percentage of people of color in Portola Valley and surrounding jurisdictions compares to the Bay Area as a whole:

- Jurisdictions shaded orange have a share of people of color that is less than the Bay Area as a whole, and the degree of difference is greater than five percentage points.

- Jurisdictions shaded white have a share of people of color comparable to the regional percentage of people of color (within five percentage points).

- Jurisdictions shaded grey have a share of people of color that is more than five percentage points greater than the regional percentage of people of color.

Portola Valley, like many surrounding jurisdictions on the Bay Area peninsula, has a share of people of color that is less than the Bay Area as a whole (greater than five percentage points). People of color are more concentrated in East Palo Alto, Millbrae, Cupertino, and Sunnyvale (among others).

FIGURE 19: COMPARING THE SHARE OF PEOPLE OF COLOR IN PORTOLA VALLEY AND VICINITY TO THE BAY AREA (2020)

Universe: Population.
Source: U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002.
Note: People of color refer to persons not identifying as non-Hispanic white. The nine-county Bay Area is the reference region for this map.

Segregation between jurisdictions in the region can also be analyzed by calculating regional values for the segregation indices discussed previously. Table 5 presents dissimilarity index, isolation index, and Theil's H index values for racial segregation for the entire nine-county Bay Area in 2010 and 2020. In the previous section of this report focused on neighborhood level racial segregation, these indices were calculated by comparing the racial demographics of the census tracts within a jurisdiction to the demographics of the jurisdiction as a whole. In Table 5, these measures are calculated by comparing the racial demographics of local jurisdictions to the region's racial makeup. For example, looking at the 2020 data, Table 5 shows the white isolation index value for the region is 0.429, meaning that on average white Bay Area residents live in a jurisdiction that is 42.9% white in 2020. An example of regional dissimilarity index values in Table 5 is the Black/white dissimilarity index value of 0.459, which means that across the region 45.9% of Black (or white) residents would need to move to a different jurisdiction to evenly distribute Black and white residents across Bay Area jurisdictions. The dissimilarity index values in Table 5 reflect recommendations made in HCD's AFFH guidance for calculating dissimilarity at the region level.[15] The regional value for the Theil's H index measures how diverse each Bay Area jurisdiction is compared to the racial diversity of the whole region. A Theil's H Index value of 0 would mean all *jurisdictions* within the Bay Area have the same racial demographics as the entire region, while a value of 1 would mean each racial group lives exclusively in their own separate jurisdiction. The regional Theil's H index value for racial segregation decreased slightly between 2010 and 2020, meaning that racial groups in the Bay Area are now slightly less separated by the borders between jurisdictions.

**TABLE 5: REGIONAL RACIAL SEGREGATION MEASURES**

Index	Group	2010	2020
Isolation Index Regional Level	Asian/Pacific Islander	0.317	0.378
	Black/African American	0.144	0.118
	Latinx	0.283	0.291
	White	0.496	0.429
	People of Color	0.629	0.682
Dissimilarity Index Regional Level	Asian/Pacific Islander vs. White	0.384	0.369
	Black/African American vs. White	0.475	0.459
	Latinx vs. White	0.301	0.297
	People of Color vs. White	0.296	0.293
Theil's H Multi-racial	All Racial Groups	0.103	0.097

Universe: Population.
Source: IPUMS National Historical Geographic Information System (NHGIS). U.S. Census Bureau, 2020 Census State Redistricting Data (Public Law 94-171) Summary File, 2020 Census of Population and Housing, Table P002. Data from 2010 is from U.S. Census Bureau, 2010 Census of Population and Housing, Table P4.
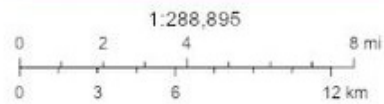
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[15] For more information on HCD's recommendations regarding data considerations for analyzing integration and segregation patterns, see page 31 of the AFFH Guidance Memo.
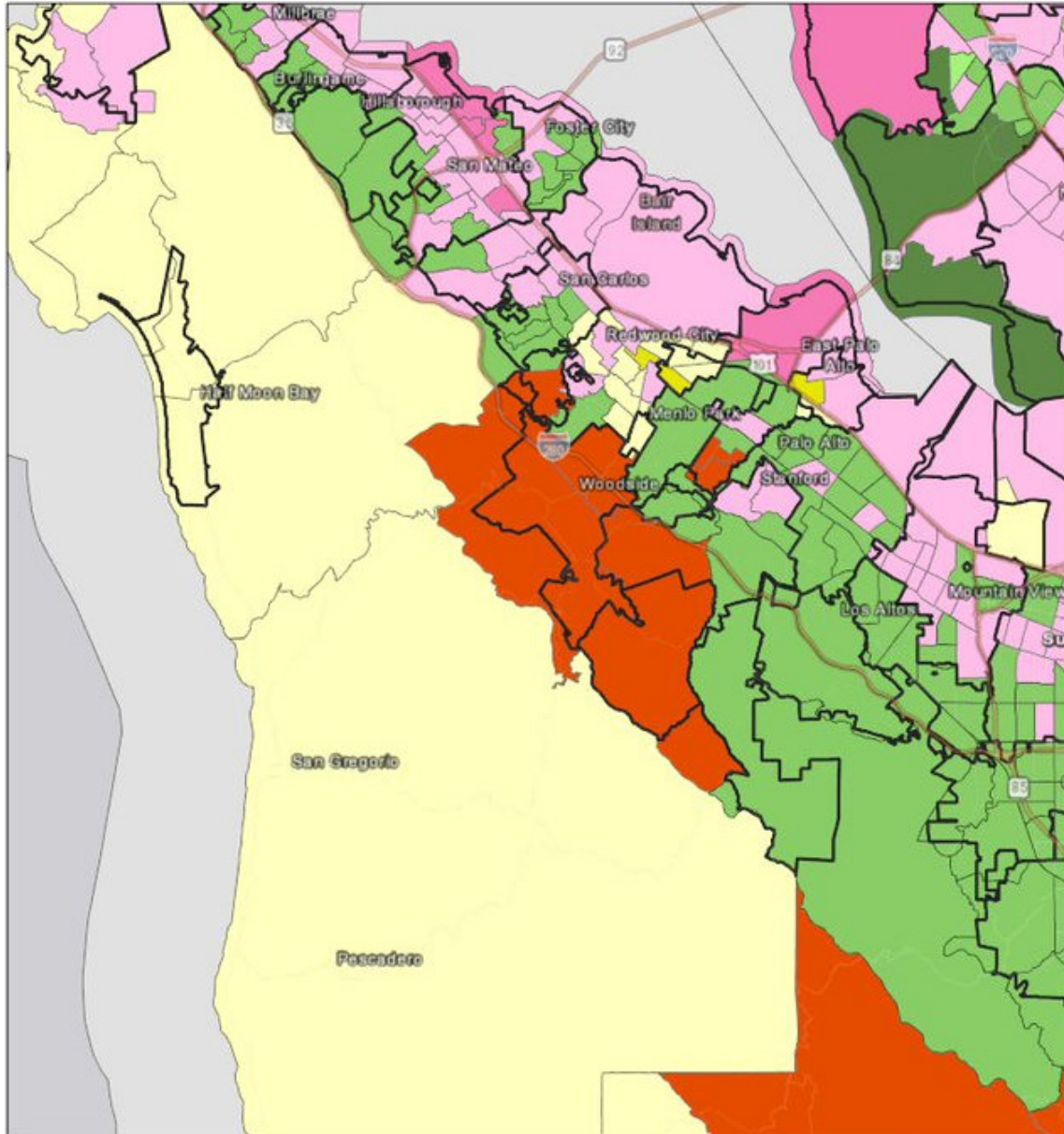
FIGURE 20: NEIGHBORHOOD SEGREGATION BY CENSUS TRACT, 2019

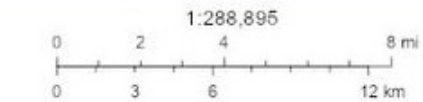*Source: California Department of Housing and Community Development AFFH Data Viewer*

FIGURE 21: DIVERSITY INDEX BY BLOCK GROUP, 2010

Source: California Department of Housing and Community Development AFFH Data Viewer

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1:288,895
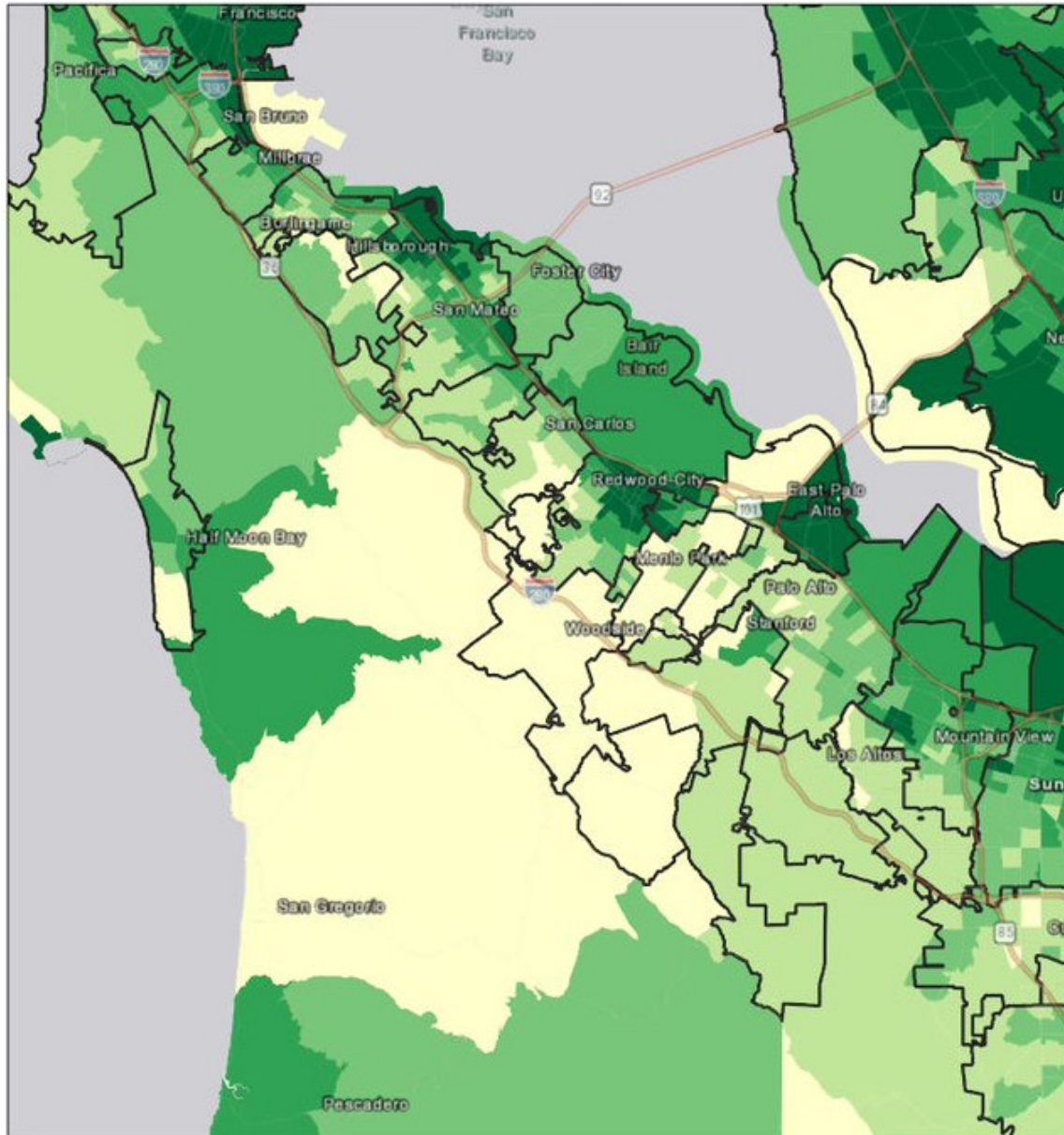
City/Town Boundaries

(A) Diversity Index (2018) - Block Group

Lower Diversity

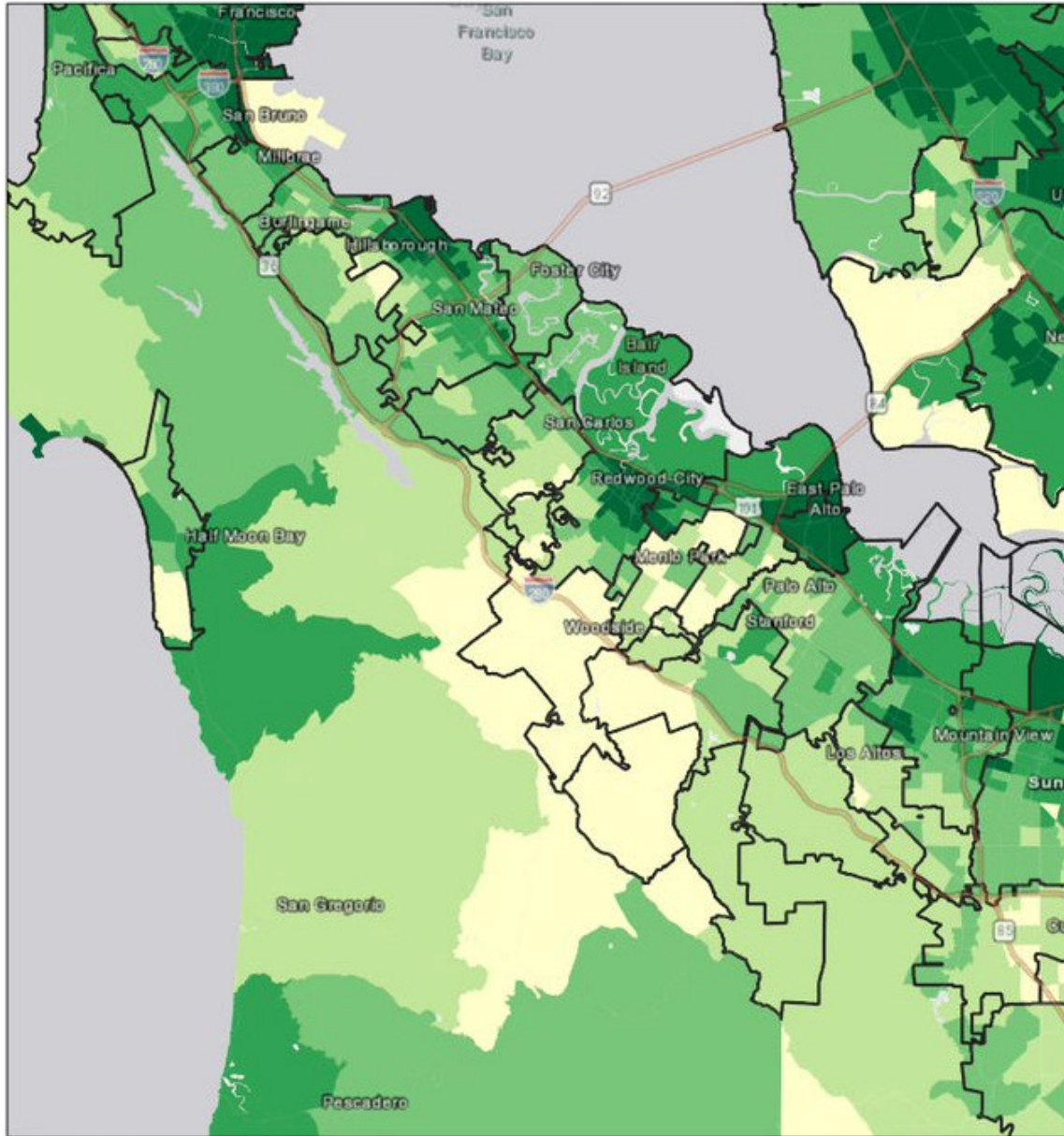40 - 55

55 - 70

70 - 85

Higher Diversity

0   2   4   8 mi

0   3   6   12 km

Esri, HERE, Garmin, © OpenStreetMap contributors, and the GIS user community, Redwood City, County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS

CA HCD

Redwood City, County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census |
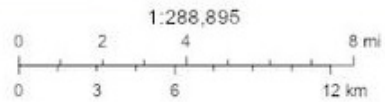
FIGURE 22: DIVERSITY INDEX BY BLOCK GROUP, 2018

Source: California Department of Housing and Community Development AFFH Data Viewer

4.3.2 INCOME SEGREGATION IN TOWN OF PORTOLA VALLEY

DEFINITION OF TERMS – INCOME GROUPS

When analyzing segregation by income, this report uses income group designations consistent with the Regional Housing Needs Allocation and the Housing Element:

Very low-income: individuals earning less than 50% of Area Median Income (AMI)

Low-income: individuals earning 50%-80% of AMI

**Moderate-income:** individuals earning 80%-120% of AMI

Above moderate-income: individuals earning 120% or more of AMI

Additionally, this report uses the term "lower-income" to refer to all people who earn less than 80% of AMI, which includes both low-income and very low-income individuals.

The income groups described above are based on U.S. Department of Housing and Urban Development (HUD) calculations for AMI. HUD calculates the AMI for different metropolitan areas, and the nine county Bay Area includes the following metropolitan areas: Napa Metro Area (Napa County), Oakland-Fremont Metro Area (Alameda and Contra Costa Counties), San Francisco Metro Area (Marin, San Francisco, and San Mateo Counties), San Jose-Sunnyvale-Santa Clara Metro Area (Santa Clara County), Santa Rosa Metro Area (Sonoma County), and Vallejo-Fairfield Metro Area (Solano County).

The income categories used in this report are based on the AMI for the HUD metro area where this jurisdiction is located.

The household income distribution by percent of area median income (AMI) in Portola Valley reflects a substantially higher share of higher income household than the county overall: 73% of households in Portola earn more than 100% AMI compared to 49% in the county overall.
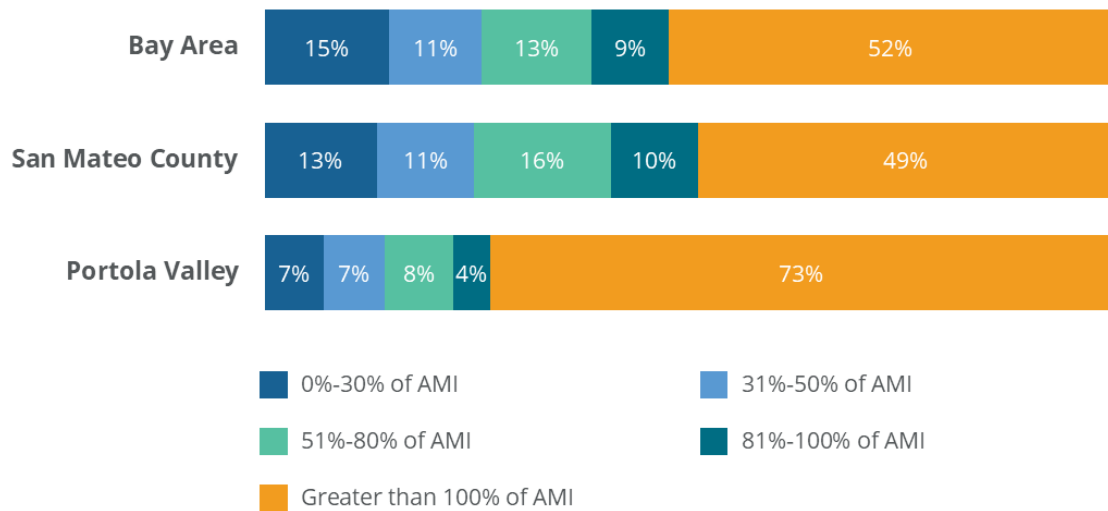

FIGURE 23: SHARE OF HOUSEHOLDS BY AREA MEDIAN INCOME (AMI), 2019

Source: ABAG Housing Needs Data Workbook

Neighborhood Level Income Segregation (*within* Portola Valley)

Income segregation can be measured using similar indices as racial segregation. Income dot maps, similar to the racial dot maps shown in Figures 24, are useful for visualizing segregation between multiple income groups at the same time. The income dot map of Portola Valley below offers a visual representation of the spatial distribution of income groups within the jurisdiction. As with the racial dot maps, when the dots show lack of a pattern or clustering, income segregation measures tend to be lower, and conversely, when clusters are apparent, the segregation measures may be higher as well.
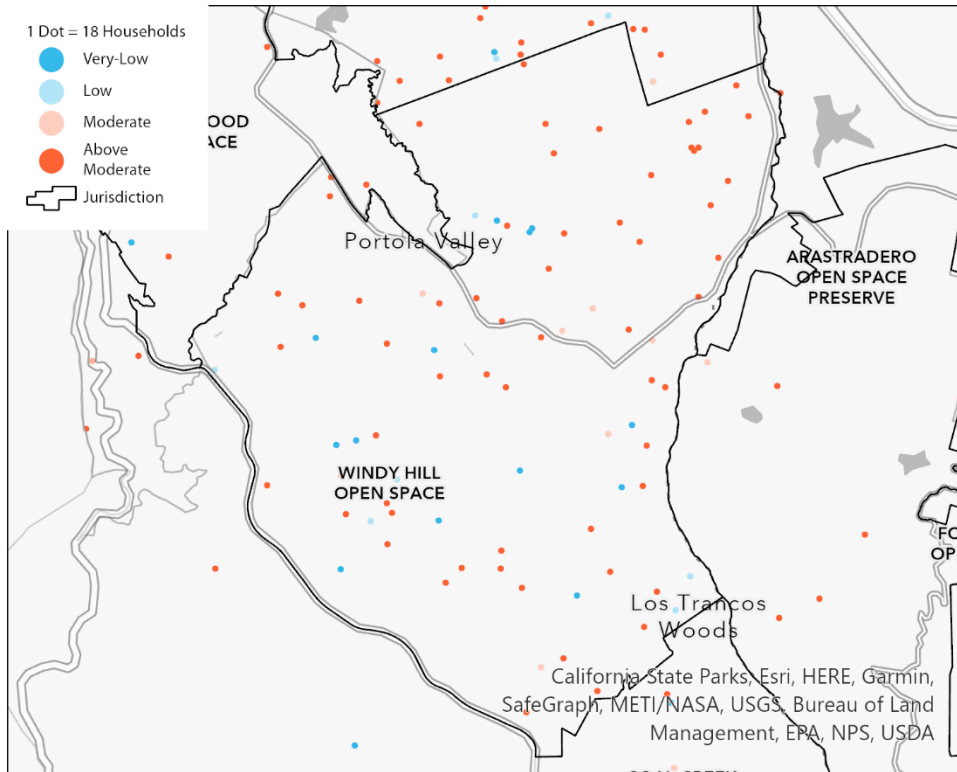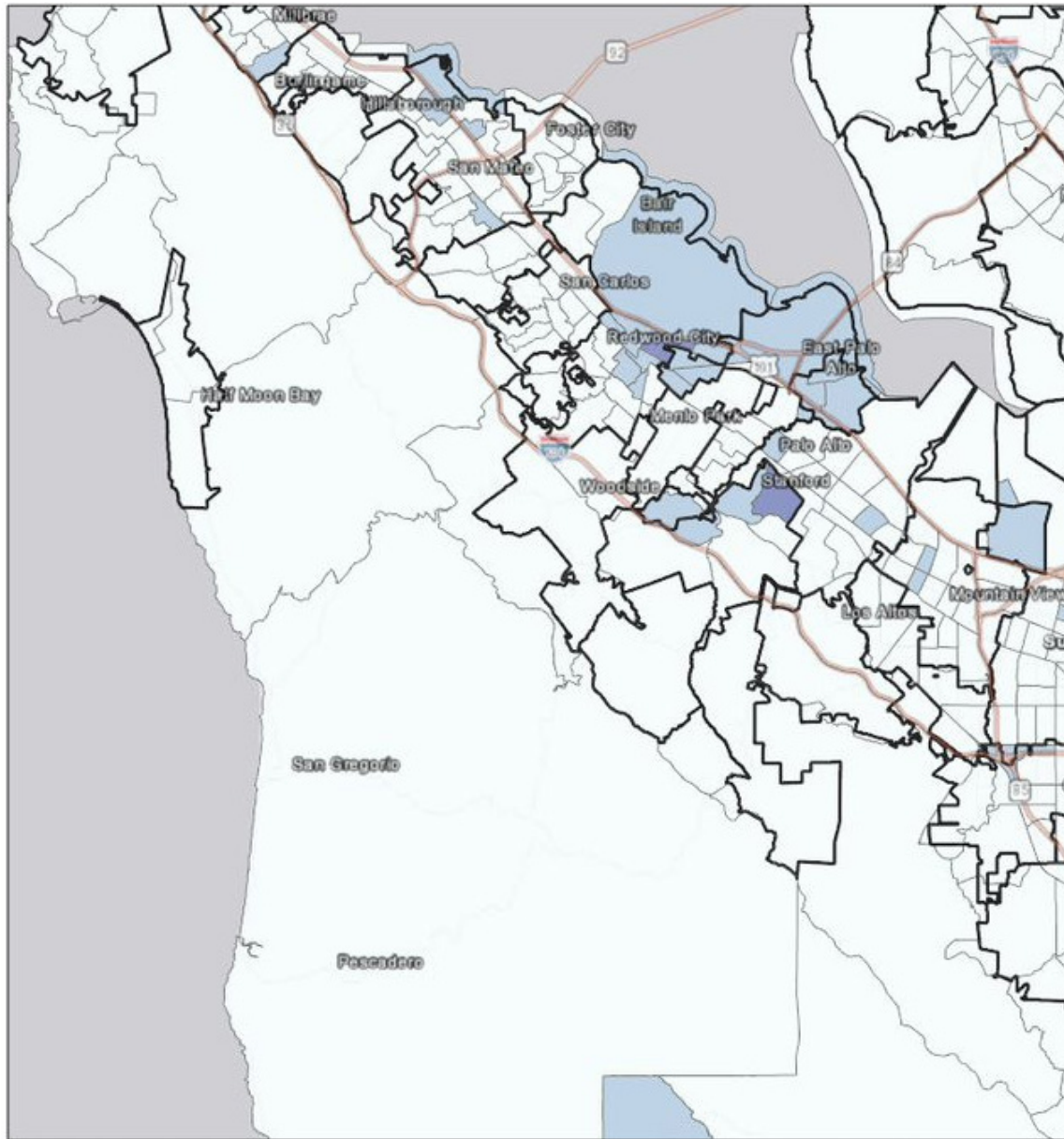

FIGURE 24: INCOME DOT MAP OF PORTOLA VALLEY (2015)

Universe: Population.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.
Note: The plot shows the income group distribution at the census block group level for Town of Portola Valley and vicinity. Dots in each block group are randomly placed and should not be construed as actual placement of individuals.

All census block groups in the town have median incomes above $125,000 and poverty is low throughout Portola Valley.
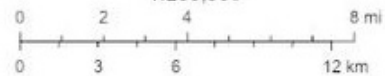
FIGURE 25: POVERTY STATUS BY CENSUS TRACT, 2019

Source: California Department of Housing and Community Development AFFH Data Viewer

The isolation index values for all income groups in Portola Valley for the years 2010 and 2015 can be found in Table 6 below.[16] Above Moderate-income residents are the most isolated income group in Portola Valley. Portola Valley's isolation index of 0.721 for these residents means that the average Above Moderate-income resident in Portola Valley lives in a neighborhood that is 72.1% Above Moderate-income. Among all income groups, the Moderate-income population's isolation index has changed the most over time, becoming more segregated from other income groups between 2010 and 2015.

Similar to the tables presented earlier for neighborhood racial segregation, the "Bay Area Average" column in Table 6 provides the average isolation index value across Bay Area jurisdictions for different income groups in 2015. The data in this column can be used as a comparison to provide context for the levels of segregation experienced by income groups in this jurisdiction. For example, Table 6 indicates the average isolation index value for very low-income residents across Bay Area jurisdictions is 0.304, meaning that in the average Bay Area jurisdiction a very low-income resident lives in a neighborhood that is 30.4% very low-income.

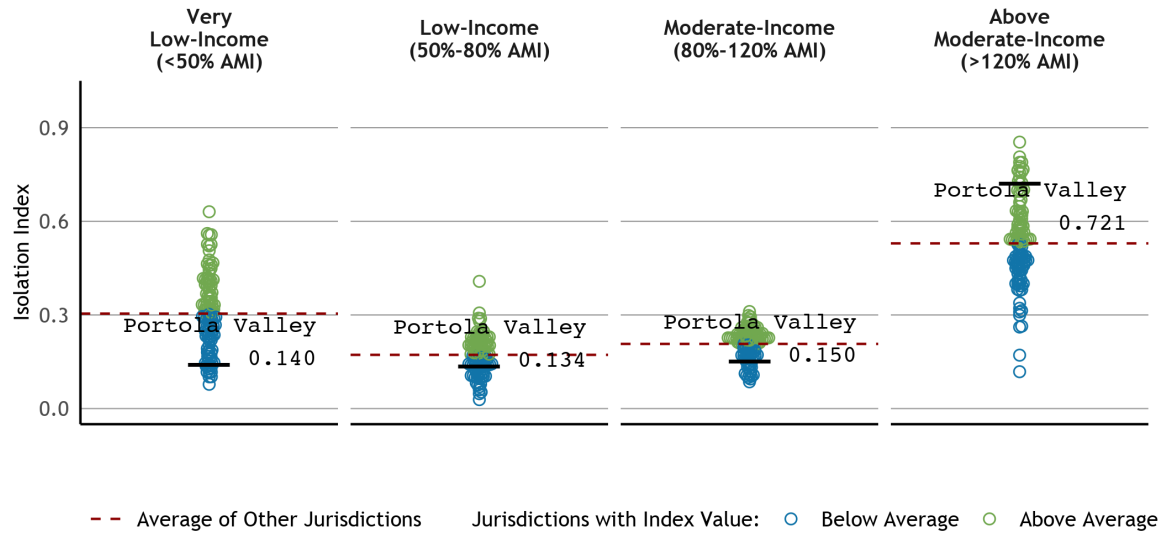**TABLE 6: INCOME GROUP ISOLATION INDEX VALUES FOR SEGREGATION WITHIN PORTOLA VALLEY**

	Portola Valley		Bay Area Average
Income Group	**2010**	**2015**	**2015**
Very Low-Income (<50% AMI)	0.093	0.140	0.304
Low-Income (50%-80% AMI)	0.144	0.134	0.172
Moderate-Income (80%-120% AMI)	0.073	0.150	0.207
Above Moderate-Income (>120% AMI)	0.765	0.721	0.529

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 26 below shows how income group isolation index values in Portola Valley compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each income group, the spread of dots represents the range of isolation index values among Bay Area jurisdictions. Additionally, the black line within each income group notes the isolation index value for that group in Portola Valley, and each dashed red line represents the Bay Area average for the isolation index for that group.

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[16] This report presents data for income segregation for the years 2010 and 2015, which is different than the time periods used for racial segregation. This deviation stems from the data source recommended for income segregation calculations in HCD's AFFH Guidelines. This data source most recently updated with data from the 2011-2015 American Community Survey 5-year estimates. For more information on HCD's recommendations for calculating income segregation, see page 32 of HCD's AFFH Guidelines.

FIGURE 26: INCOME GROUP ISOLATION INDEX VALUES FOR PORTOLA VALLEY COMPARED TO OTHER BAY AREA JURISDICTIONS (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

Table 7 below provides the dissimilarity index values indicating the level of segregation in Portola Valley between residents who are lower-income (earning less than 80% of AMI) and those who are not lower-income (earning above 80% of AMI). This data aligns with the requirements described in HCD's AFFH Guidance Memo for identifying dissimilarity for lower-income households.[17] Segregation in Portola Valley between lower-income residents and residents who are not lower-income decreased between 2010 and 2015. Additionally, Table 7 shows dissimilarity index values for the level of segregation in Albany between residents who are very low-income (earning less than 50% of AMI) and those who are above moderate-income (earning above 120% of AMI). This supplementary data point provides additional nuance to an analysis of income segregation, as this index value indicates the extent to which a jurisdiction's lowest and highest income residents live in separate neighborhoods.

Similar to other tables in this report, the "Bay Area Average" column shows the average dissimilarity index values for these income group pairings across Bay Area jurisdictions in 2015. For example, Table 7 indicates that the average dissimilarity index between lower-income residents and other residents in a Bay Area jurisdiction is 0.274, so on average 27.4% of lower-income residents in a Bay Area jurisdiction would need to move to a different neighborhood within the jurisdiction to create perfect income group integration in that jurisdiction.

Figure 27 below shows how dissimilarity index values for income segregation in Portola Valley compare to values in other Bay Area jurisdictions. In this chart, each dot represents a Bay Area jurisdiction. For each income group pairing, the spread of dots represents the range of dissimilarity

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[17] For more information, see page 32 of HCD's AFFH Guidance Memo.

index values among Bay Area jurisdictions. Additionally, the black line within each income group pairing notes the dissimilarity index value in Portola Valley, and each dashed red line represents the Bay Area average for the dissimilarity index for that pairing.

In 2015, the income segregation in Portola Valley between lower-income residents and other residents was higher than the average value for Bay Area jurisdictions for the below 80% AMI vs. above 80% AMI income group (see Table 7 and Figure 27). This means that the lower-income residents are more segregated from other residents within Portola Valley compared to other jurisdictions in the region.

TABLE 7:   INCOME GROUP DISSIMILARITY INDEX VALUES FOR SEGREGATION WITHIN PORTOLA VALLEY

	Portola Valley		Bay Area Average
Income Group	**2010**	**2015**	**2015**
Below 80% AMI vs. Above 80% AMI	0.302	0.285	0.274
Below 50% AMI vs. Above 120% AMI	0.245	0.275	0.351

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low-and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.
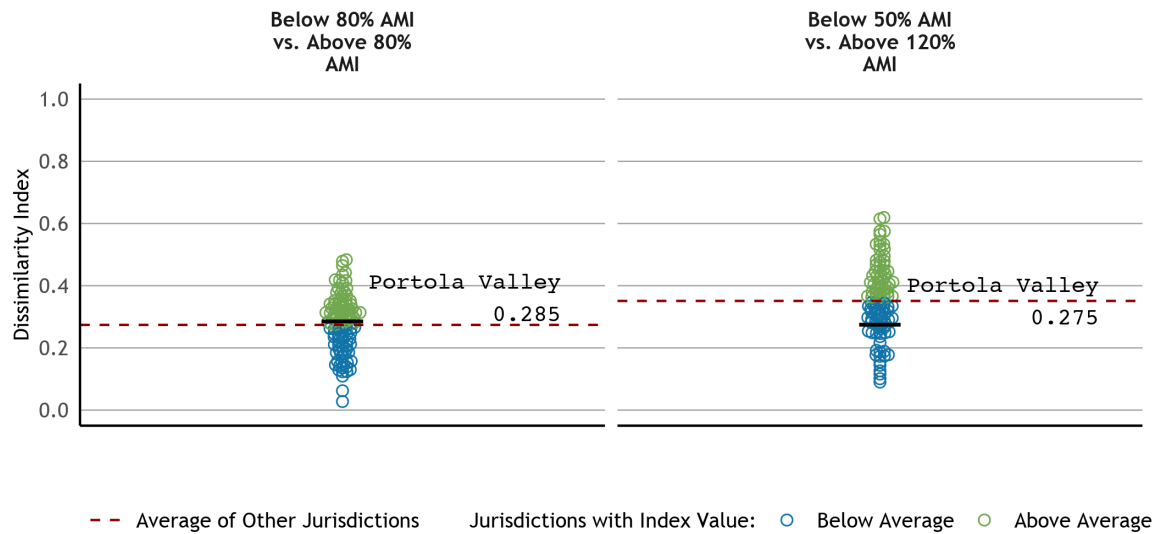
FIGURE 27: INCOME GROUP DISSIMILARITY INDEX VALUES FOR PORTOLA VALLEY COMPARED TO OTHER BAY AREA JURISDICTIONS (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

The Theil's H Index values for neighborhood income group segregation in Portola Valley for the years 2010 and 2015 can be found in Table 8 below. The "Bay Area Average" column in this table provides the average Theil's H Index value across Bay Area jurisdictions for different income groups in 2015. By 2015, the Theil's H Index value for income segregation in Portola Valley was more than it had been in 2010. In 2015, the Theil's H Index value for income group segregation in Portola Valley was lower than

the average value for Bay Area jurisdictions, indicating there is less neighborhood level income segregation in Portola Valley than in the average Bay Area city.

TABLE 8: THEIL'S H INDEX VALUES FOR INCOME SEGREGATION WITHIN PORTOLA VALLEY

	Portola Valley		Bay Area Average
Income Group	2010	2015	2015
Theil's H Multi-income	0.046	0.088	0.089

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 28 below shows how Theil's H index values for income group segregation in Portola Valley compare to values in other Bay Area jurisdictions in 2015. In this chart, each dot represents a Bay Area jurisdiction. Additionally, the black line notes the Theil's H index value for income group segregation in Portola Valley, and the dashed red line represents the average Theil's H index value across Bay Area jurisdictions.
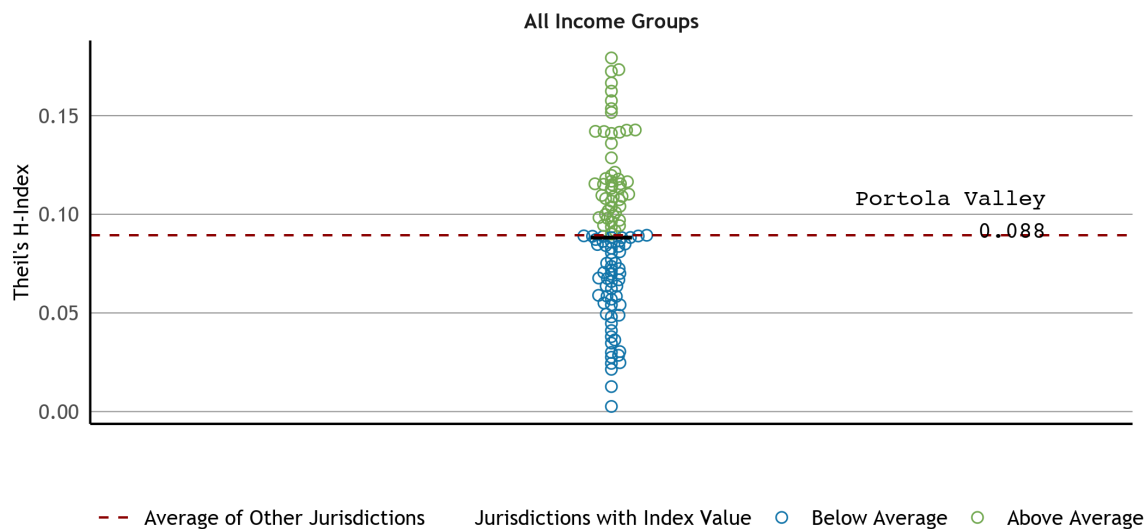

FIGURE 28: INCOME GROUP THEIL'S H INDEX VALUES FOR PORTOLA VALLEY COMPARED TO OTHER BAY AREA JURISDICTIONS (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

Regional Income Segregation (between Portola Valley and other jurisdictions)

At the regional level, segregation is measured between jurisdictions instead of between neighborhoods. Income dot maps are not only useful for examining neighborhood income segregation within a jurisdiction, but these maps can also be used to explore income demographic differences between jurisdictions in the region. Figure 29 below presents an income dot map showing the spatial distribution of income groups in Portola Valley as well as in nearby Bay Area jurisdictions.
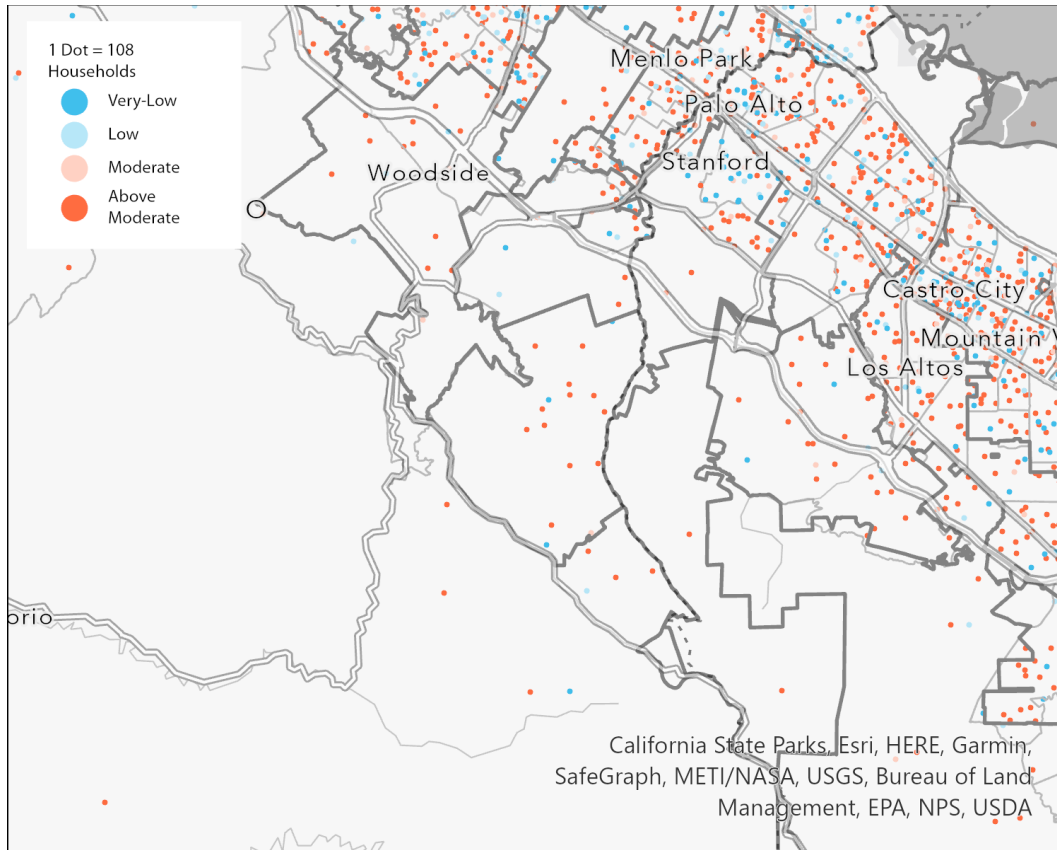
FIGURE 29: INCOME DOT MAP OF PORTOLA VALLEY AND SURROUNDING AREAS (2015)

Universe: Population.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.
Note: The plot shows the income group distribution at the census block group level for Town of Portola Valley and vicinity. Dots in each block group are randomly placed and should not be construed as actual placement of individuals.

When looking at income segregation between jurisdictions in the Bay Area, one can examine how Portola Valley differs from the region. The income demographics in Portola Valley for the years 2010 and 2015 can be found in Table 9 below. The table also provides the income composition of the nine-county Bay Area in 2015. As of that year, Portola Valley had a lower share of very low-income residents than the Bay Area as a whole, a lower share of low-income residents, a lower share of moderate-income residents, and a higher share of above moderate-income residents.

**TABLE 9   POPULATION BY INCOME GROUP, PORTOLA VALLEY, AND THE REGION**

	Portola Valley		Bay Area
Income Group	**2010**	**2015**	**2015**
Very Low-Income (<50% AMI)	7.68%	11.09%	28.7%
Low-Income (50%-80% AMI)	10.12%	10.53%	14.3%
Moderate-Income (80%-120% AMI)	7.1%	9.29%	17.6%
Above Moderate-Income (>120% AMI)	75.1%	69.09%	39.4%

Universe: Population.
Source: Data for 2015 is from Housing U.S. Department of and Urban Development, American Community Survey 5-Year 2011-

2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2006-2010 Low- and Moderate-Income Summary Data.

Figure 30 below compares the income demographics in Portola Valley to other Bay Area jurisdictions. Like the chart in Figure 29, each dot represents a Bay Area jurisdiction. For each income group, the spread of dots represents the range of that group's representation among Bay Area jurisdictions. The smallest range is among jurisdictions' moderate-income populations, while Bay Area jurisdictions vary the most in the share of their population that is above moderate-income. Additionally, the black lines within each income group note the percentage of Portola Valley population represented by that group and how that percentage ranks among other jurisdictions. Portola Valley has a much lower number of Very Low-Income residents compared to the Bay Area, with a rank of 98th lowest out of 109 jurisdictions. The number of low income and moderate-income residents is also low. The number of above moderate-income residents is notably high, with a rank of 14 in the Bay Area.
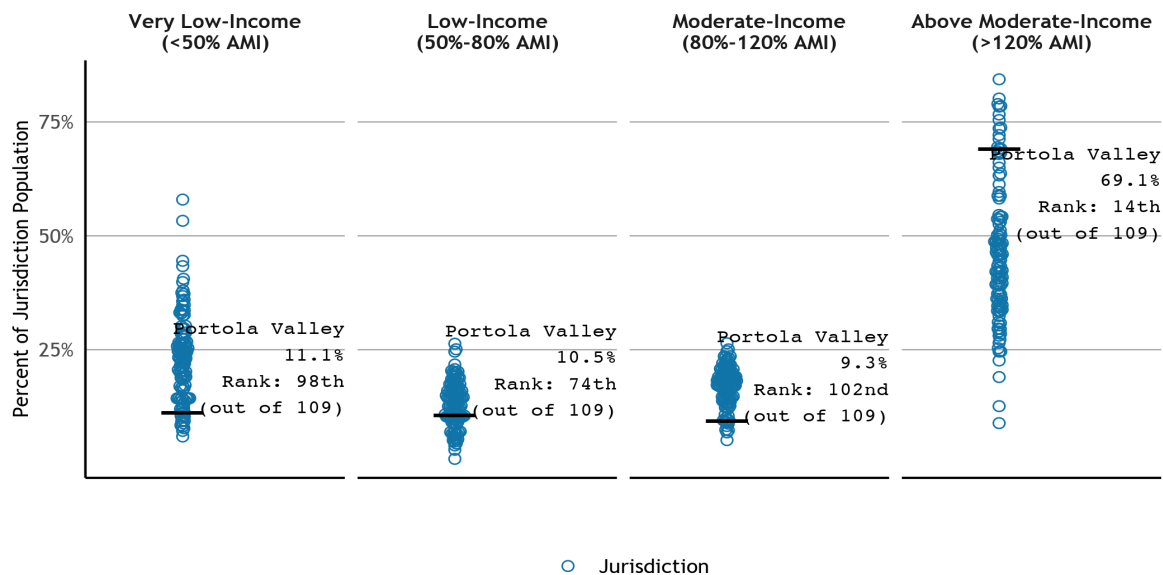
FIGURE 30: INCOME DEMOGRAPHICS OF PORTOLA VALLEY COMPARED TO OTHER BAY AREA JURISDICTIONS (2015)

Universe: Bay Area Jurisdictions.
Source: U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data.

Income segregation between jurisdictions in the region can also be analyzed by calculating regional values for the segregation indices discussed previously. Similar to the regional racial segregation measures shown in Table 5, Table 10 presents dissimilarity index, isolation index, and Theil's H index values for income segregation for the entire nine-county Bay Area in 2010 and 2015. In the previous section of this report focused on neighborhood level income segregation, segregation indices were calculated by comparing the income demographics of the census tracts within a jurisdiction to the demographics of the jurisdiction as a whole. In Table 10, these measures are calculated by comparing the income demographics of local jurisdictions to the region's income group makeup. For example, looking at 2015 data, Table 10 shows the regional isolation index value for very low-income residents

is 0.315 for 2015, meaning that on average very low-income Bay Area residents live in a jurisdiction that is 31.5% very low-income. The regional dissimilarity index for lower-income residents and other residents is 0.194 in 2015, which means that across the region 19.4% of lower-income residents would need to move to a different jurisdiction to create perfect income group integration in the Bay Area as a whole. The regional value for the Theil's H index measures how diverse each Bay Area jurisdiction is compared to the income group diversity of the whole region. A Theil's H Index value of 0 would mean all jurisdictions within the Bay Area have the same income demographics as the entire region, while a value of 1 would mean each income group lives exclusively in their own separate jurisdiction. The regional Theil's H index value for income segregation decreased slightly between 2010 and 2015, meaning that income groups in the Bay Area are now slightly less separated by the borders between jurisdictions.

TABLE 10: REGIONAL INCOME SEGREGATION MEASURES

Index	Group	2010	2015
Isolation Index Regional Level	Very Low-Income (<50% AMI)	0.277	0.315
	Low-Income (50%-80% AMI)	0.157	0.154
	Moderate-Income (80%-120% AMI)	0.185	0.180
	Above Moderate-Income (>120% AMI)	0.467	0.435
Dissimilarity Index Regional Level	Below 80% AMI vs. Above 80% AMI	0.186	0.194
	Below 50% AMI vs. Above 120% AMI	0.238	0.248
Theil's H Multi-income	All Income Groups	0.034	0.032

Universe: Population.
Source: Data for 2015 is from U.S. Department of Housing and Urban Development, American Community Survey 5-Year 2011-2015 Low- and Moderate-Income Summary Data. Data for 2010 is from U.S. Department of Housing and Urban Development, American Community Survey 5\-Year 2006-2010 Low- and Moderate-Income Summary Data.

4.3.3 SEGREGATION OF SPECIAL NEEDS HOUSEHOLDS IN TOWN OF PORTOLA VALLEY

As mentioned at the beginning of the section on Segregation and Integration, segregation is not solely a racial matter. Segregation can also occur by familial status or for persons with disabilities who have limited interaction outside of congregate and/or institutional facilities. This section evaluates segregation of these segments of the population.

Disability Status

The **share of the population living with at least one disability is 10% in the Portola Valley** compared to 8% in San Mateo County. No census tracts in the community have a concentration of people with a disability though the tract to the immediate East of Portola Valley does have a 10% to 20% share of the population living with a disability (see Figure 31). Geographic concentrations of
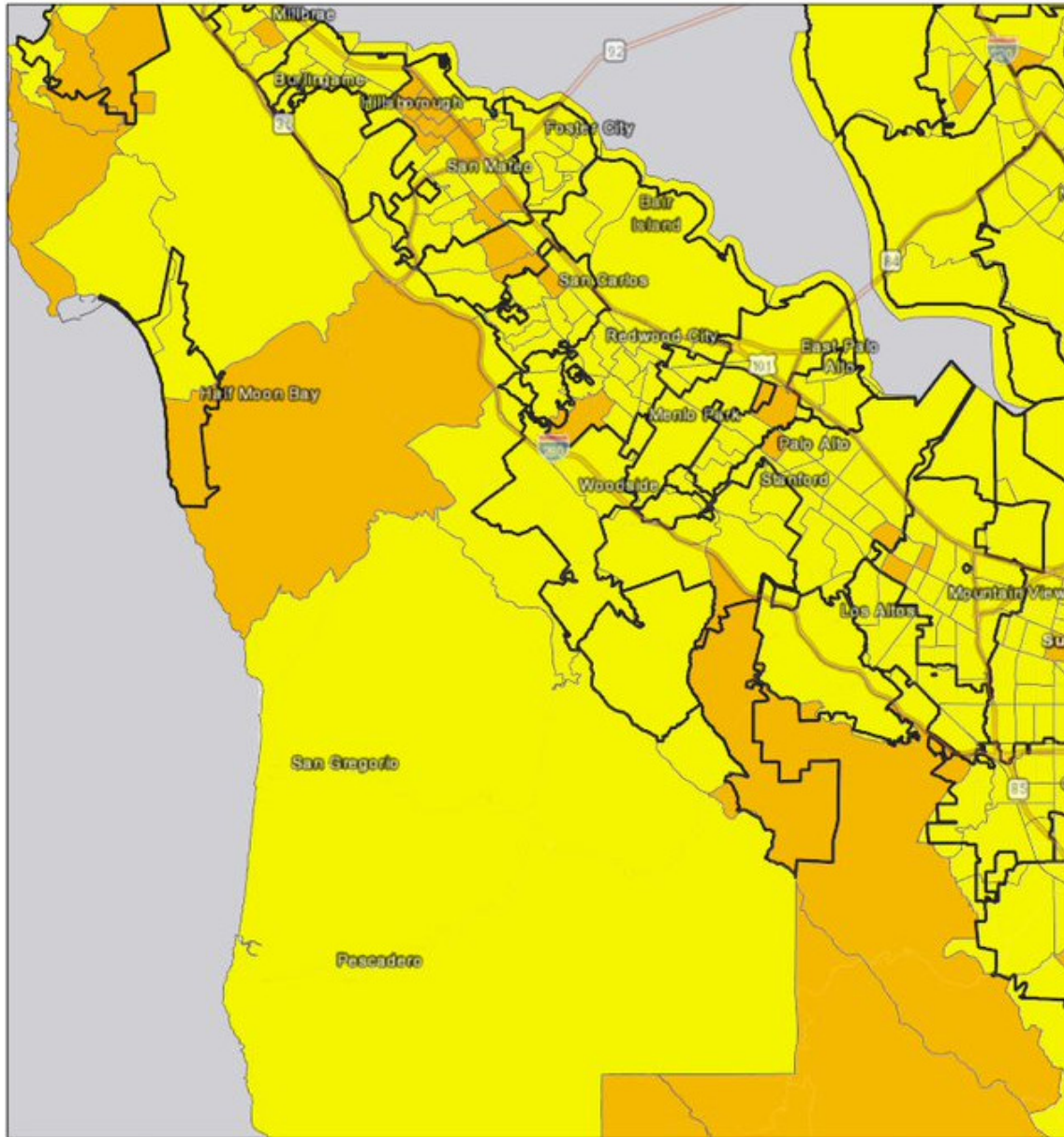
people living with a disability may indicate the area has ample **access to services, amenities, and transportation that support this population.**

FIGURE 31: SHARE OF POPULATION BY DISABILITY STATUS, 2019
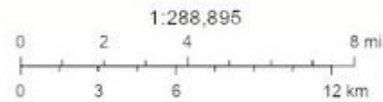
Source: ABAG Housing Needs Data Workbook

Bay Area	90%	10%
San Mateo County	92%	8%
Portola Valley	90%	10%

■ No disability
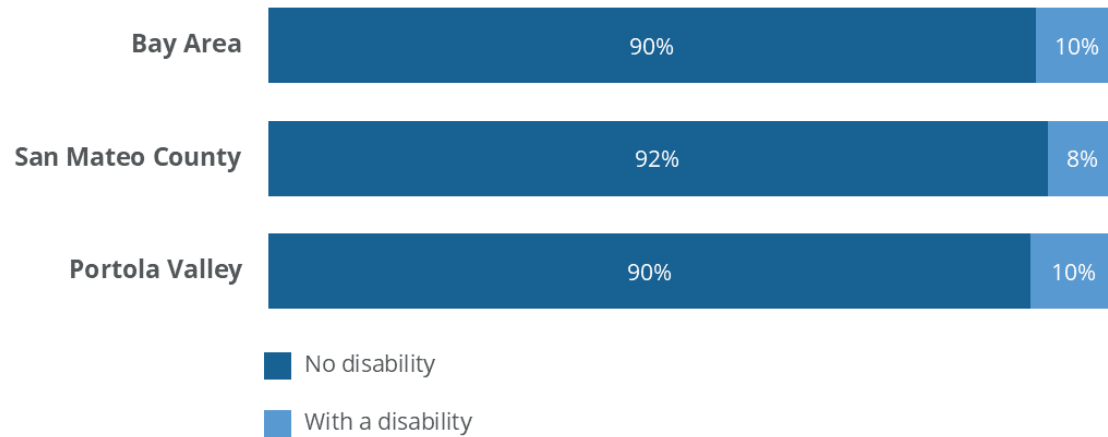
■ With a disability

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□ City/Town Boundaries

(R) Population with a Disability (ACS, 2015 - 2019) - Tract

□ < 10%

□ 10% - 20%

1:288,895

0   2   4   8 mi

0   3   6   12 km

County of San Mateo, California, Bureau of Land Management, Esri, HERE,
Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap
contributors, and the GIS user community

CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021.

FIGURE 32: PERCENT OF POPULATION WITH A DISABILITY BY CENSUS TRACT, 2019

*Source: California Department of Housing and Community Development AFFH Data Viewer*

Familial Status

Portola Valley is home to **more single-person households** than the county, with 25% of households compared to only 22% in the County (see Figure 33). Additionally, there are **more married-couple families in Portola Valley (64%), offset** by fewer single parent households and fewer non-family multiple-person households.
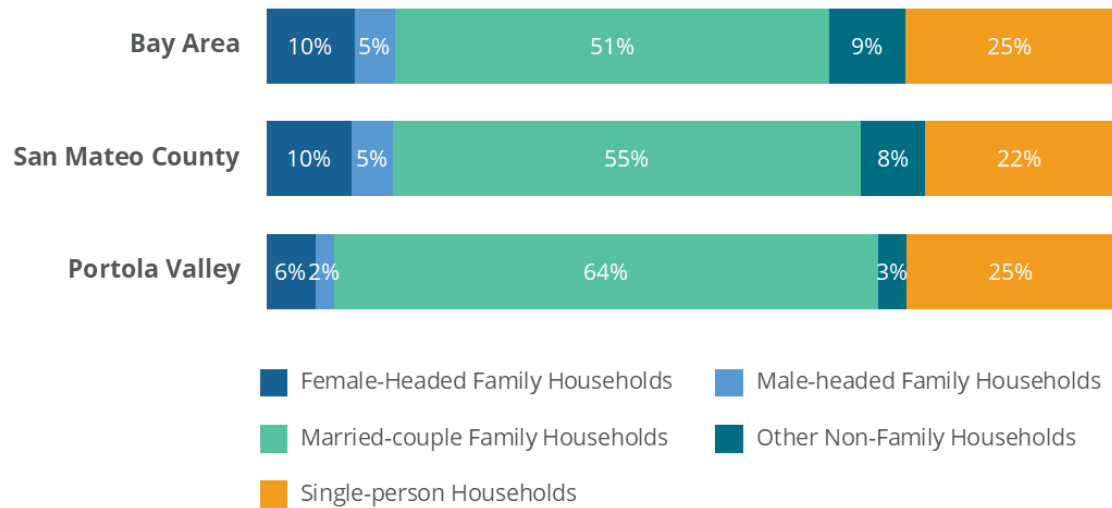
FIGURE 33: SHARE OF HOUSEHOLDS BY TYPE, 2019
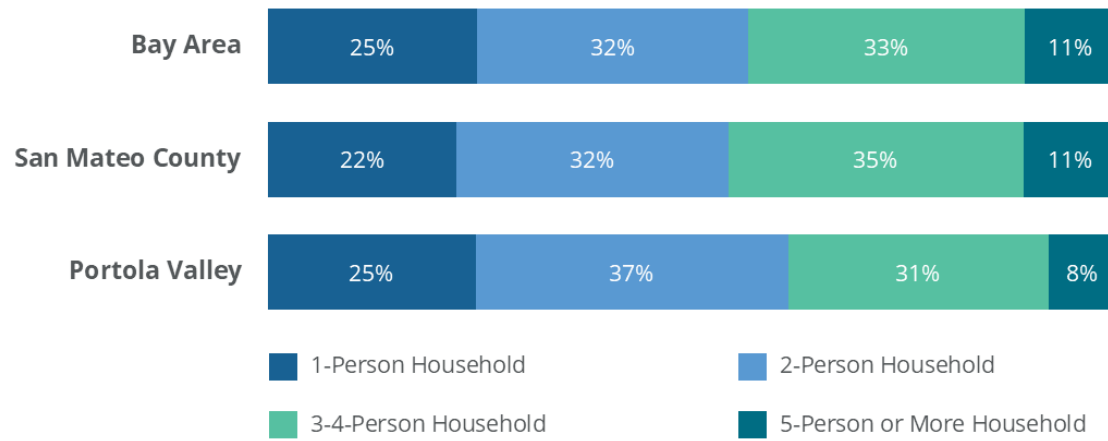
Source: ABAG Housing Needs Data Workbook
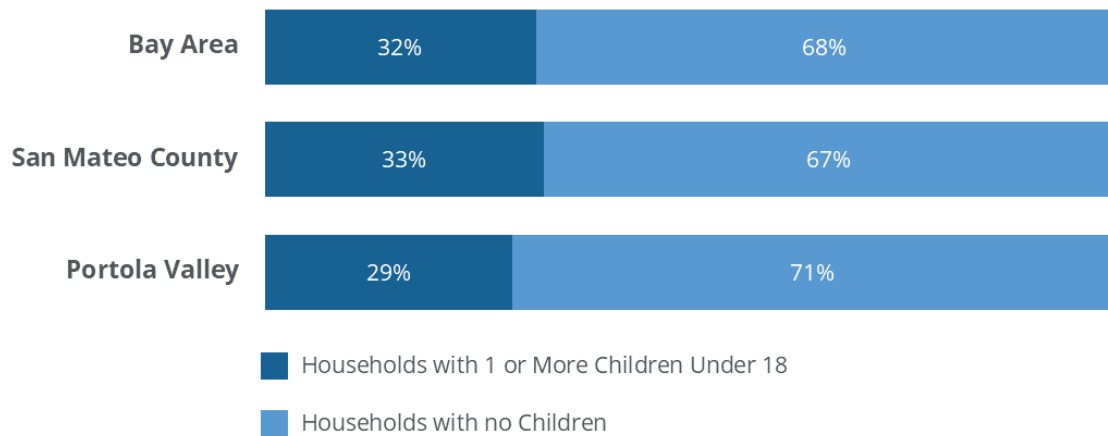
FIGURE 34: SHARE OF HOUSEHOLDS BY PRESENCE OF CHILDREN (LESS THAN 18 YEARS OLD), 2019
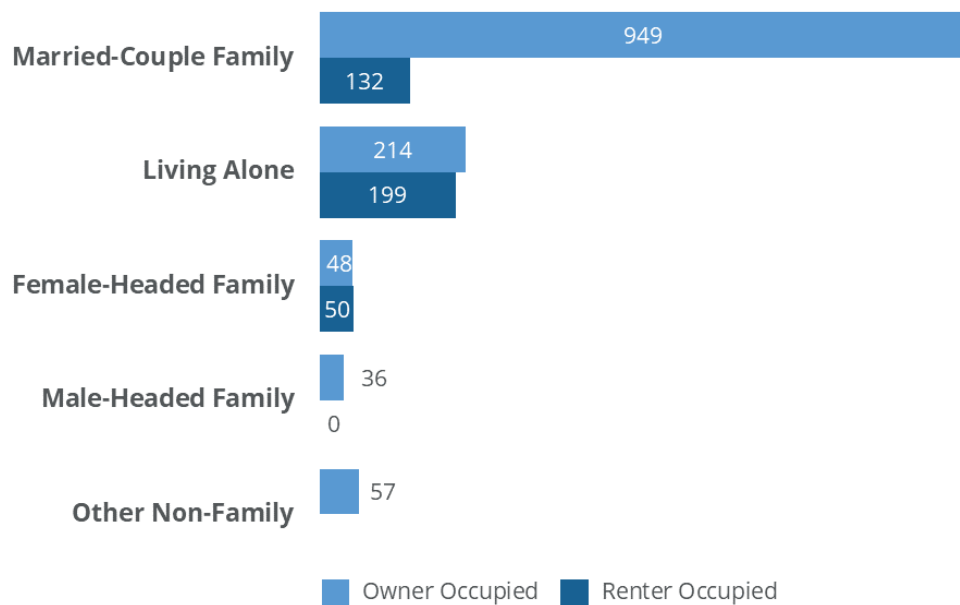
Source: ABAG Housing Needs Data Workbook

Familial status can indicate specific housing needs and preferences. A larger number of nonfamily or single person households indicates a higher share of seniors living alone, young adults living alone or

with roommates, and unmarried partners. Higher shares of nonfamily households indicates an increased need for one and two bedroom units.
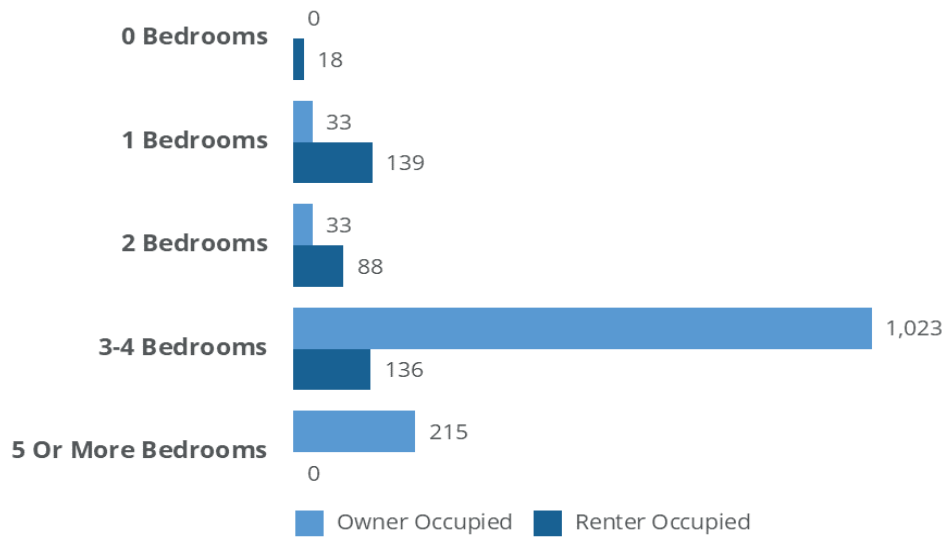

FIGURE 35: SHARE OF HOUSEHOLDS BY SIZE, 2019

Source: ABAG Housing Needs Data Workbook

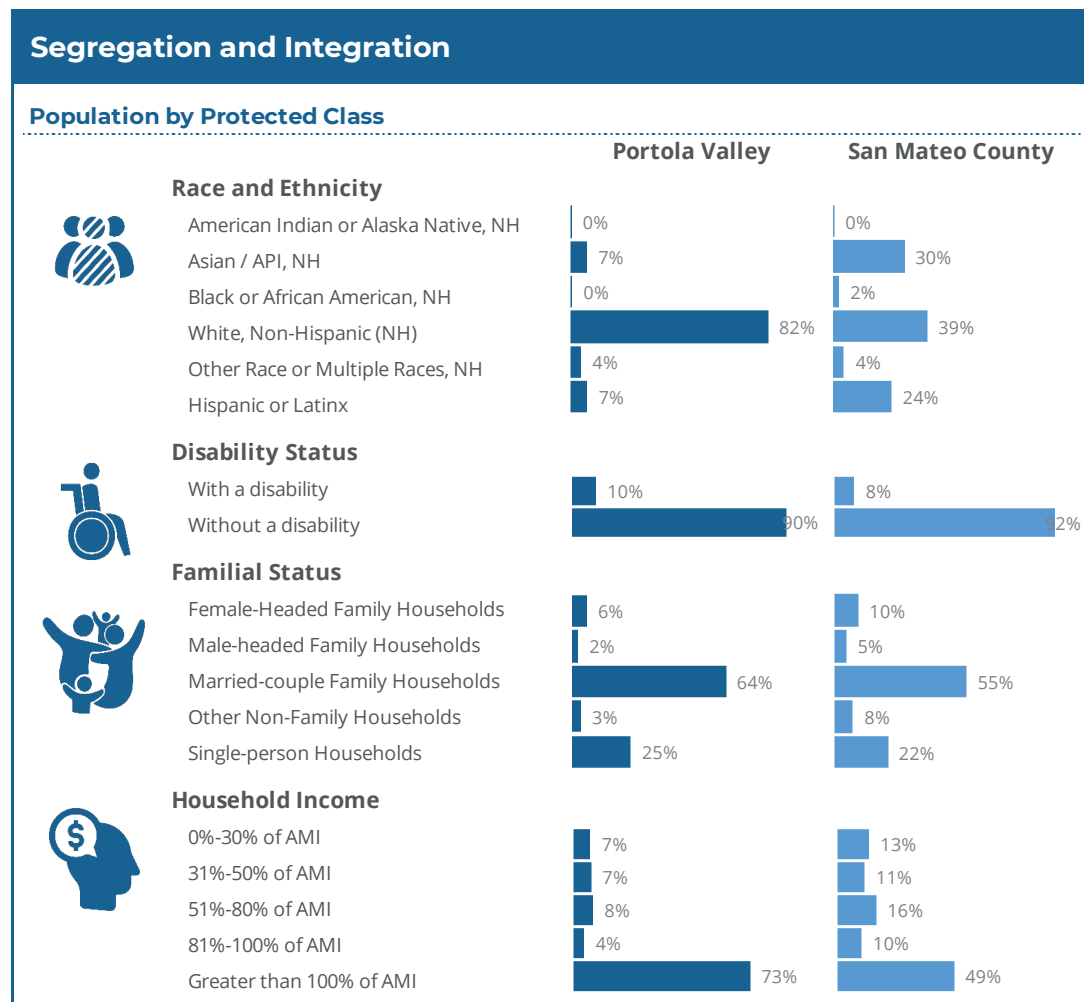**FIGURE 36: HOUSING TYPE BY TENURE, PORTOLA VALLEY, 2019**

Source: ABAG Housing Needs Data Workbook

The vast majority of married couple households live in owner occupied housing; however residents living alone are nearly equally split between renting and owning. **Despite most households being comprised of two people or fewer, most housing units in Portola Valley have 3 to 4 bedrooms (see Figure 37).** This trend is consistent with Portola Valley being an owner-majority, affluent community.

FIGURE 37: HOUSING UNITS BY NUMBER OF BEDROOMS AND TENURE, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

Segregation and Integration

Population by Protected Class

	Portola Valley	San Mateo County
Race and Ethnicity		
American Indian or Alaska Native, NH	0%	0%
Asian / API, NH	7%	30%
Black or African American, NH	0%	2%
White, Non-Hispanic (NH)	82%	39%
Other Race or Multiple Races, NH	4%	4%
Hispanic or Latinx	7%	24%
Disability Status		
With a disability	10%	8%
Without a disability	90%	92%
Familial Status		
Female-Headed Family Households	6%	10%
Male-headed Family Households	2%	5%
Married-couple Family Households	64%	55%
Other Non-Family Households	3%	8%
Single-person Households	25%	22%
Household Income		
0%-30% of AMI	7%	13%
31%-50% of AMI	7%	11%
51%-80% of AMI	8%	16%
81%-100% of AMI	4%	10%
Greater than 100% of AMI	73%	49%

Racially or Ethnically Concentrated Areas of Poverty and Affluence

Racially Concentrated Area of Poverty or an Ethnically Concentrated Area of Poverty (R/ECAP) and Racially Concentrated Areas of Affluence (RCAAs) represent opposing ends of the segregation spectrum from racially or ethnically segregated areas with high poverty rates to affluent predominantly White neighborhoods. Historically, HUD has paid particular attention to R/ECAPs as a focus of policy and obligations to AFFH. Recent research out of the University of Minnesota Humphrey School of Public Affairs argues for the inclusion of RCAAs to acknowledge current and past policies that created and perpetuate these areas of high opportunity and exclusion.[18]

It is important to note that R/ECAPs and RCAAs are not areas of focus because of racial and ethnic concentrations alone. This study recognizes that racial and ethnic clusters can be a part of fair housing choice if they occur in a non-discriminatory market. Rather, R/ECAPs are meant to identify areas where residents may have historically faced discrimination and continue to be challenged by limited economic opportunity, and conversely, RCAAs are meant to identify areas of particular advantage and exclusion.

R/ECAPs

HCD and HUD's definition of a Racially/Ethnically Concentrated Area of Poverty is:

- A census tract that has a non-White population of 50 percent or more (majority-minority) or, for non-urban areas, 20 percent, AND a poverty rate of 40 percent or more; OR

- A census tract that has a non-white population of 50 percent or more (majority-minority) AND the poverty rate is three times the average tract poverty rate for the County, whichever is lower.


Source: California Department of Housing and Community Development Guidance, 2021.

For this study, the poverty threshold used to qualify a tract as an R/ECAP was three times the average census tract poverty rate countywide—or 19.1%. In addition to R/ECAPs that meet the HUD threshold, this study includes edge or emerging R/ECAPs which hit two thirds of the HUD defined threshold for poverty—emerging R/ECAPs in San Mateo County have two times the average tract poverty rate for the county (12.8%).

In 2010 there were three census tracts that qualify as R/ECAPs (19.4% poverty rate) in the county and 11 that qualify as edge R/ECAPs (13% poverty rate). None of the R/ECAPs were located in Portola Valley in 2010.

In 2019 there were two census tracts that qualify as R/ECAPs (19.1% poverty rate) in the county and 14 that qualify as edge R/ECAPs (12.8% poverty rate)—which means they are majority minority and have a poverty rate two times higher than the countywide census tract average. **None of the R/ECAPs or edge R/ECAPs are located in Portola Valley.**

---

[18] Goetz, E. G., Damiano, A., & Williams, R. A. (2019). Racially Concentrated Areas of Affluence: A Preliminary Investigation. Cityscape: A Journal of Policy Development and Research, 21(1), 99–124
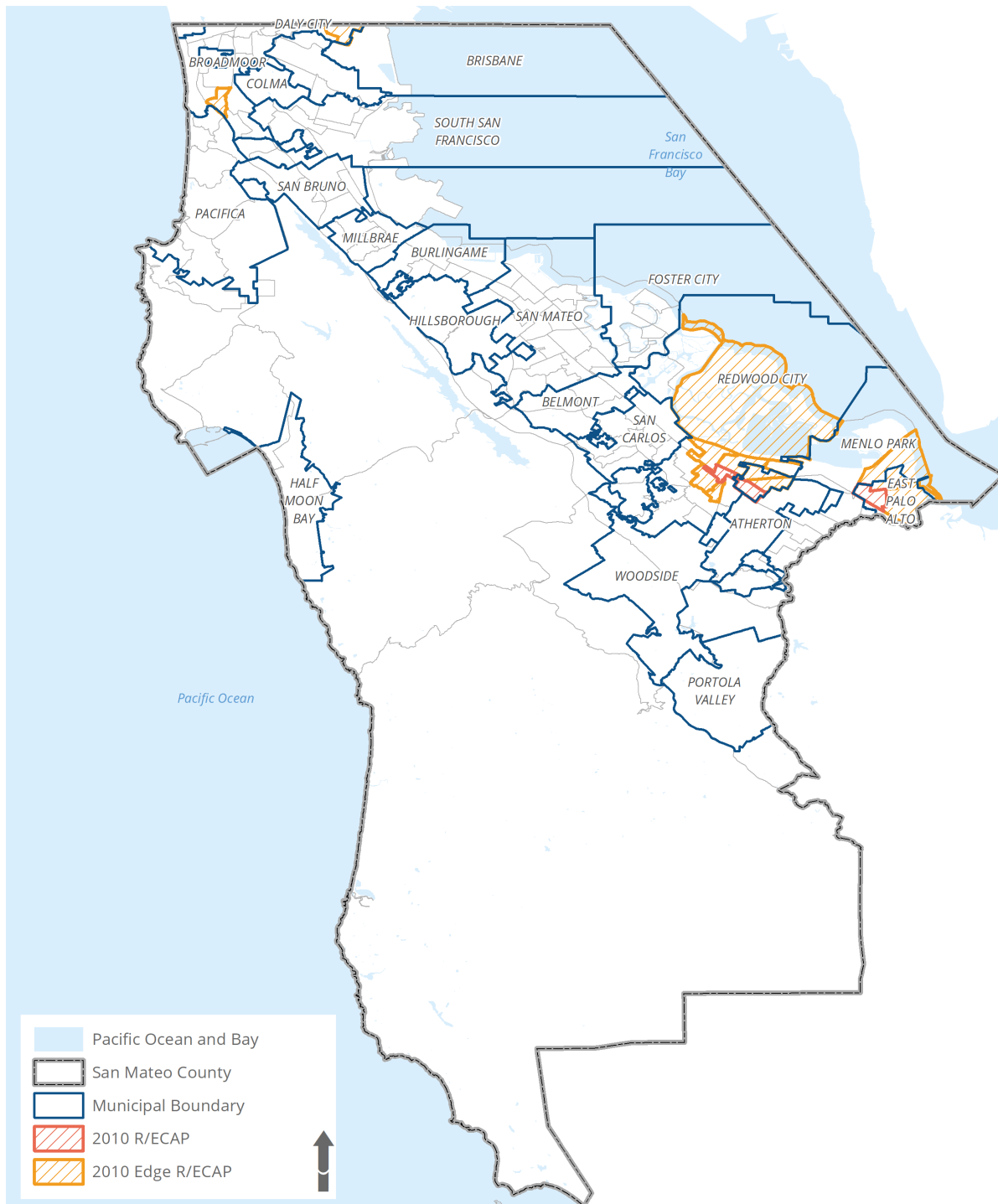
FIGURE 38: R/ECAPs AND EDGE R/ECAPs, 2010

Note: R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is three times the average tract poverty rate for the County (19.4% in 2010). Edge R/ECAPs are census tracts that have a non-white population of 50 percent or more (majority-minority) AND the poverty rate is two times the average tract poverty rate for the County (13% in 2010).
Source: California Department of Housing and Community Development AFFH Data Viewer.

5. ACCESS TO OPPORTUNITY

This section discusses disparities in access to opportunity among protected classes including access to quality education, employment, transportation, and environment.

ACCESS TO OPPORTUNITY

"**Access to opportunity** is a concept to approximate place-based characteristics linked to critical life outcomes. Access to opportunity oftentimes means both improving the quality of life for residents of low-income communities, as well as supporting mobility and access to 'high resource' neighborhoods. This encompasses education, employment, economic development, safe and decent housing, low rates of violent crime, transportation, and other opportunities, including recreation, food and healthy environment (air, water, safe neighborhood, safety from environmental hazards, social services, and cultural institutions)."

Source: California Department of Housing and Community Development Guidance, 2021, page 34.

The California Tax Credit Allocation Committee (TCAC) in collaboration with HCD developed a series of opportunity maps that help to identify areas of the community with good or poor access to opportunity for residents. These maps were developed to align funding allocations with the goal of improving outcomes for low-income residents—particularly children.

The opportunity maps highlight areas of highest resource, high resource, moderate resource, moderate resource (rapidly changing), low resource and high segregation and poverty. TCAC provides opportunity maps for access to opportunity in quality education, employment, transportation, and environment. Opportunity scores are presented on a scale from zero to one and the higher the number, the more positive the outcomes.

5.1 EDUCATION

TCAC's education score is based on math proficiency, reading proficiency, high school graduation rates, and the student poverty rate. According to TCAC's educational opportunity map, the entirety of Portola Valley has a very high education outcome (index value over 0.75)—opportunity scores are presented on a scale from zero to one and the higher the number, the more positive the outcomes.

Portola Valley is served by the Sequoia Union High School District and the Portola Valley Elementary School District. Sequoia Union increased enrollment by 18% from 2010 to 2020 but the **elementary district enrollment decreased by 30%** over the same time. Both districts lost students during the COVID pandemic.

Portola Valley Elementary School District (66%) and Woodside Elementary School District (64%) had the highest share of White students, making them **among the least racially and ethnically diverse districts in the county.** Portola Valley has the least diverse faculty and staff in the county, with 59% identifying as White.

Overall, 29% of public school students in San Mateo County qualify for reduced or free lunch. This rate was substantially lower in districts like Hillsborough Elementary, San Carlos Elementary, Portola Valley Elementary, Las Lomitas Elementary, Belmont-Redwood Shores, and Menlo Park City Elementary,

where each had less than 10% of students qualify for free or reduced lunch. This means that these districts serve very few low-income students.

Many high schoolers in the county met admission standards for a University of California (UC) or California State University (CSU) school. Of the high school districts in San Mateo County, Sequoia Union had the highest rate of graduates who met such admission standards at 69% followed by San Mateo Union High with 68%. **Pacific Islander, Black, and Hispanic students in the Sequoia Union district were substantially less likely to meet the admission standards,** with rates of 38%, 50%, and 55% respectively.

Overall, Sequoia Union High School has one of the highest dropout rates—10% of students—compared to other districts in the county. Still, **dropout rates among Hispanic (16%), Black (12%), and Pacific Islander (20%) students are even higher.**
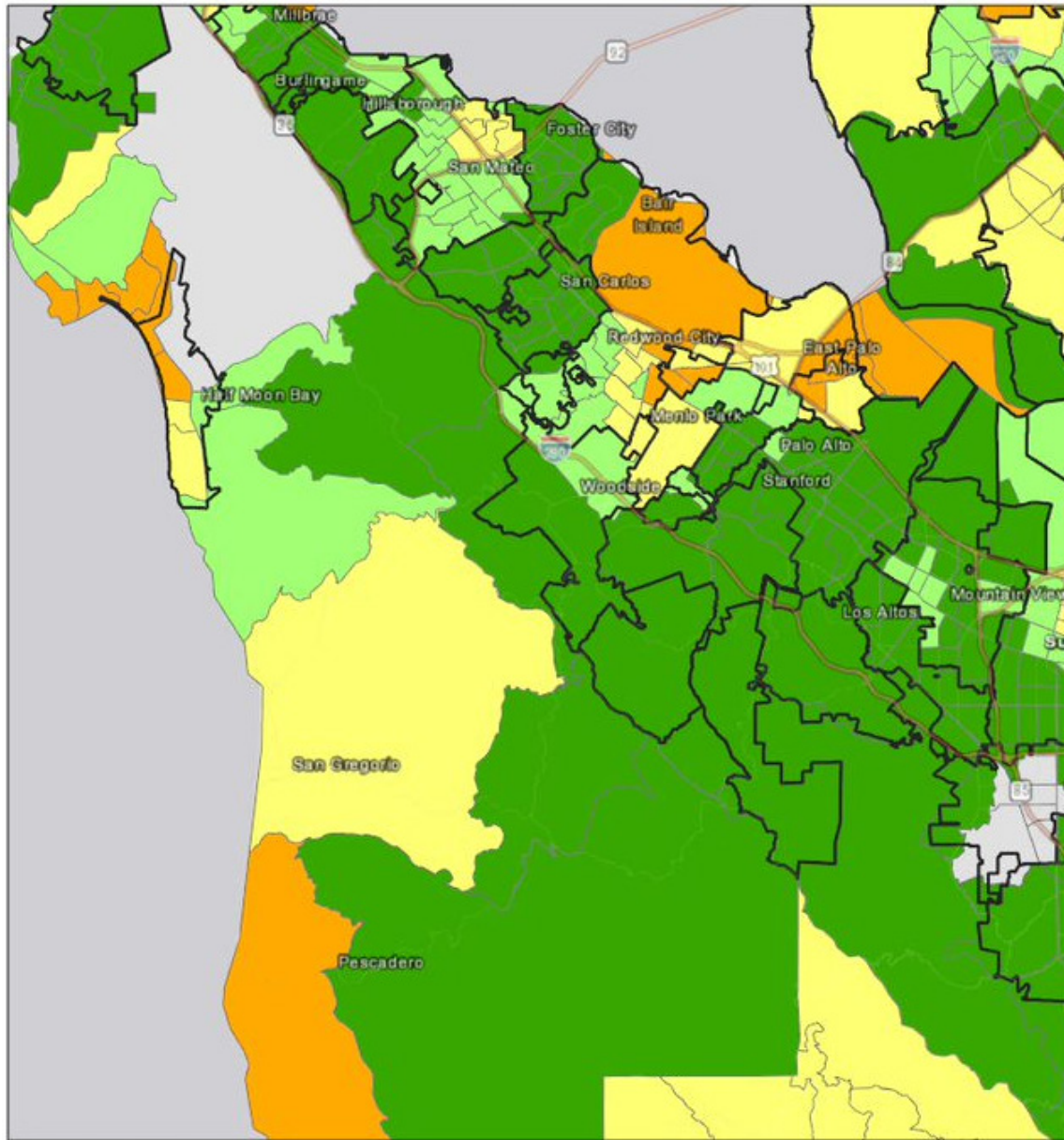
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City/Town Boundaries

(R) TCAC Opportunity Areas (2021) - Education Score -Tract

< 0.25 (Less Positive Education Outcomes)

0.25 - 0.50

0.50 - 0.75

> 0.75 (More Positive Education Outcomes)

No Data
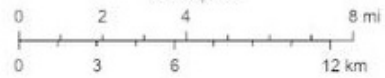
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County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap contributors, and the GIS user community

CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021.

FIGURE 39: TCAC OPPORTUNITY AREAS EDUCATION SCORE BY CENSUS TRACT, 2021

Source: California Department of Housing and Community Development AFFH Data Viewer

5.2 EMPLOYMENT

The top three industries by number of jobs in Portola Valley include **health and educational services, professional and managerial services, and arts and recreation services.**
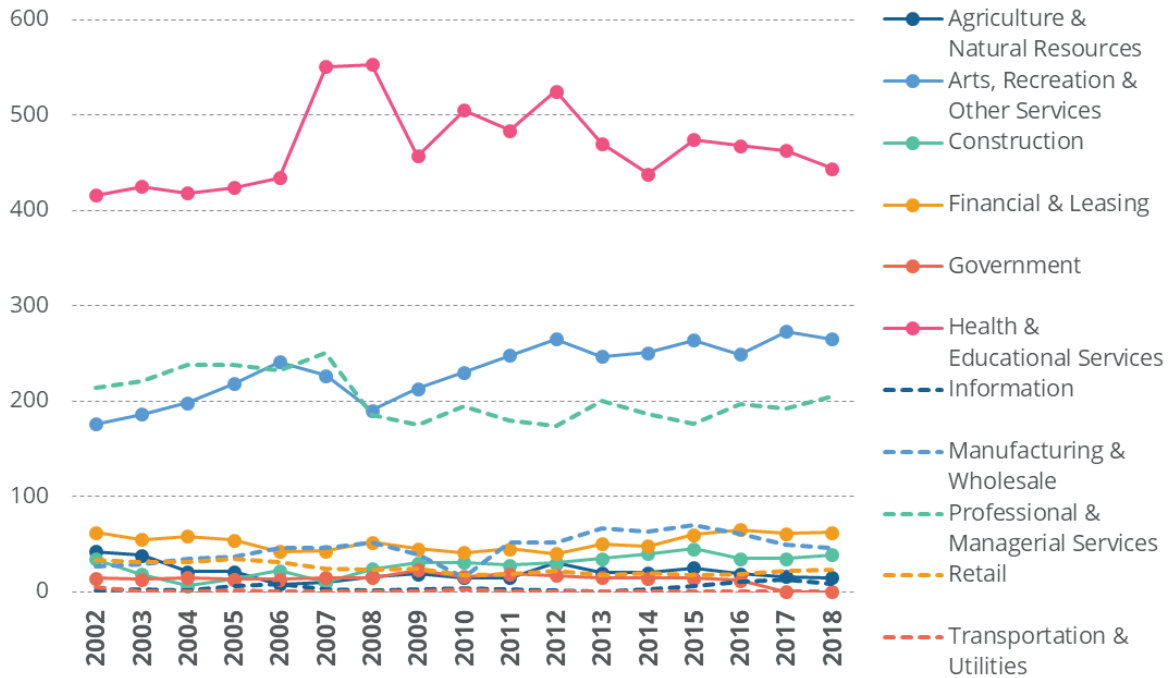
FIGURE 40: JOBS BY INDUSTRY, PORTOLA VALLEY, 2002-2018

Source: *ABAG Housing Needs Data Workbook*
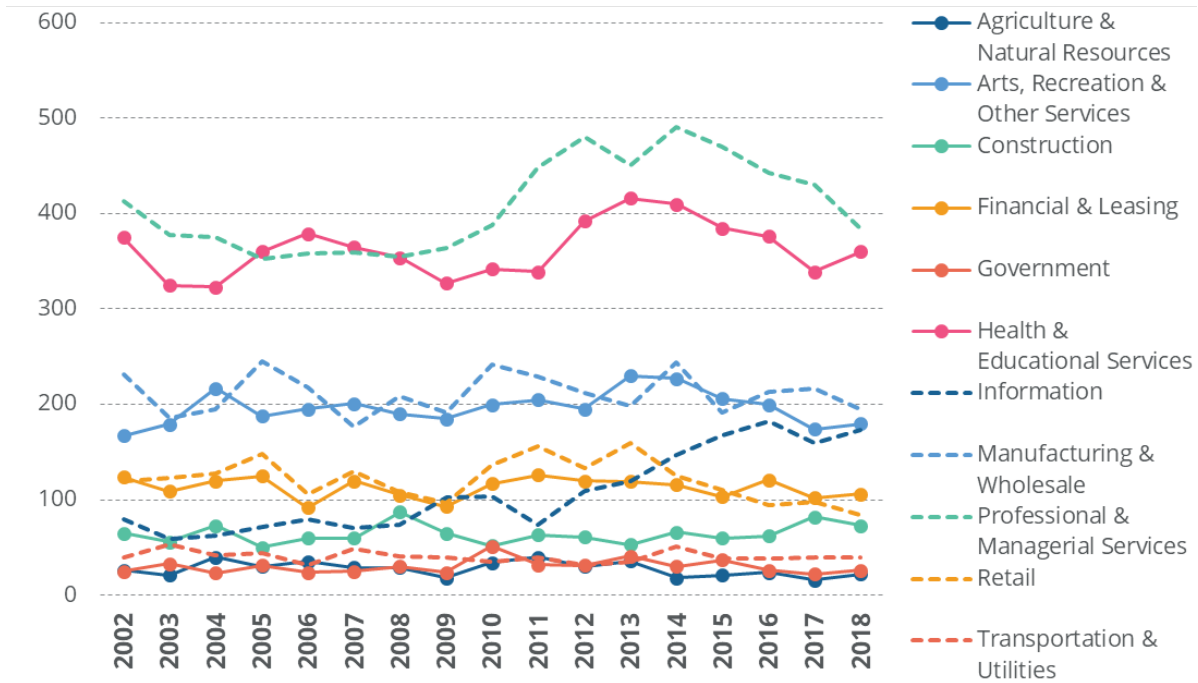
FIGURE 41: JOB HOLDERS BY INDUSTRY, PORTOLA VALLEY, 2002-2018

Source: ABAG Housing Needs Data Workbook

The Town has a much lower job-to-household ratio when compared to the county at 0.63 and 1.59 respectively—which means there are fewer employment opportunities per household in Portola Valley. This trend, combined with low unemployment, indicates high out-commuting and/or retired households.
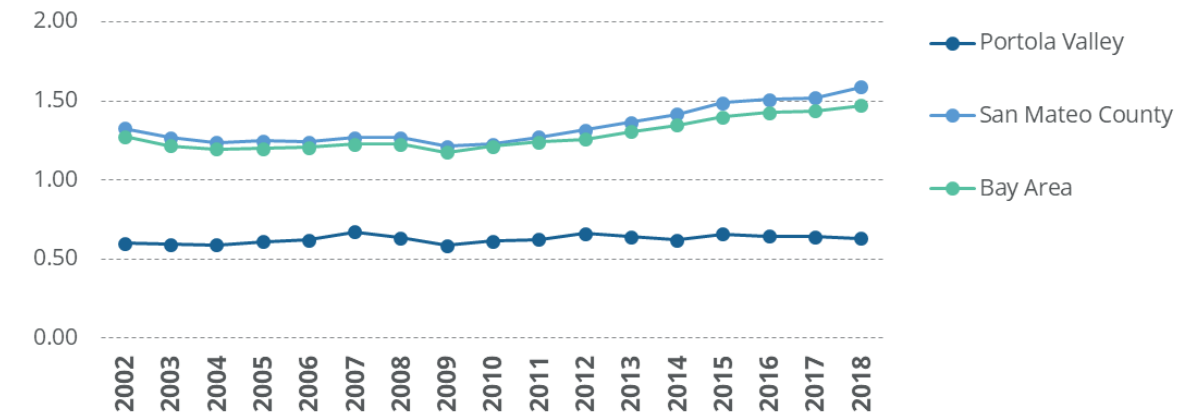
FIGURE 42: JOBS TO HOUSEHOLD RATIO, PORTOLA VALLEY, 2002-2018

Source: ABAG Housing Needs Data Workbook

HUD's job proximity index shows Portola Valley to have a **moderate proximity to jobs.** On a scale from zero to 100 where 100 is the closest proximity to jobs, block groups within the town score between 40 and 80.
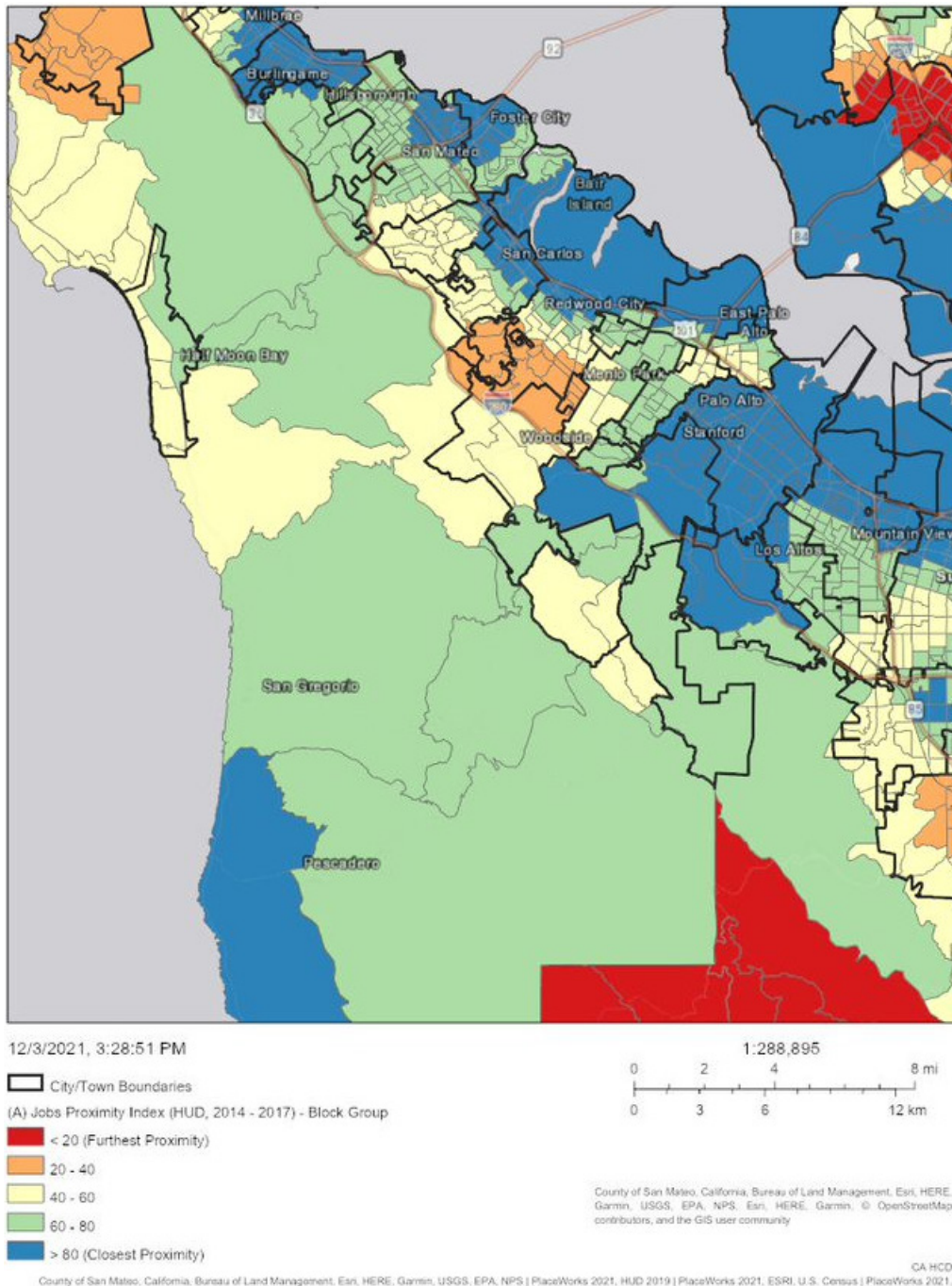
FIGURE 43: JOBS PROXIMITY INDEX BY BLOCK GROUP, 2017

Source: California Department of Housing and Community Development AFFH Data Viewer

5.3 TRANSPORTATION

This section provides a summary of the transportation system that serves the broader region including emerging trends and data relevant to transportation access in the town. The San Mateo County Transit District acts as the administrative body for transit and transportation programs in the county including SamTrans and the Caltrain commuter rail. SamTrans provides bus services in San Mateo County, including Redi-Wheels paratransit service.

In 2018, the Metropolitan Transportation Commission (MTC), which covers the entire Bay Area, adopted a coordinated public transit and human services transportation plan. While developing the coordinated plan, the MTC conducted extensive community outreach about transportation within the area. That plan—which was developed by assessing the effectiveness of how well seniors, persons with disabilities, veterans, and people with low incomes are served—was reviewed to determine gaps in services in Portola Valley and the county overall. Below is a summary of comments relevant to San Mateo County; no comments specific to Portola Valley were included in the report.

> *"San Mateo's [Paratransit Coordinating Council] PCC and County Health System, as well as the Peninsula Family Service Agency provided feedback. The most common themes expressed had to do with pedestrian and bicycle needs at specific locations throughout the county, though some covered more general comments such as parked cars blocking sidewalk right-of-way and a desire for bike lanes to accommodate motorized scooters and wheelchairs. Transportation information, emerging mobility providers, and transit fares were other common themes.*
>
> *While some comments related to the use of car share, transportation network companies (TNCs), or autonomous vehicles as potential solutions, other comments called for the increased accessibility and affordability of these services in the meantime."[19]*

A partnership between the World Institute on Disability and the MTC created the research and community engagement project TRACS (Transportation Resilience, Accessibility & Climate Sustainability). The project's overall goal is to, "stimulate connection and communication between the community of seniors and people with disabilities together with the transportation system– the agencies in the region local to the San Francisco bay, served by MTC."[20]

As part of the TRACS outreach process, respondents were asked to share their compliments or good experiences with MTC transit. One respondent who had used multiple services said, **"it is my sense that SamTrans is the best Bay Area transit provider in terms of overall disability accommodation."**

The San Mateo County Transit District updated their Mobility Plan for Older Adults and People with Disabilities in 2018. According to the district, the **county's senior population is expected to grow more than 70% over the next 20 years and the district is experiencing unprecedented increases in paratransit ridership.** The plan is targeted at developing effective mobility programs for residents

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[19] https://mtc.ca.gov/sites/default/files/MTC_Coordinated_Plan.pdf
[20] https://wid.org/transportation-accessibility/

with disabilities and older adults including viable alternatives to paratransit, partnerships, and leveraging funding sources.[21]

MTC also launched Clipper START—an 18-month pilot project— in 2020 which provides fare discounts on single transit rides for riders whose household income is no more than double the federal poverty level.[22]

5.4 ENVIRONMENT

TCAC's opportunity areas environmental scores are based on the CalEnviroScreen 3.0 indicators, which identify areas disproportionately vulnerable to pollution sources such as ozone, $PM_{2.5}$, diesel PM, pesticides, toxic release, traffic, cleanup sites, groundwater threats, hazardous waste, impaired water bodies, and solid waste sites.

Portola Valley **scores moderate to poorly on environmental outcomes** (0.25-0.5) though this score is similar to surrounding communities which have similar—or in some cases lower—scores. However, the **town scores relatively high compared to other areas of San Mateo County on the California Healthy Places Index (HPI)** developed by the Public Health Alliance of Southern California (PHASC). The HPI includes 25 community characteristics in eight categories including economic, social, education, transportation, neighborhood, housing, clean environment, and healthcare.[23]

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[21] https://www.samtrans.com/Planning/Planning_and_Research/Mobility_Plan_for_Older_Adults_and_People_with_Disabilities.html

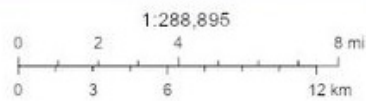[22] https://mtc.ca.gov/planning/transportation/access-equity-mobility/clipperr-startsm

[23] https://healthyplacesindex.org/about/

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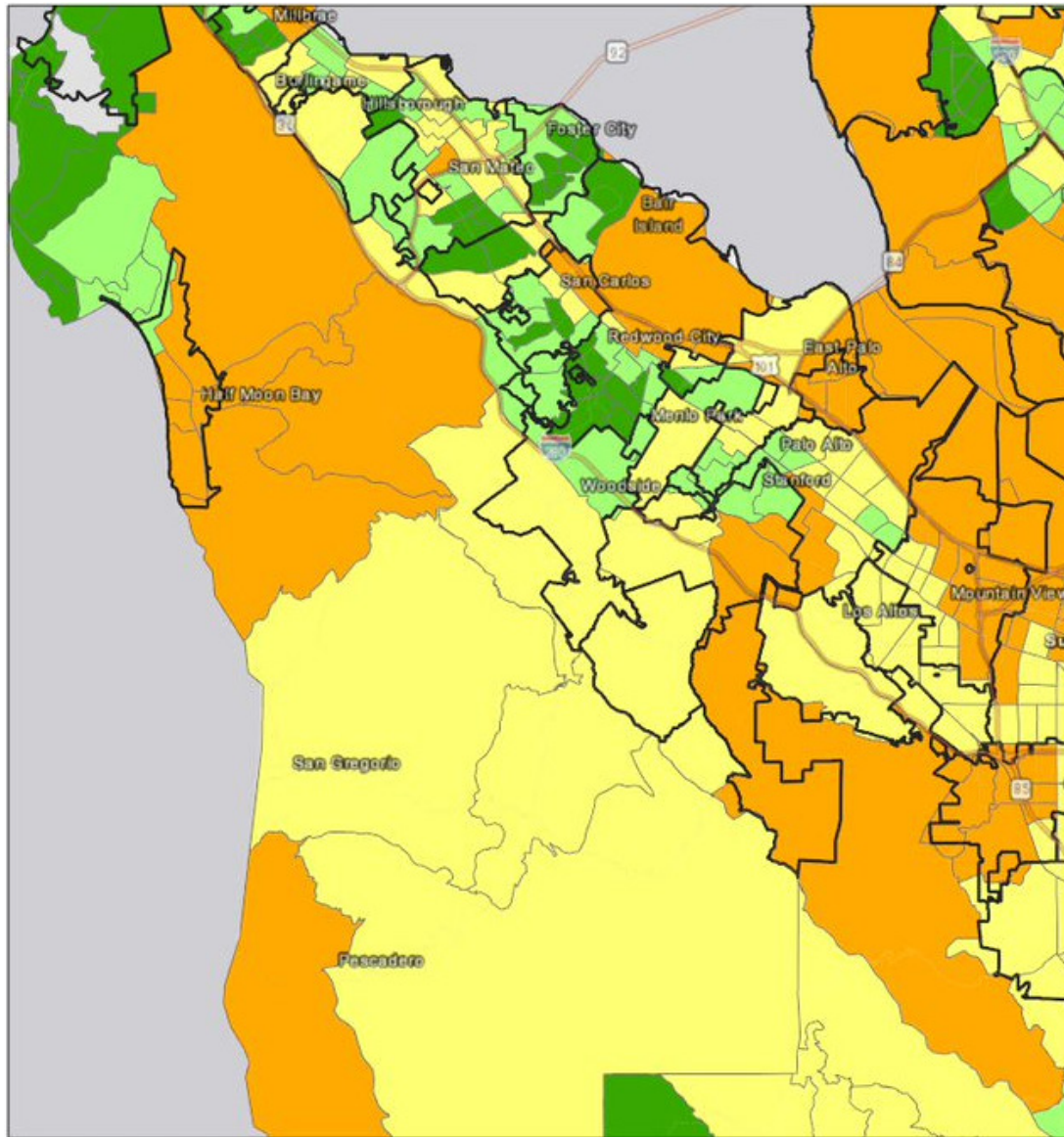
City/Town Boundaries

(R) TCAC Opportunity Areas (2021) - Environmental Score -Tract

< .25 (Less Positive Environmental Outcomes)

.25 - .50

.50 - .75

.75 - 1 (More Positive Environmental Outcomes)

No Data

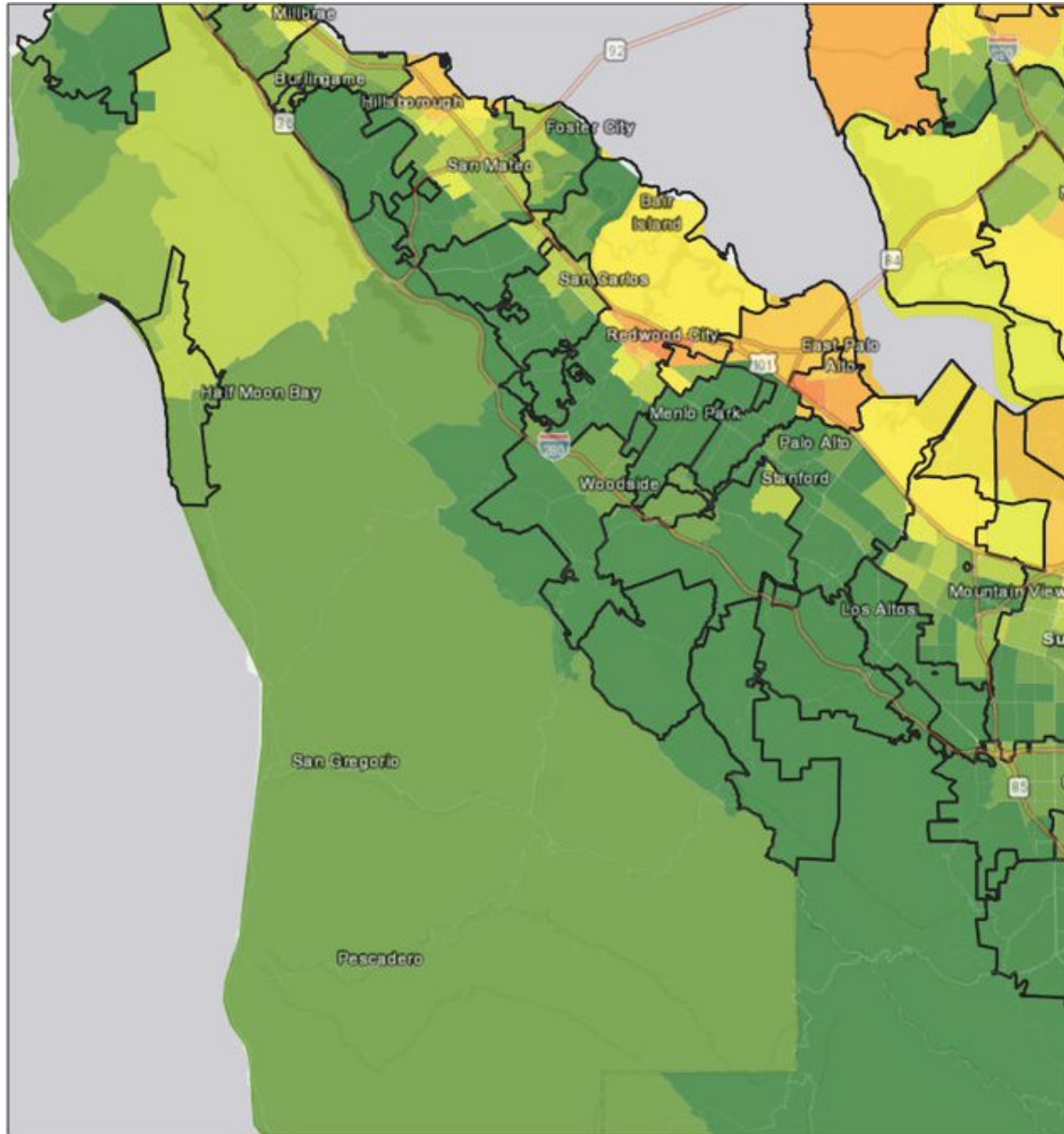0   2   4   8 mi

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County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap contributors, and the GIS user community
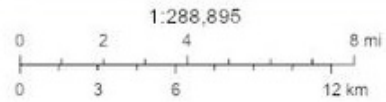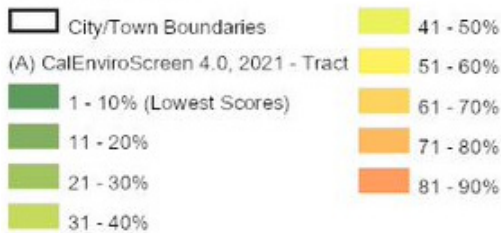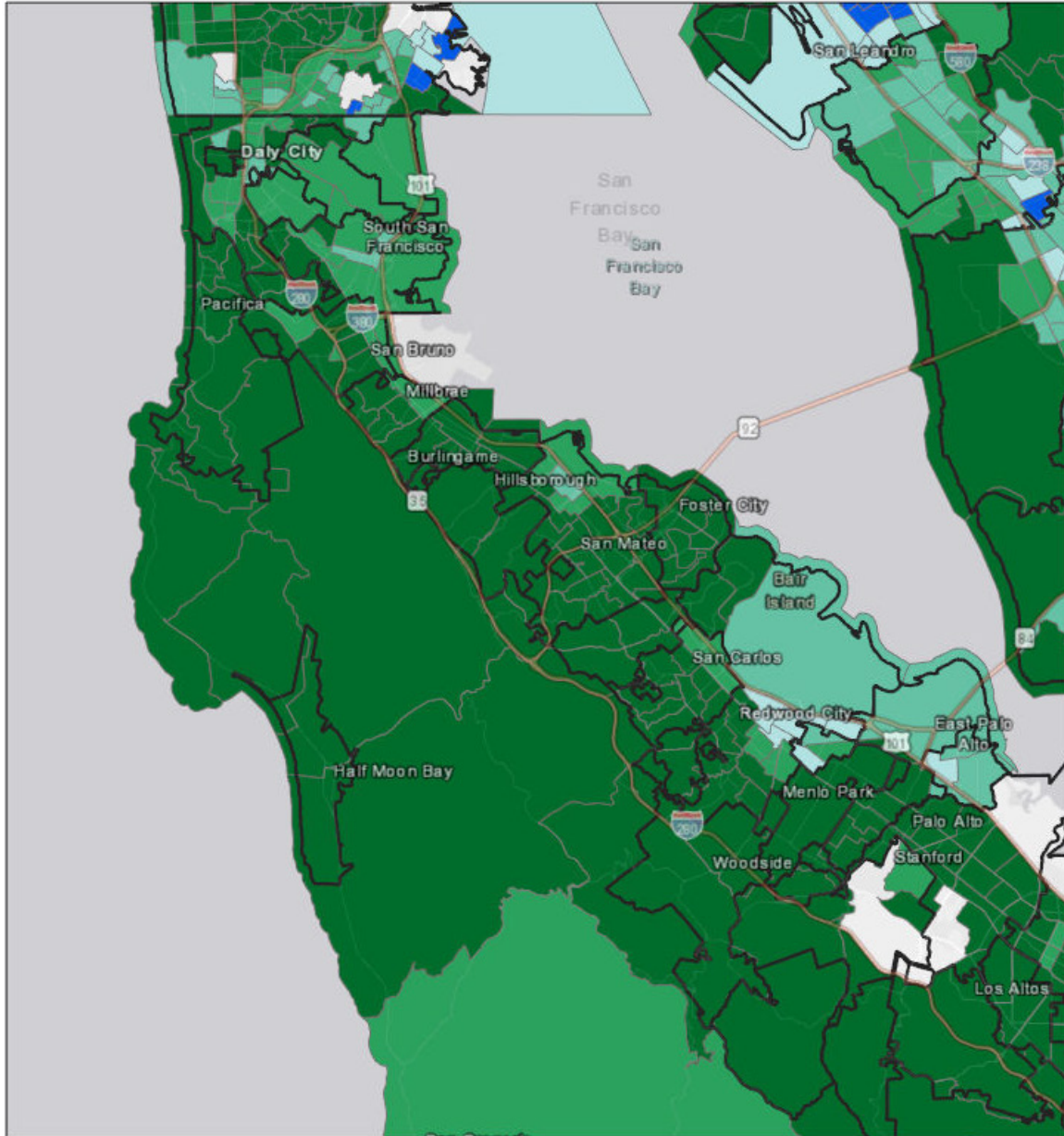
CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021.

FIGURE 44: TCAC OPPORTUNITY AREAS ENVIRONMENTAL SCORE BY CENSUS TRACT, 2021

Source: California Department of Housing and Community Development AFFH Data Viewer

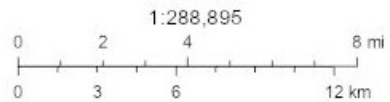**FIGURE 45: CALENVIROSCREEN BY CENSUS TRACT, 2021**

Source: California Department of Housing and Community Development AFFH Data Viewer

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☐ City/Town Boundaries

(A) Healthy Places Index (PHASC, 2021) - Tract

▨ < 20%

▨ 20% - 40%

▨ 40% - 60%

▨ 60% - 80%

▨ 80% - 100%

1:288,895

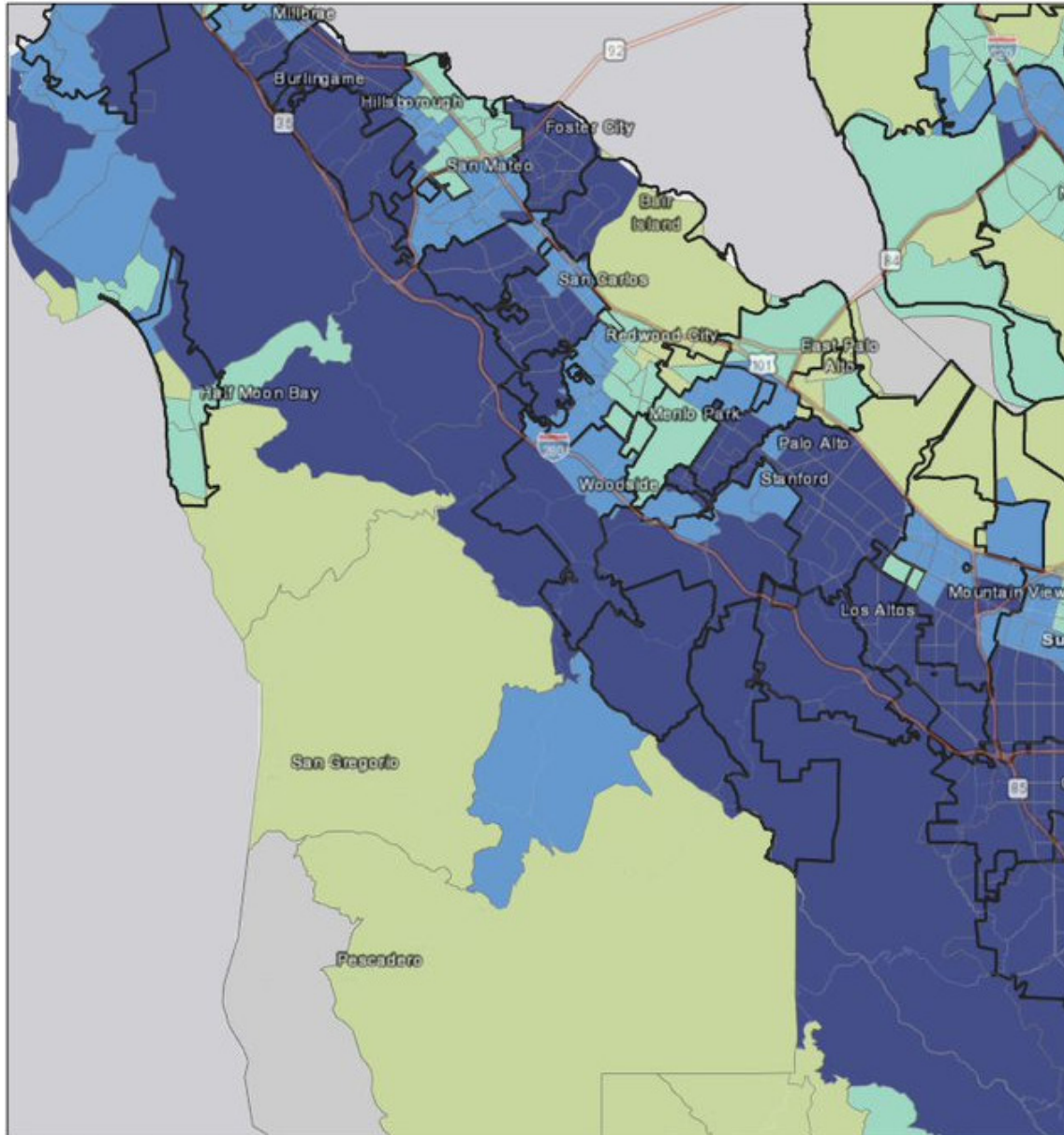0   2   4   8 mi

0   3   6   12 km

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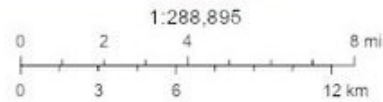
FIGURE 46: HEALTHY PLACES INDEX BY CENSUS TRACT, 2021

Source: California Department of Housing and Community Development AFFH Data Viewer

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City/Town Boundaries

(R) TCAC Opportunity Areas (2021) - Composite Score - Tract

- Highest Resource
- High Resource
- Moderate Resource (Rapidly Changing)
- Moderate Resource
- Low Resource

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CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021,

FIGURE 47: TCAC OPPORTUNITY AREAS COMPOSITE SCORE BY CENSUS TRACT, 2021

Source: California Department of Housing and Community Development AFFH Data Viewer

5.5   DISPARITIES IN ACCESS TO OPPORTUNITY

Countywide data show that racial and ethnic minorities are more likely to live in moderate resource areas compared to non-Hispanic White residents. All of Portola Valley is considered a "highest resource" area so racial/ethnic disparities are not evident within the community. However, the limited racial/ethnic diversity of Portola Valley may contribute to the countywide disparities in access to opportunity by race/ethnicity.
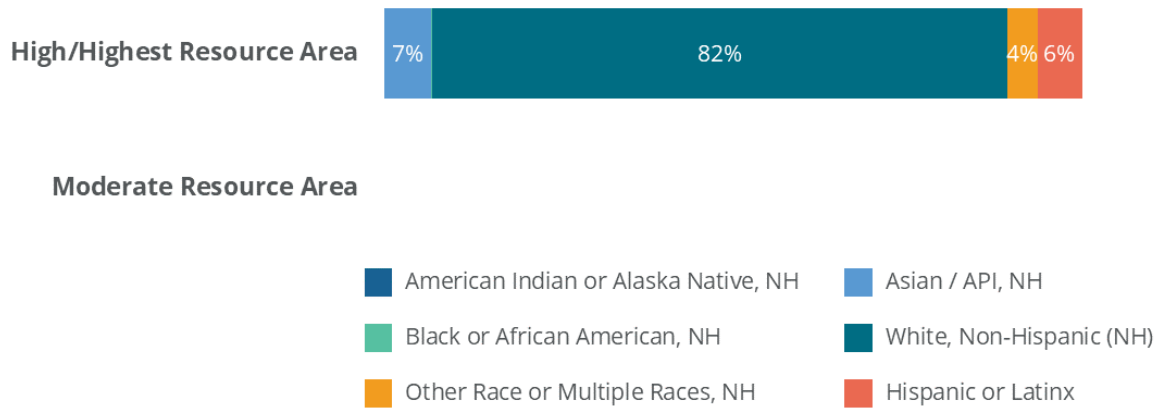

FIGURE 48: POPULATION LIVING IN MODERATE AND HIGH RESOURCE ARES BY RACE AND ETHNICITY, PORTOLA VALLEY, 2019

Note: All of Portola Valley is considered a High Resource Area
Source: ABAG Housing Needs Data Workbook

The Social Vulnerability Index (SVI) provided by the Center for Disease Control (CDC)—ranks census tracts based on their ability to respond to a disaster—includes four themes of socioeconomic status, household composition, race or ethnicity, and housing and transportation. Again, **Portola Valley is considered a "low vulnerability" area.**

Portola Valley does not have any disadvantaged communities as defined under SB 535 as, "the top 25% scoring areas from CalEnviroScreen along with other areas with high amounts of pollution and low populations."[24]
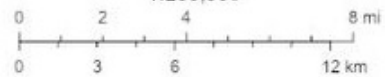
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[24] https://oehha.ca.gov/calenviroscreen/sb535
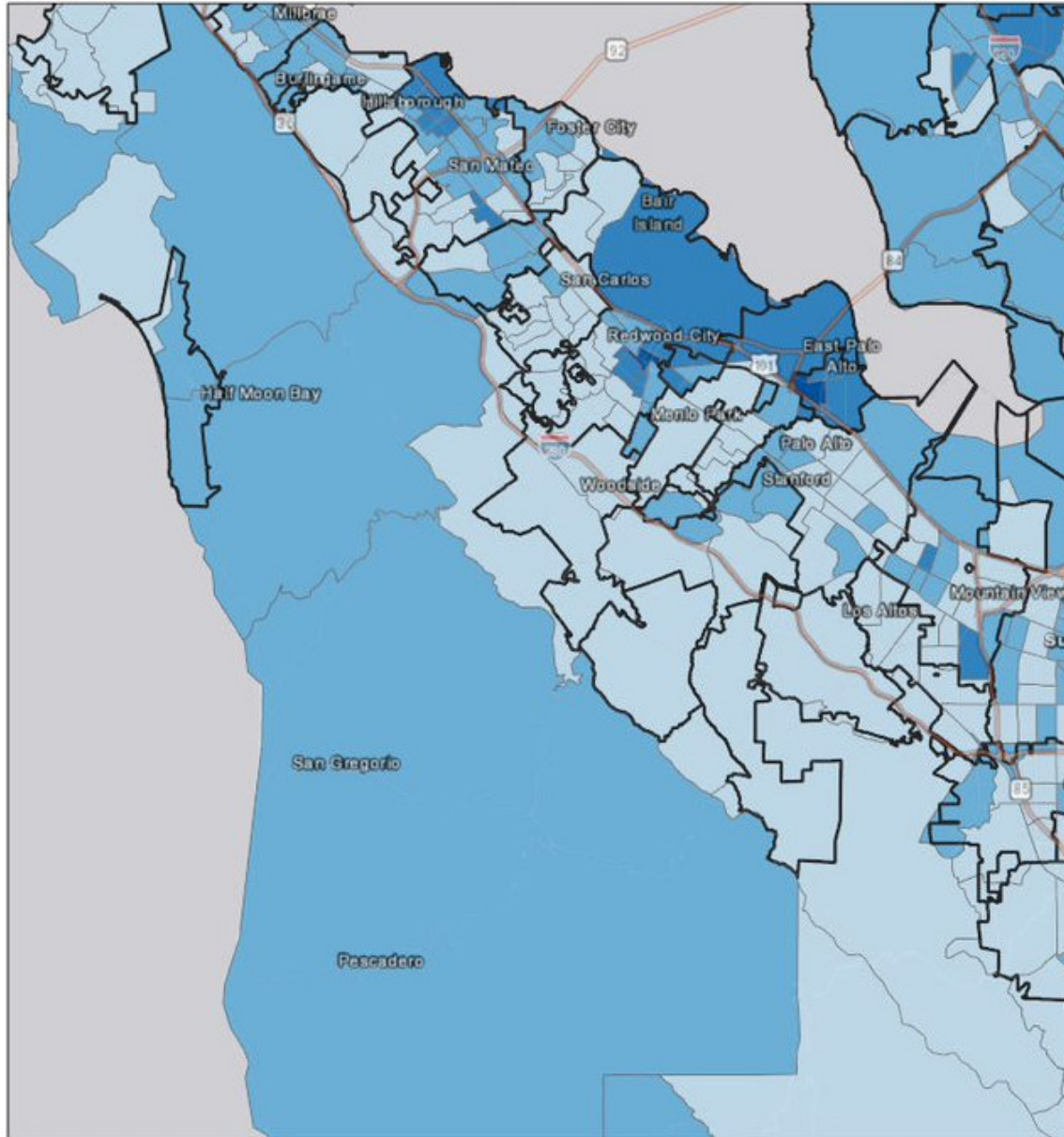
FIGURE 49: SOCIAL VULNERABILITY INDEX BY CENSUS TRACT, 2018

Source: California Department of Housing and Community Development AFFH Data Viewer

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☐ City/Town Boundaries

🟥 (A) SB 535 Disadvantaged Communities

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0   2   4   8 mi
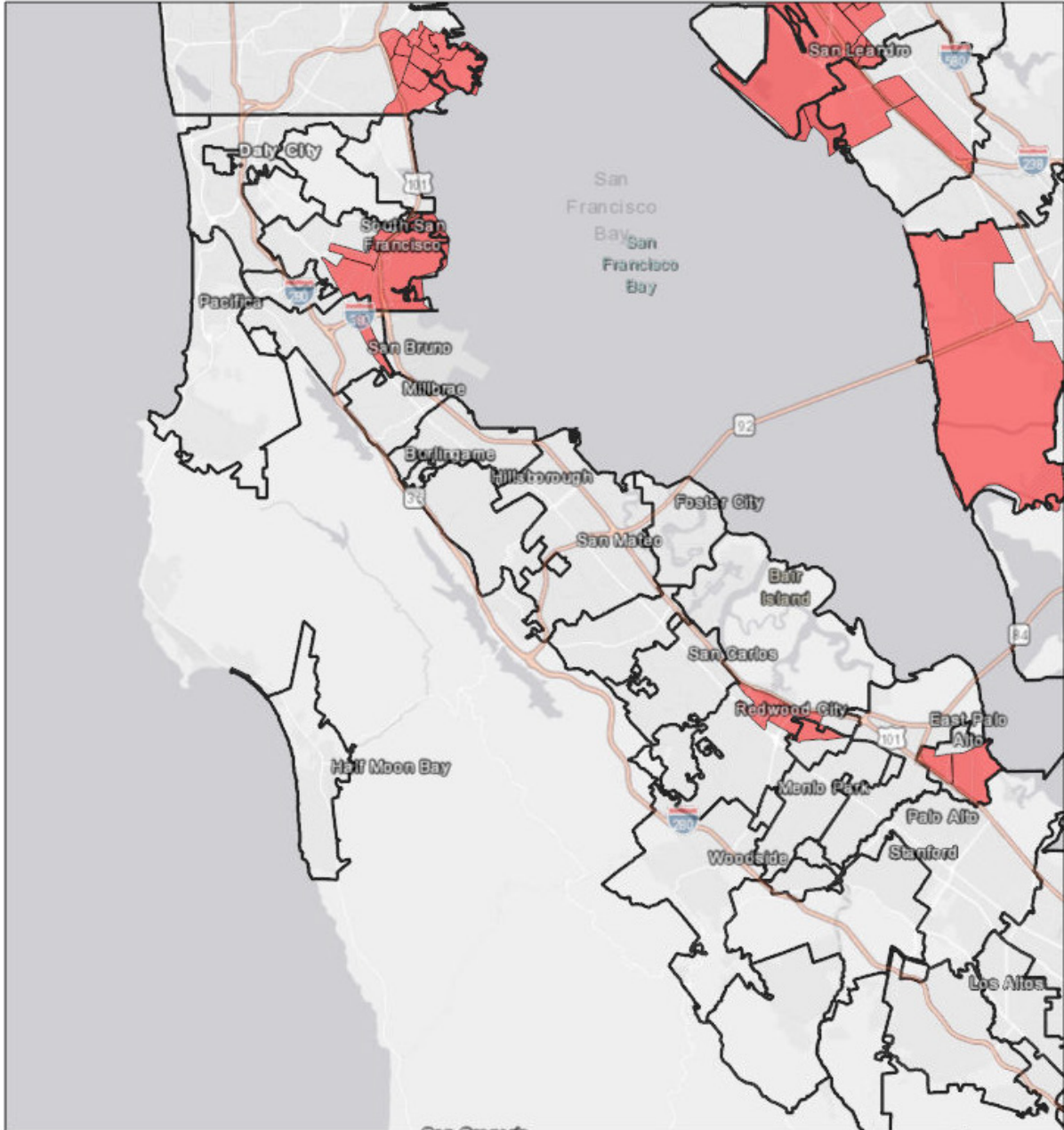
0   3   6   12 km

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CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021,
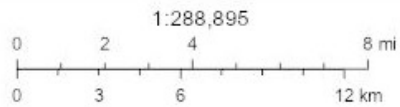
FIGURE 50: SB 535 DISADVANTAGED COMMUNITIES

Source: California Department of Housing and Community Development AFFH Data Viewer

5.6 DISPARITIES SPECIFIC TO THE POPULATION LIVING WITH A DISABILITY

Ten percent of the population in the Portola Valley are living with at least one disability, compared to 8% in the county. The most common disabilities in the city are hearing (5.2%), cognitive (4.3%), and independent living (4.1%).

> **DISABILITY**
>
> "Disability types include hearing difficulty, vision difficulty, cognitive difficulty, ambulatory difficulty, self-care difficulty, and independent living difficulty."

Source: California Department of Housing and Community Development Guidance, 2021, page 36.
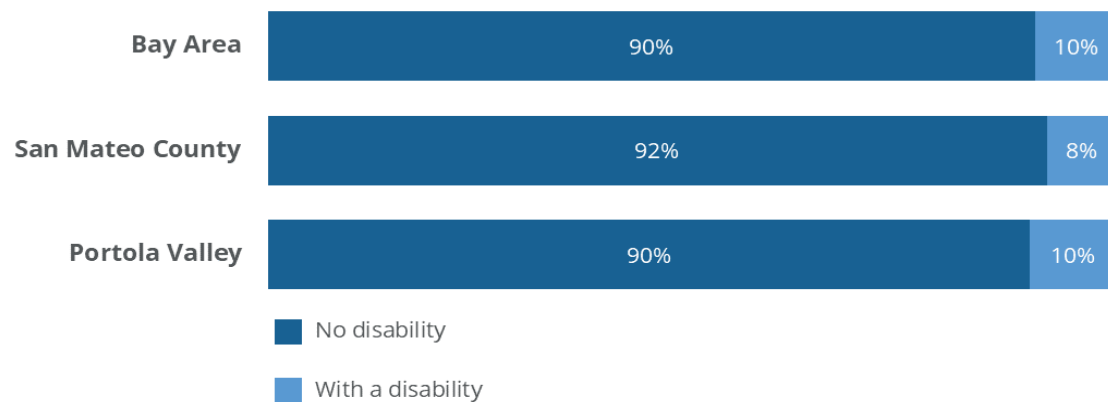
FIGURE 51: POPULATION BY DISABILITY STATUS, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook
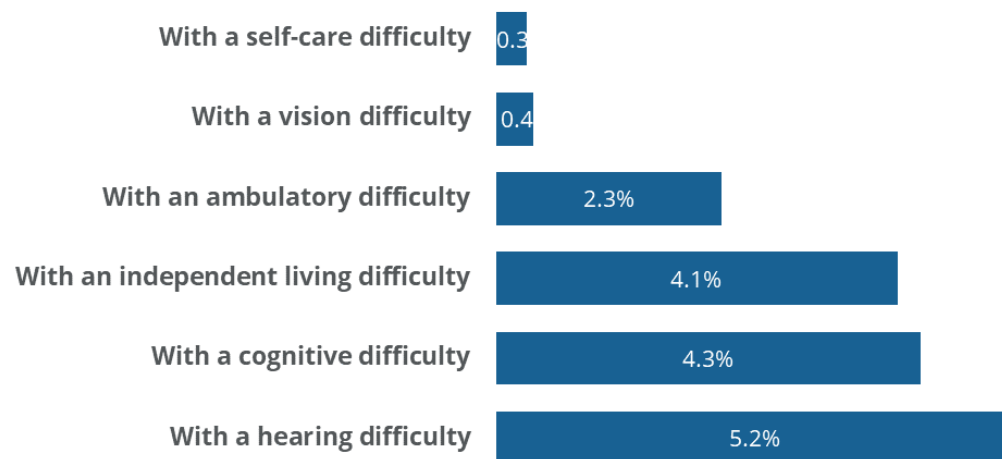
FIGURE 52: DISABILITY BY TYPE FOR THE NON-INSTITUTIONALIZED POPULATION 18 YEARS AND OVER, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

For the population 65 and over, the share of the population with an ambulatory or independent living difficulty increases. As mentioned above under access to transportation, San Mateo County is rapidly aging; therefore, this population with a disability is likely to increase.
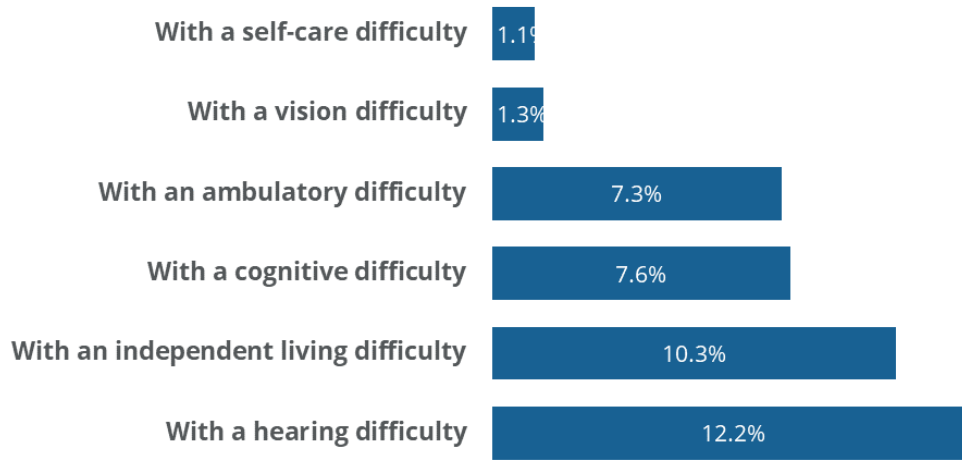

FIGURE 53: DISABILITY BY TYPE FOR SENIORS (65 YEARS AND OVER), PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

Unemployment among residents living with a disability (3%) in Portola Valley is the same those without a disability (3%) and similar to the county overall. Countywide, the unemployment rate for residents with a disability is 4%, compared to 3% for residents without a disability.
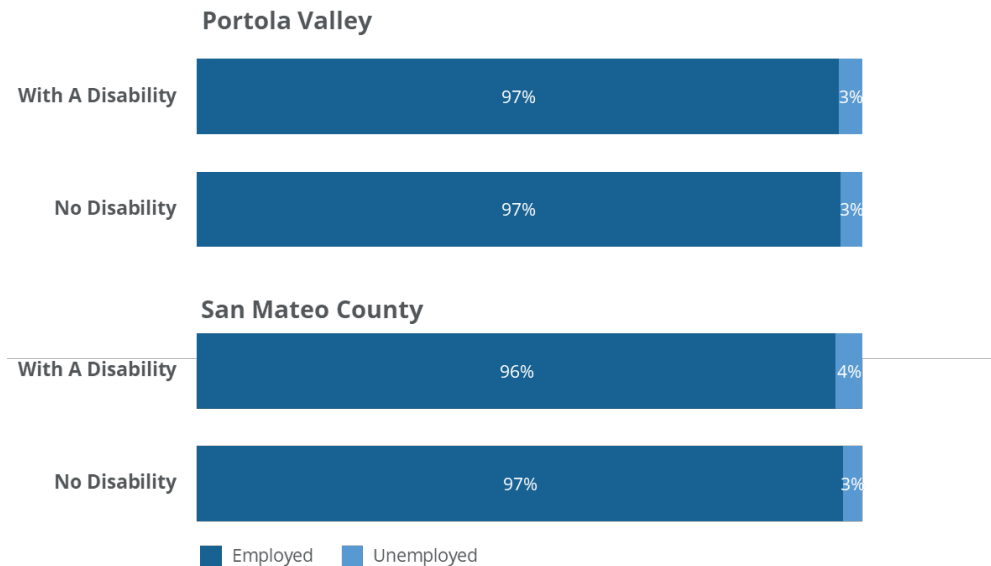
FIGURE 54: EMPLOYMENT BY DISABILITY STATUS, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

Access to Opportunity

Regional Access

	Portola Valley	San Mateo County
Jobs to Household Ratio	0.63	1.59
Unemployment Rate	0%	6%
LEP Population	2%	7%

Share of Population by Race in Resource Areas in Portola Valley

High/Highest Resource Area: 7% | 82% | 4% 6%

- American Indian or Alaska Native, NH
- Asian / API, NH
- Black or African American, NH
- White, Non-Hispanic (NH)
- Other Race or Multiple Races, NH
- Hispanic or Latinx

Employment by Disability Status

Portola Valley

	Employed	Unemployed
With A Disability	97%	3%
No Disability	97%	3%

San Mateo County

	Employed	Unemployed
With A Disability	96%	4%
No Disability	97%	3%

- Employed
- Unemployed

6. DISPROPORTIONATE HOUSING NEEDS

This section discusses disparate housing needs for protected classes including cost burden and severe cost burden, overcrowding, substandard housing conditions, homelessness, displacement, and other considerations.


DISPROPORTIONATE HOUSING NEEDS

"Disproportionate housing needs generally refers to a condition in which there are significant disparities in the proportion of members of a protected class experiencing a category of housing need when compared to the proportion of members of any other relevant groups, or the total population experiencing that category of housing need in the applicable geographic area. For purposes of this definition, categories of housing need are based on such factors as cost burden and severe cost burden, overcrowding,

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Source: California Department of Housing and Community Development Guidance, 2021, page 39.

6.1 HOUSING NEEDS

According to ABAG, the population of Portola Valley increased by 3.2% from 2000 to 2020, which is below the growth rate of the Bay area. However, the town's population growth trend has generally been in line with the county.
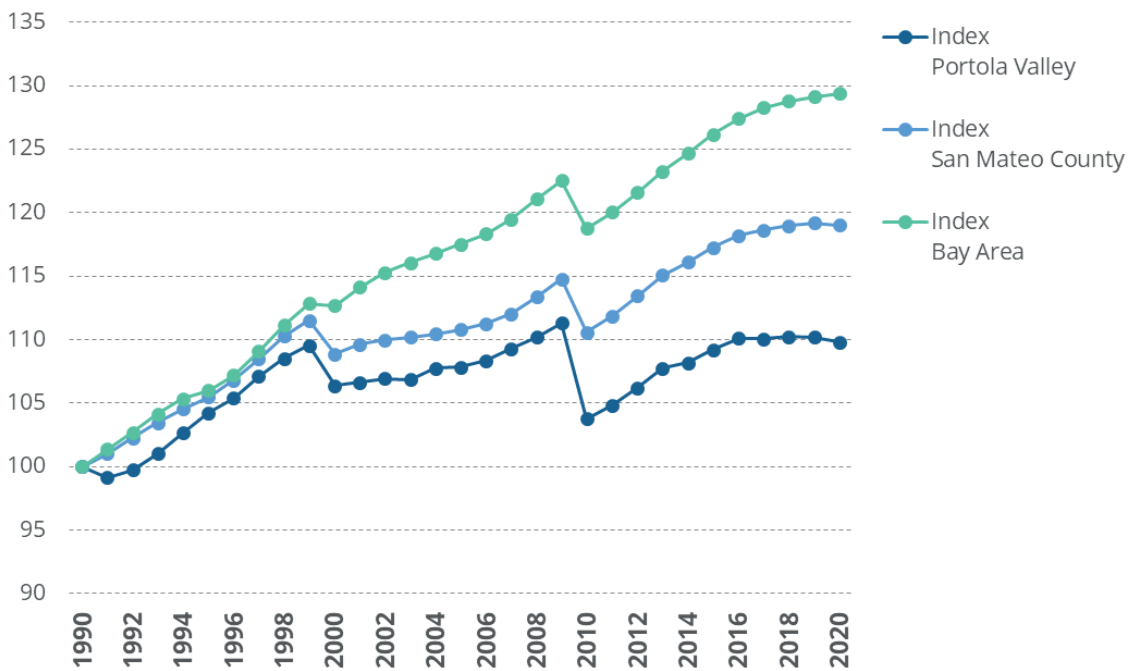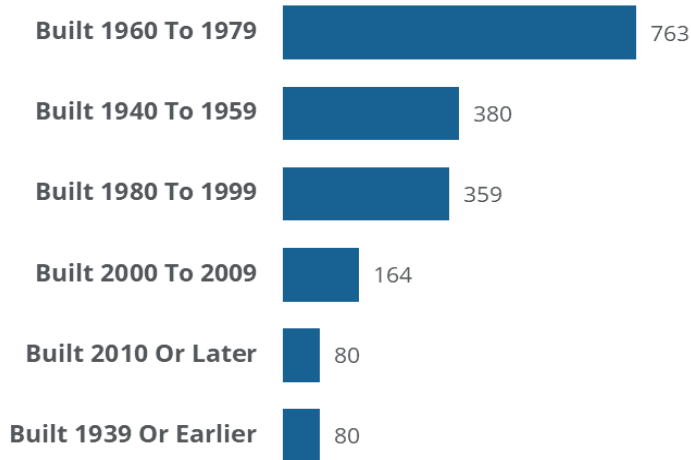

FIGURE 55: POPULATION INDEXED TO 1990

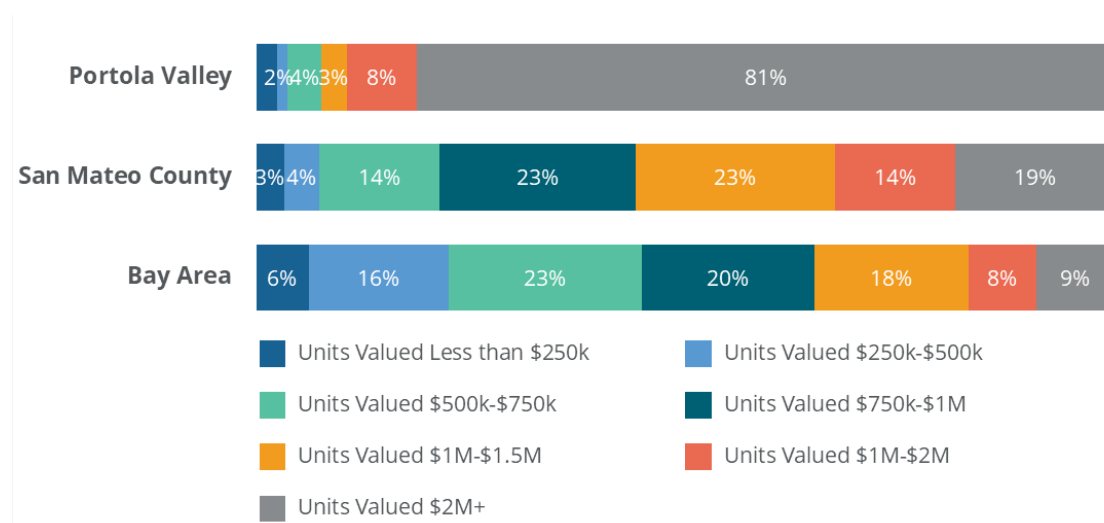*Source: ABAG Housing Needs Data Workbook*

ABAG also reports that number of homes in Portola Valley increased 1.6% from 2010 to 2020, below the growth rate for San Mateo County and the broader region.

The most concentrated development period for Portola Valley was 1960-1979, during which 42% of the housing inventory was built. Another 25% of units were built before 1960. As such, two-thirds of the town's units are older, may lack energy efficiency, could be costly to adapt for disability accessibility, and may have deferred maintenance if households cannot afford to make improvements.


Built 1960 To 1979 — 763
Built 1940 To 1959 — 380
Built 1980 To 1999 — 359
Built 2000 To 2009 — 164
Built 2010 Or Later — 80
Built 1939 Or Earlier — 80

FIGURE 56: HOUSING UNITS BY YEAR BUILT, PORTOLA VALLEY

Source: ABAG Housing Needs Data Workbook Compared to San Mateo County, the Portola Valley's owner occupied housing market has a far greater share of units priced over $2 million—81% of units in the town fall within this price range compared to 19% in the county. According to the Zillow home value index, home prices have experienced remarkable growth in the Portola Valley— even outpacing the county and the Bay Area overall.

Portola Valley: 2% 4% 3% 8% 81%
San Mateo County: 3% 4% 14% 23% 23% 14% 19%
Bay Area: 6% 16% 23% 20% 18% 8% 9%

Legend:
- Units Valued Less than $250k
- Units Valued $250k-$500k
- Units Valued $500k-$750k
- Units Valued $750k-$1M
- Units Valued $1M-$1.5M
- Units Valued $1M-$2M
- Units Valued $2M+

FIGURE 57: DISTRIBUTION OF HOME VALUE FOR OWNER OCCUPIED UNITS, 2019
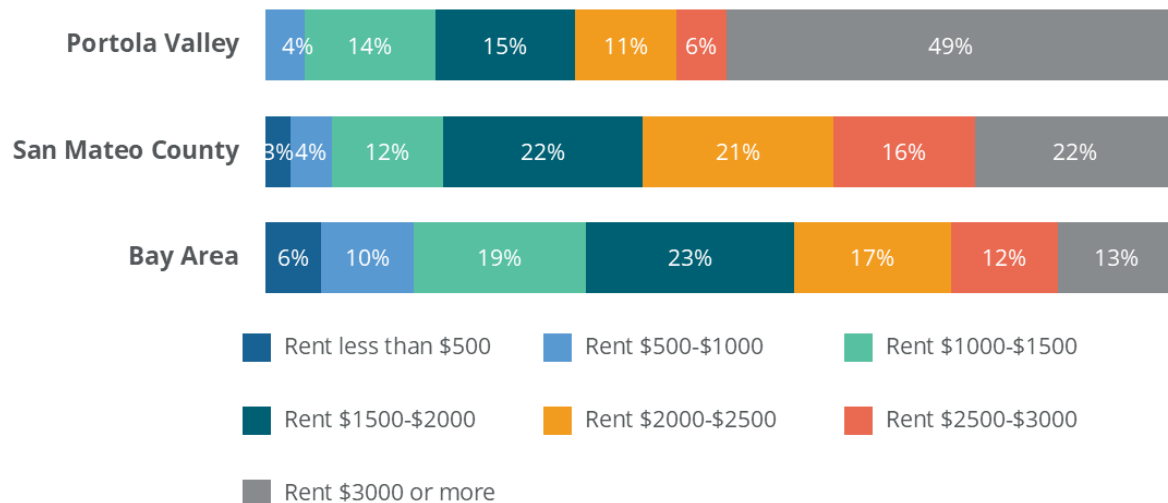
Source: ABAG Housing Needs Data Workbook
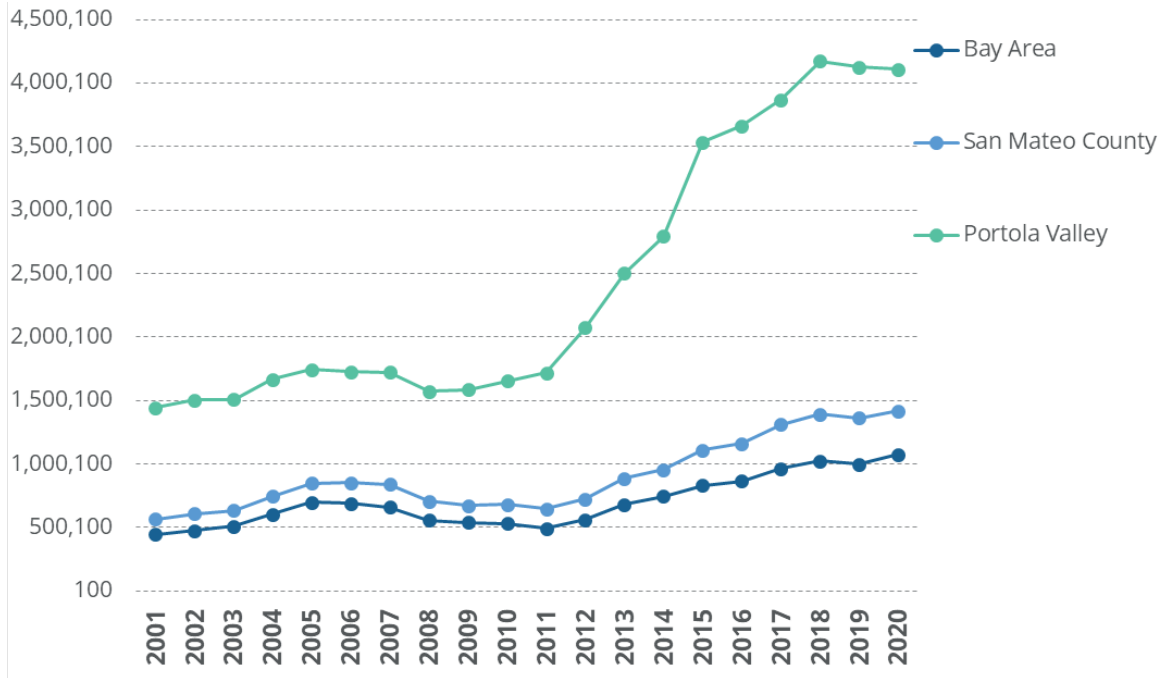
FIGURE 58: ZILLOW HOME VALUE INDEX, 2001-2020

Source: ABAG Housing Needs Data Workbook

Rents have increased at a slower pace compared to the for sale market—however, median rents still increased substantially over the past few years, rising by 47% between 2014 and 2019. Rent increases have likely been dampened by the COVID-19 pandemic. Compared to the county, the **Portola Valley has more luxury rental units**—49% of units rent for more than $3,000 in the town compared to 22% in the county.

FIGURE 59: DISTRIBUTION OF CONTRACT RENTS FOR RENTER OCCUPIED UNITS, 2019

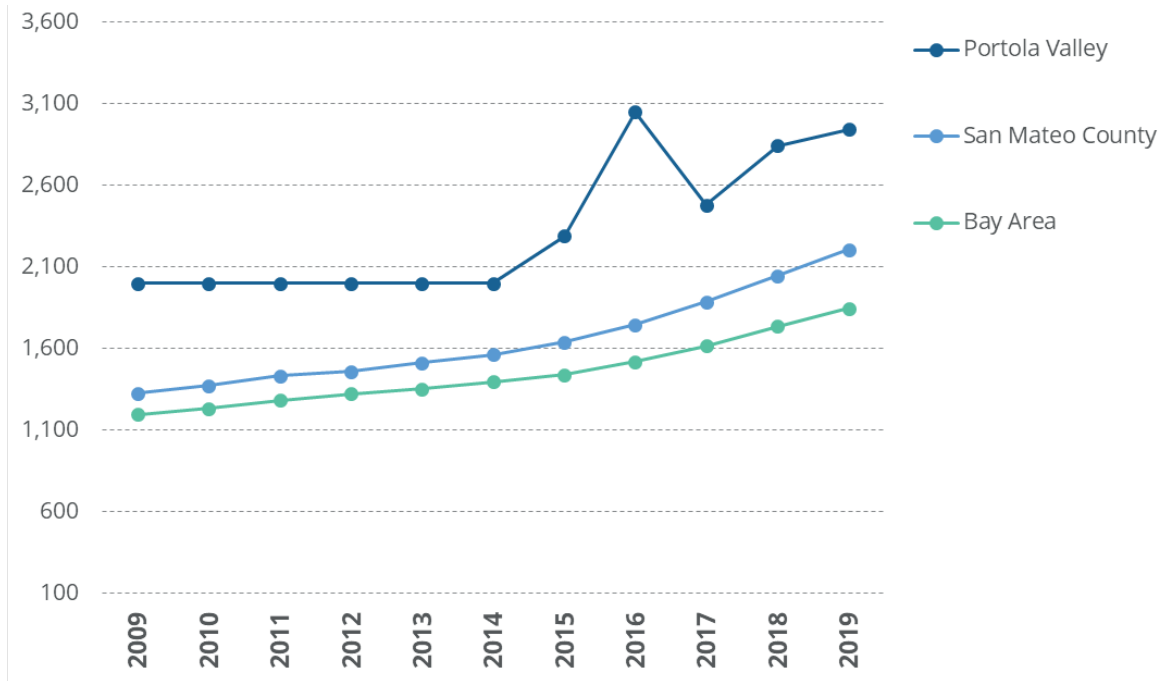*Source: ABAG Housing Needs Data Workbook*

FIGURE 60: MEDIAN CONTRACT RENT, 2009-2019

Source: ABAG Housing Needs Data Workbook

6.2 COST BURDEN AND SEVERE COST BURDEN

One quarter of all renter households in Portola Valley are cost burdened—spending more than 30% of their gross income on housing costs—and 12% are extremely cost burdened—spending more than 50% of their gross income on housing costs. Cost burdened households have less money to spend on other essentials like groceries, transportation, education, healthcare, and childcare. Extremely cost burdened households are considered at risk for homelessness.
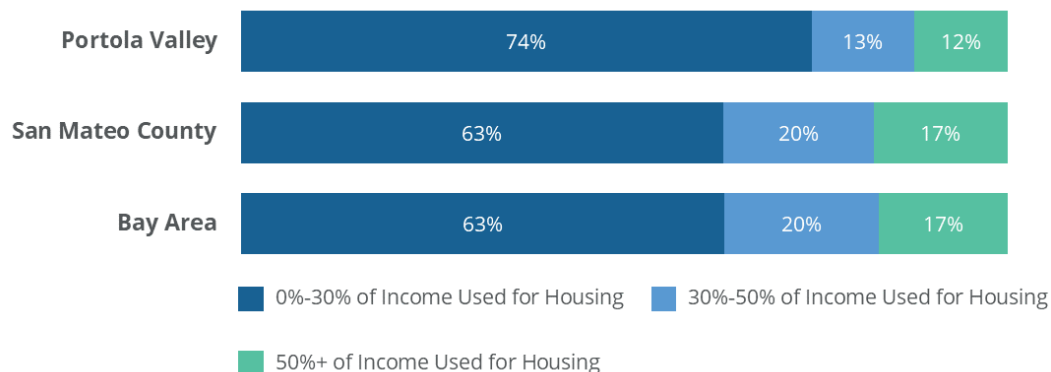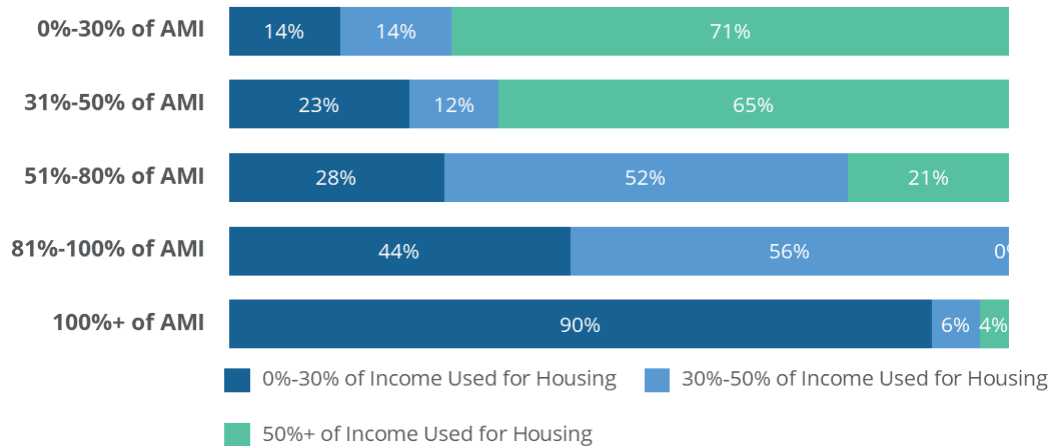

FIGURE 61: OVERPAYMENT (COST BURDEN) BY JURISDICTION, 2019

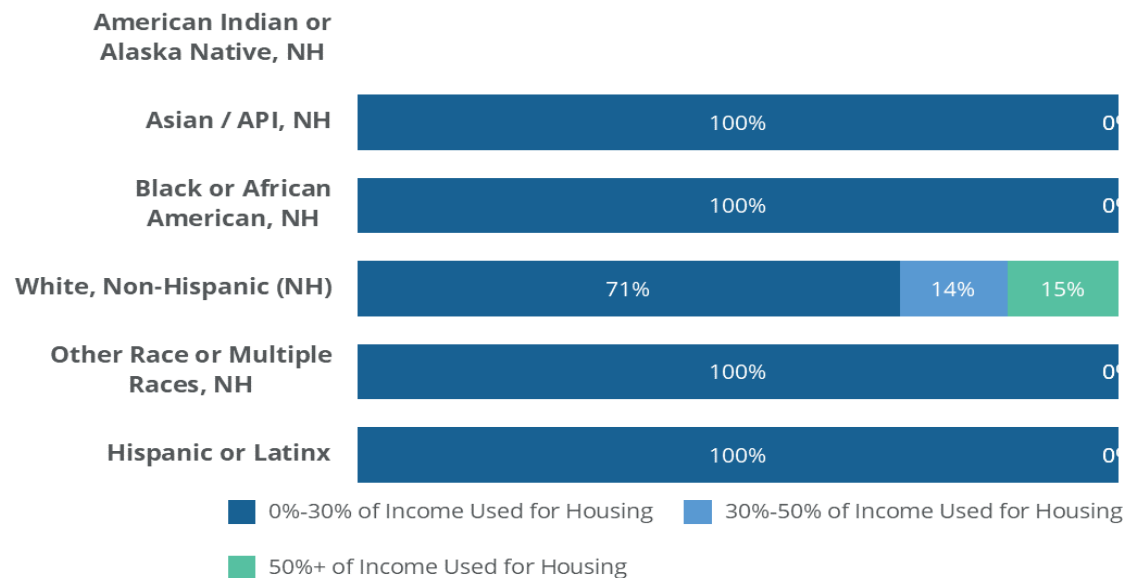*Source: ABAG Housing Needs Data Workbook*

A smaller portion of households in Portola Valley (25%) struggle with cost burden compared to the county (37%). Lower income households are more likely to experience housing cost burden. Nearly three out of every four households earning less than 30% AMI—considered extremely low income households—are severely cost burdened, compared to only 4% of households earning more than 100% of AMI.

FIGURE 62: OVERPAYMENT (COST BURDEN) BY AREA MEDIAN INCOME (AMI), PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook.

There is **little to no variation in the incidence of housing cost burden in Portola Valley by race/ethnicity**—the data show no cost burden among minority households. Large family households are less likely to experience cost burden than other household types.

FIGURE 63: OVERPAYMENT (COST BURDEN) BY RACE AND ETHNICITY, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

Since the town is comprised of just one census tract, there is no evident geographic concentration of cost burden.
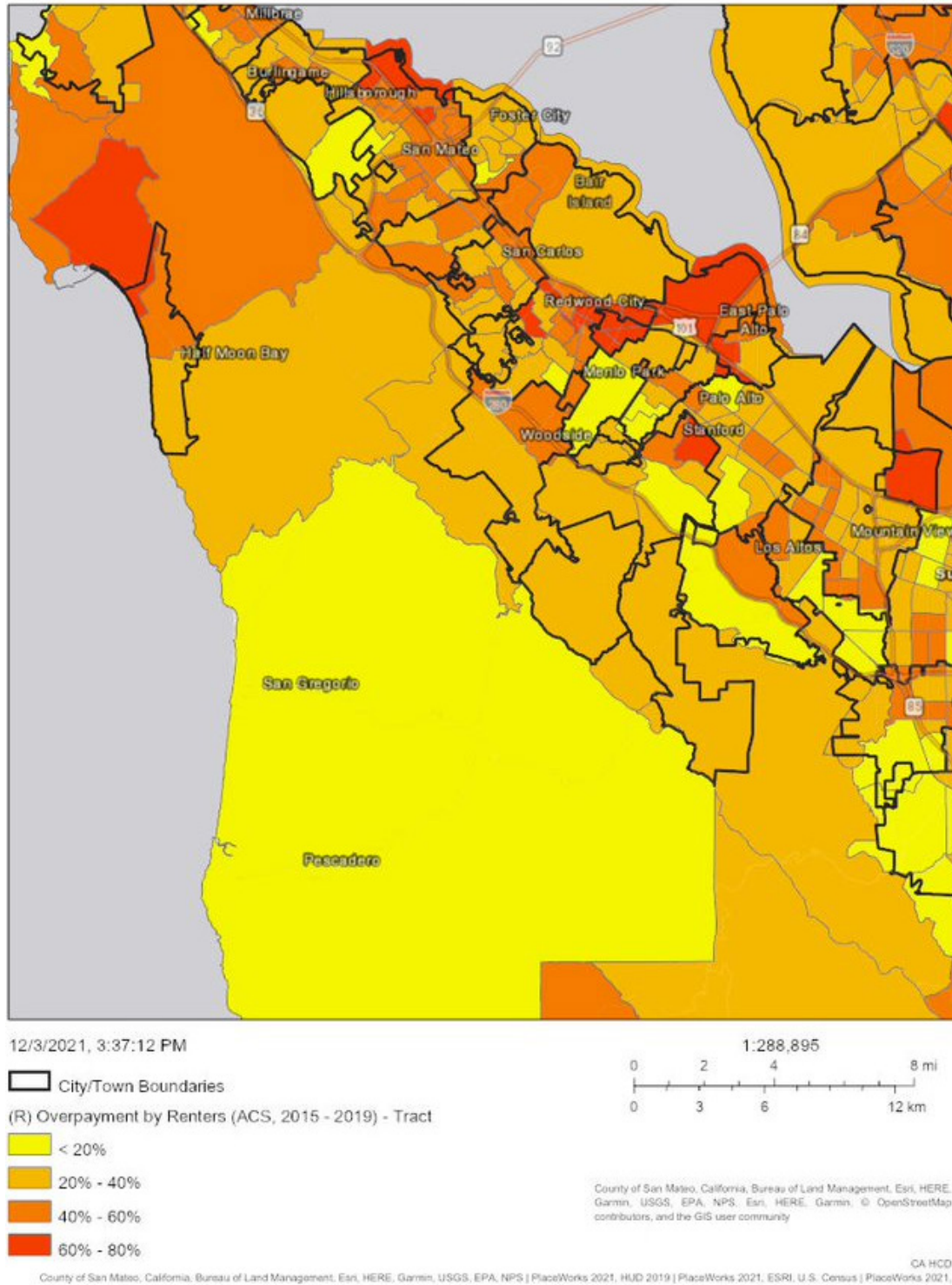
FIGURE 64: OVERPAYMENT (COST BURDEN) FOR RENTER HOUSEHOLDS BY CENSUS TRACT, 2019

Source: California Department of Housing and Community Development AFFH Data Viewer

6.3 OVERCROWDING

The vast majority of households (98%) in Portola Valley are not overcrowded—indicated by more than one occupant per room. However, renter households are more likely to be overcrowded with 8% of households with more than one occupant per room compared to 0% of owner households.

The data do no indicate racial and ethnic disparities in overcrowding in Portola Valley. Since the town is comprised of just one census tract, there is no evident geographic concentration of overcrowding within the town.
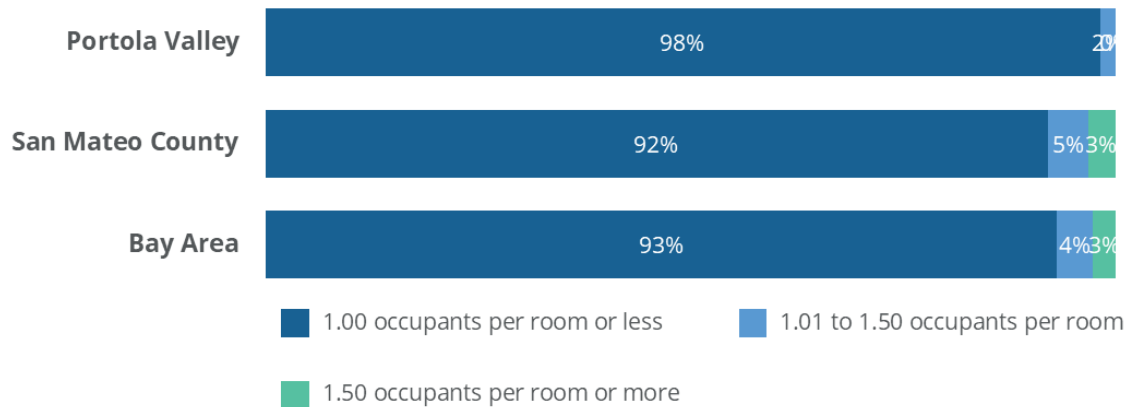
FIGURE 65: OCCUPANTS PER ROOM BY JURISDICTION, 2019

Source: ABAG Housing Needs Data Workbook
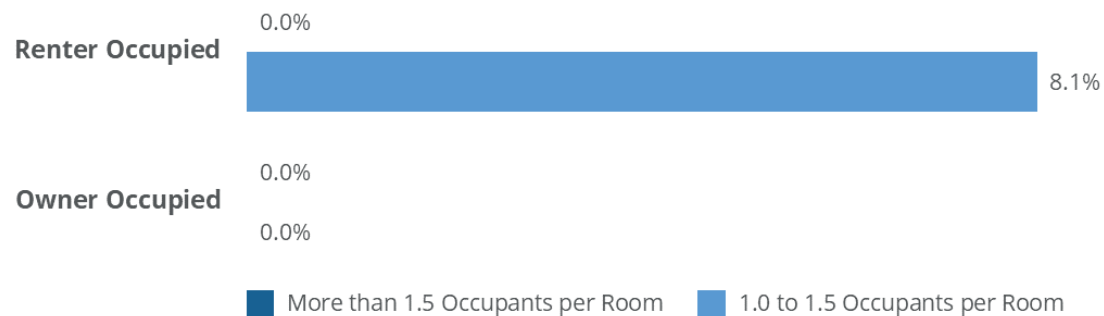
FIGURE 66: OCCUPANTS PER ROOM BY TENURE, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

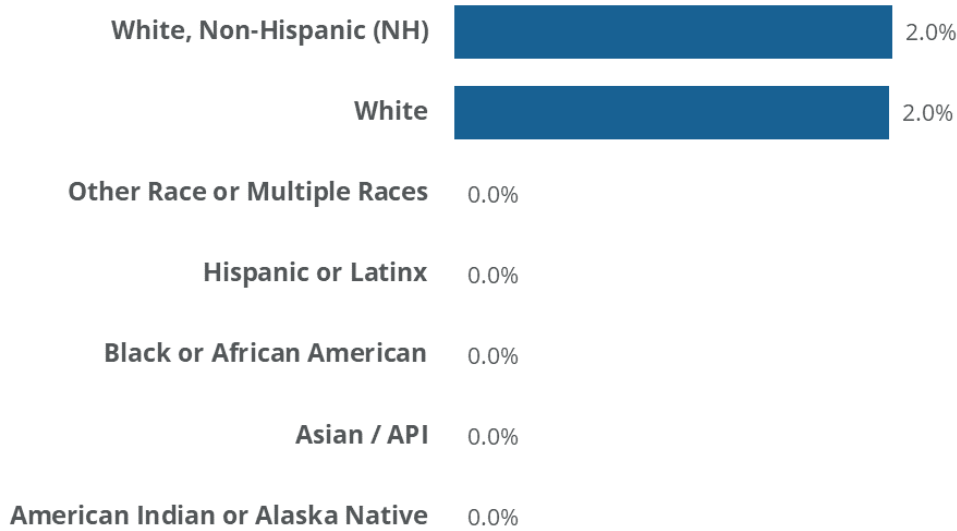|	
White, Non-Hispanic (NH)	2.0%
White	2.0%
Other Race or Multiple Races	0.0%
Hispanic or Latinx	0.0%
Black or African American	0.0%
Asian / API	0.0%
American Indian or Alaska Native	0.0%

FIGURE 67: OVERCROWDING BY RACE AND ETHNICITY, PORTOLA VALLEY, 2019

Note: Overcrowding is indicated by more than 1 person per room.
Source: ABAG Housing Needs Data Workbook

6.4   SUBSTANDARD HOUSING

Data on housing condition are very limited, with the most consistent data available across jurisdictions found in the American Community Survey (ACS)—which captures units in substandard condition as self-reported in census surveys. In Portola Valley, the data indicate 8% of all units have substandard kitchen facilities—all of these are shown to be rental units. This may actually reflect rental units with a common kitchen as opposed to residents living in substandard units.

Kitchen	1.2%
	31.8%
Plumbing	0.0%
	0.0%

■ Owner   ■ Renter
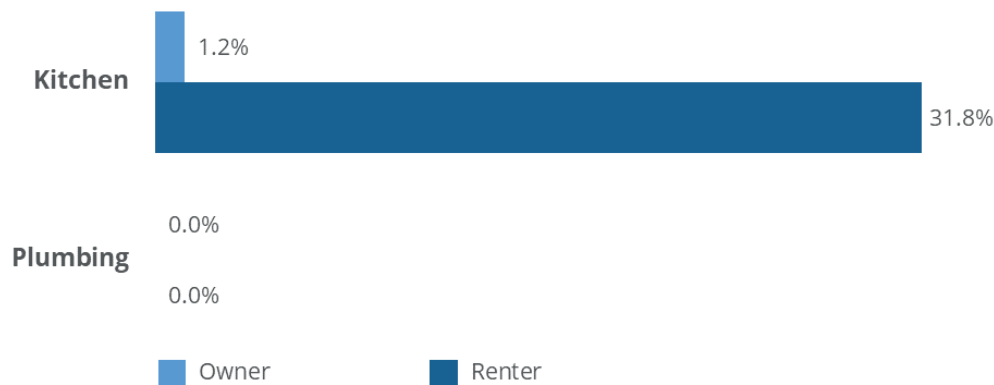
FIGURE 68: PERCENT OF UNITS LACKING COMPLETE KITCHEN AND PLUMBING FACILITIES, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

6.5 HOMELESSNESS

In 2019, 1,512 people were experiencing homelessness in the county during the One-Day Count, with 40% of people in emergency or transitional shelter while the remaining 60% were unsheltered. The majority of unsheltered people experiencing homelessness were in households without children. The majority of people in transitional housing were in households with children.

	People in Households Solely Children	People in Households with Adults and Children	People in Households Without Children
Sheltered - Emergency Shelter	0	68	198
Sheltered - Transitional Housing	0	271	74
Unsheltered	1	62	838

FIGURE 69: HOMELESSNESS BY HOUSEHOLD TYPE AND SHELTER STATUS, SAN MATEO COUNTY, 2019

Source: ABAG Housing Needs Data Workbook

People who identify as American Indian or Alaskan Native (6% of the homeless population compared to less than 1% of the total population), Black (13%, 2%), White (67%, 51%), and Hispanic (38%, 28%) are overrepresented in the homeless population compared to their share of the general population. People struggling with chronic substance abuse (112 people), severe mental illness (305), and domestic violence (127) represented a substantial share of the homeless population in 2019.
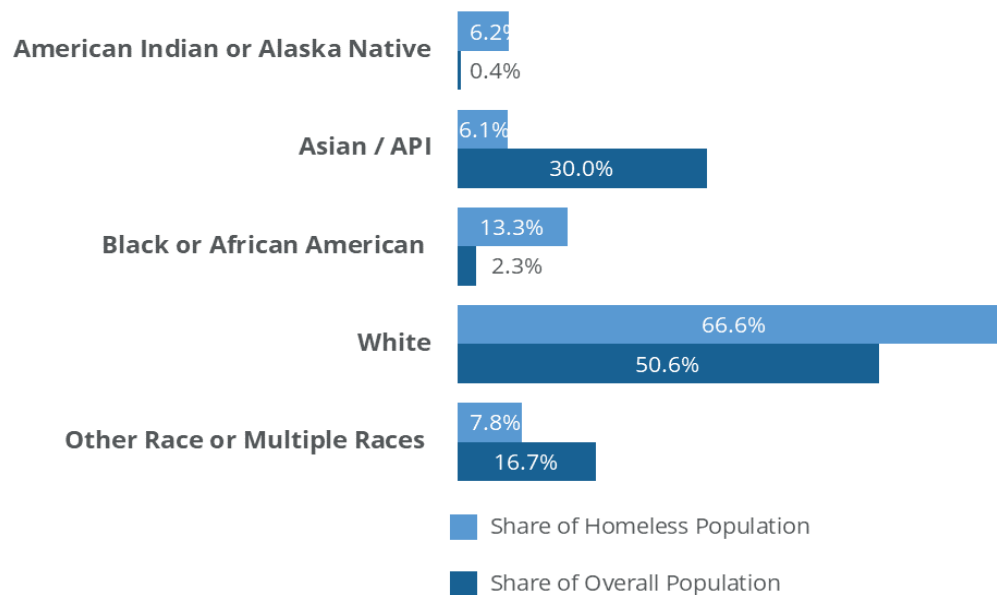
FIGURE 70: SHARE OF GENERAL AND HOMELESS POPULATIONS BY RACE, SAN MATEO COUNTY, 2019

Source: ABAG Housing Needs Data Workbook
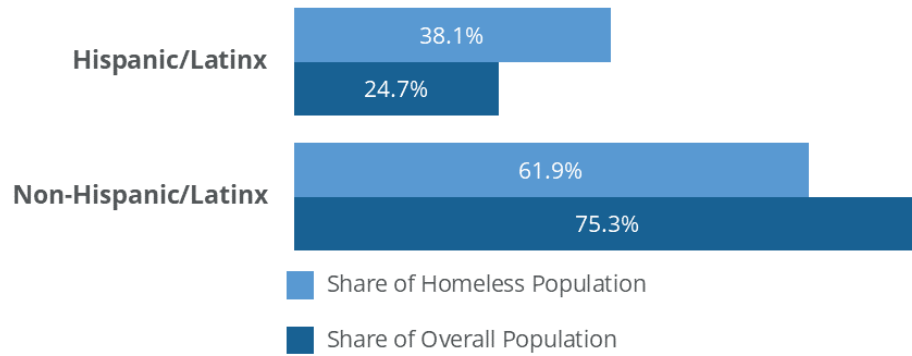
FIGURE 71: SHARE OF GENERAL AND HOMELESS POPULATIONS BY ETHNICITY, SAN MATEO COUNTY, 2019

Source: ABAG Housing Needs Data Workbook

|	Chronic Substance Abuse	HIV/AIDS	Severely Mentally Ill	Veterans	Victims of Domestic Violence
Sheltered - Emergency Shelter	46	0	70	31	10
Sheltered - Transitional Housing	46	3	46	4	14
Unsheltered	20	0	189	34	103

FIGURE 72: CHARACTERISTICS OF THE POPULATION EXPERIENCING HOMELESSNESS, SAN MATEO COUNTY, 2019

Source: ABAG Housing Needs Data Workbook

6.6 DISPLACEMENT

Displacement trends may be evaluated by both mobility trends (how often residents move) and by expiring contracts on income-restricted affordable units. Portola Valley households appear to have greater stability than households in the county overall—9% of Portola residents moved in the past year compared to 12% of county residents. Owner households generally experience a greater amount of housing stability whereas renter households are more mobile (i.e., move more frequently).
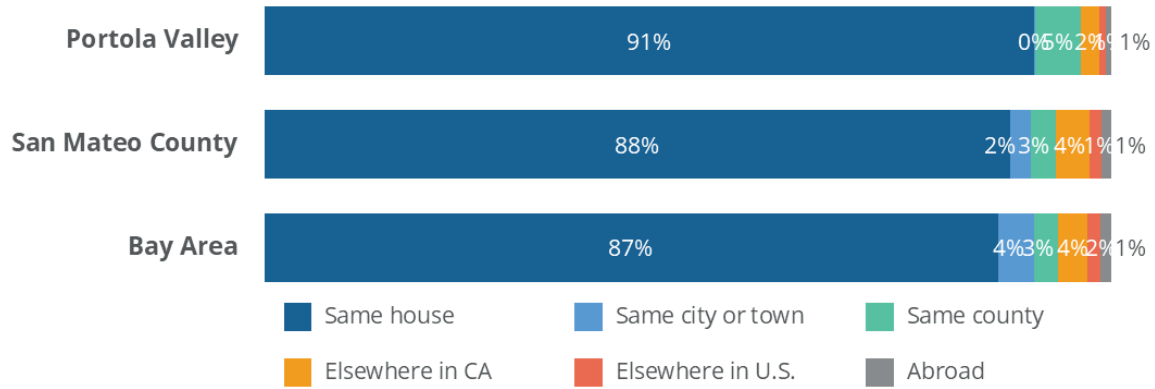
FIGURE 73: LOCATION OF POPULATION ONE YEAR AGO, 2019

Source: ABAG Housing Needs Data Workbook
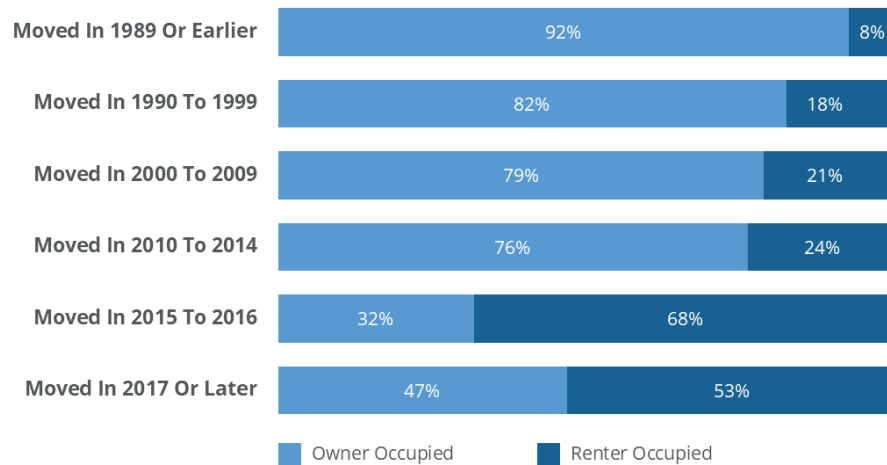
FIGURE 74: TENURE BY YEAR MOVED TO CURRENT RESIDENCE, PORTOLA VALLEY, 2019

Source: ABAG Housing Needs Data Workbook

According to HUD, there are no low income affordable units located in Portola Valley. As such, displacement due to expiring HUD contracts is less of a concern than access to the community for low income households.

	Low	Moderate	High	Very High	Total Assisted Units in Database
Portola Valley	0	0	0	0	0
San Mateo County	4,656	191	359	58	5,264
Bay Area	110,177	3,375	1,854	1,053	116,459

FIGURE 75: ASSISTED UNITS AT RISK OF CONVERSION, 2019

Source: ABAG Housing Needs Data Workbook

The Urban Displacement Project does not identify Portola Valley as having any areas vulnerable to displacement (see definitions below).

DISPLACEMENT SENSITIVE COMMUNITIES

"According to the Urban Displacement Project, communities were designated sensitive if they met the following criteria:

- They currently have populations vulnerable to displacement in the event of increased redevelopment and drastic shifts in housing cost. Vulnerability is defined as:
  - ➢ Share of very low income residents is above 20%, 2017
  - ➢ AND
  - ➢ The tract meets two of the following criteria:
    - – Share of renters is above 40%, 2017
    - – Share of people of color is above 50%, 2017
    - – Share of very low-income households (50% AMI or below) that are severely rent burdened households is above the county median, 2017
    - – They or areas in close proximity have been experiencing displacement pressures. Displacement pressure is defined as:
   - • Percent change in rent above county median for rent increases, 2012-2017

OR

- Difference between tract median rent and median rent for surrounding tracts above median for all tracts in county (rent gap), 2017."

Source: https://www.sensitivecommunities.org/.
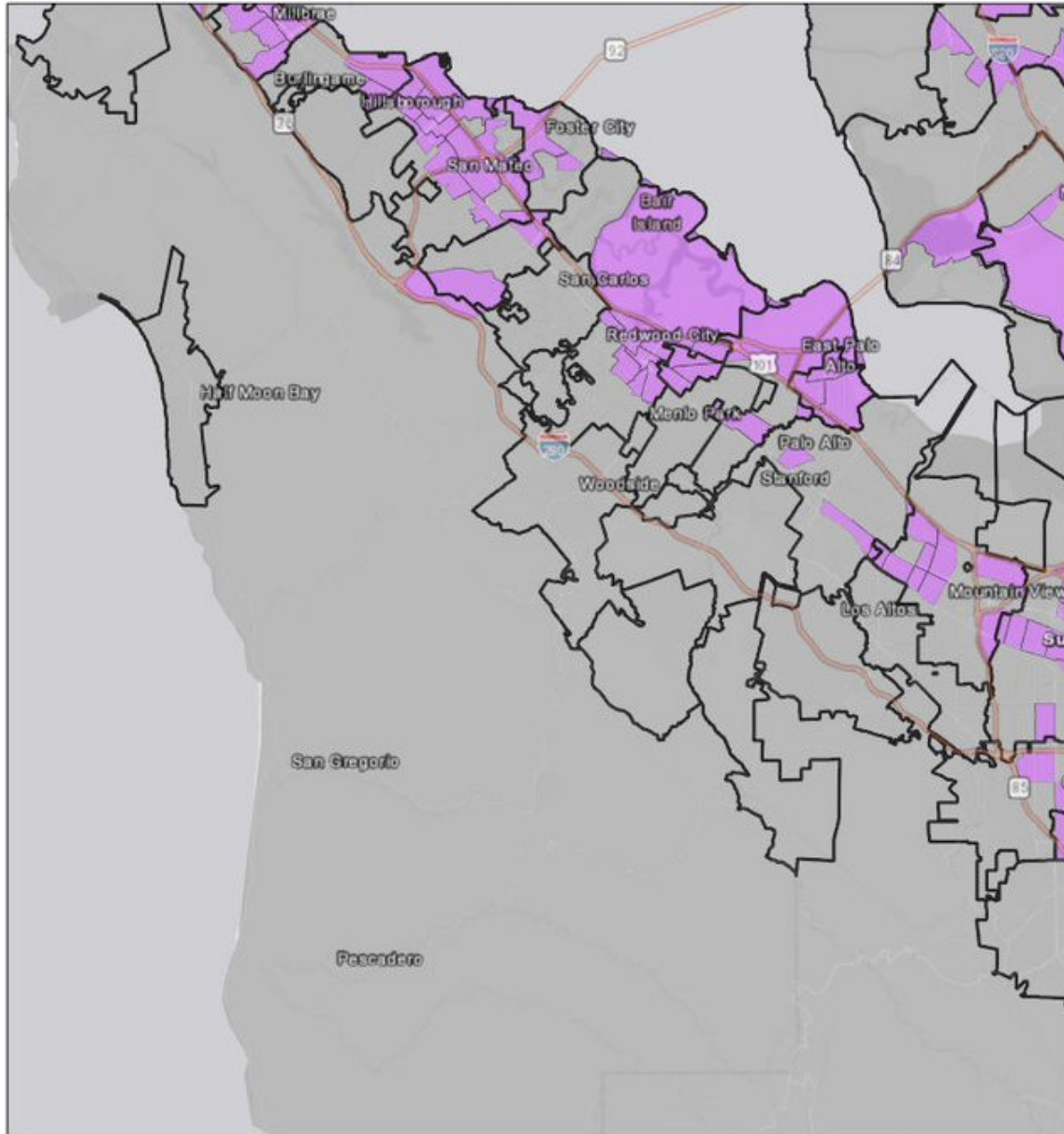
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☐ City/Town Boundaries

(A) Sensitive Communities (UCB, Urban Displacement Project)

■ Vulnerable

■ Other
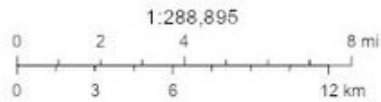
1:288,895

0   2   4   8 mi
0   3   6   12 km

County of San Mateo, California, Bureau of Land Management, Esri, HERE,
Garmin, USGS, EPA, NPS, Esri, HERE, Garmin, © OpenStreetMap
contributors, and the GIS user community

CA HCD

County of San Mateo, California, Bureau of Land Management, Esri, HERE, Garmin, USGS, EPA, NPS | PlaceWorks 2021, HUD 2019 | PlaceWorks 2021, ESRI, U.S. Census | PlaceWorks 2021.

FIGURE 76: CENSUS TRACTS VULNERABLE TO DISPLACEMENT

Source: California Department of Housing and Community Development AFFH Data Viewer
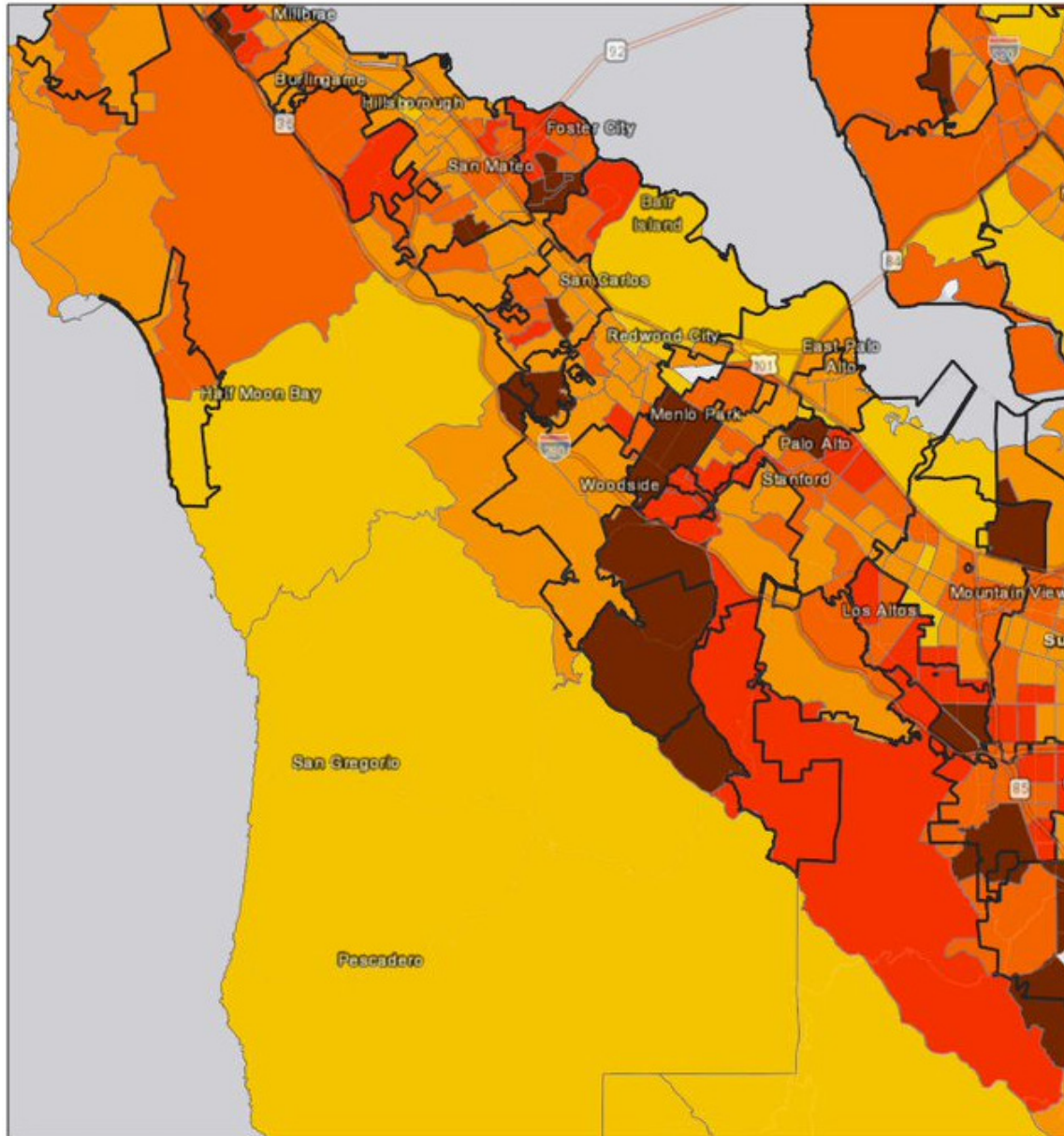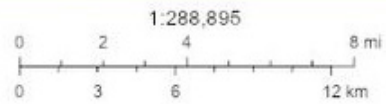
FIGURE 77: LOCATION AFFORDABILITY INDEX BY CENSUS TRACT

Source: California Department of Housing and Community Development AFFH Data Viewer

6.7 ACCESS TO MORTGAGE LOANS

Disparities by race and ethnicity are prevalent for home mortgage applications, particularly in denial rates. **Hispanic or Latinx (29% denial rate) and Asian households (19%) had the highest denial rates for mortgage loan** applications in 2018 and 2019, as shown in Figure 78. Conversely, non-Hispanic White (15%) and households of unknown race/ethnicity (11%) have the lowest denial rates during the same time. Data was not available for American Indian or Alaska Native households or for Black or African American households.
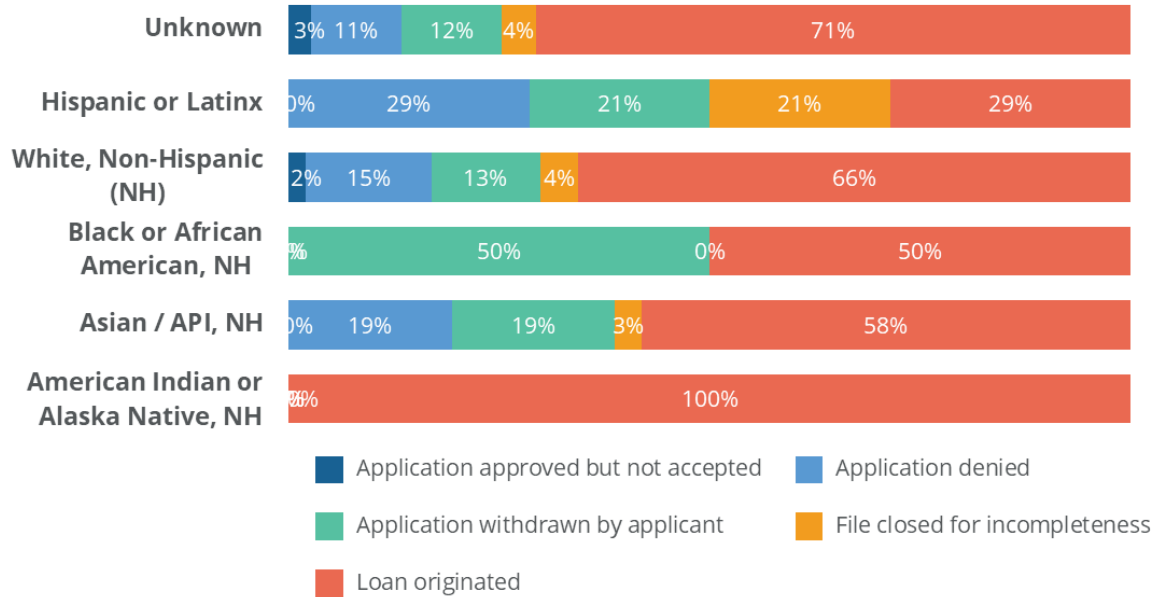
FIGURE 78: MORTGAGE APPLICATIONS BY RACE AND ETHNICITY, PORTOLA VALLEY, 2018-2019

Source: ABAG Housing Needs Data Workbook

Disproportionate Housing Needs

Cost Burden, Portola Valley, 2019

Area Median Income (AMI)

	0%-30% of Income Used for Housing	30%-50% of Income Used for Housing	50%+ of Income Used for Housing
0%-30% of AMI	14%	14%	71%
31%-50% of AMI	23%	12%	65%
51%-80% of AMI	28%	52%	21%
81%-100% of AMI	44%	56%	0%
100%+ of AMI	90%	6%	4%

■ 0%-30% of Income Used for Housing ■ 30%-50% of Income Used for Housing
■ 50%+ of Income Used for Housing
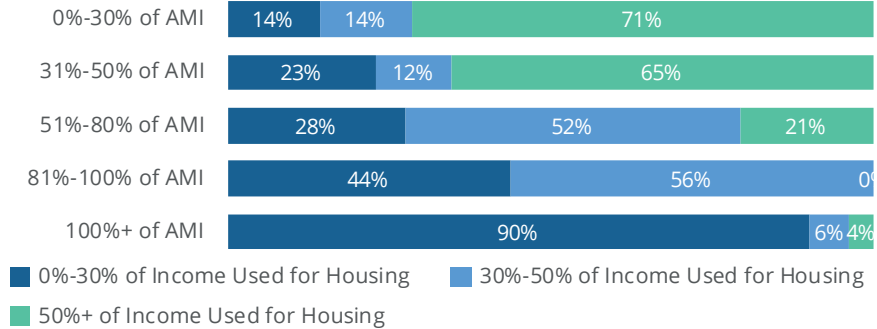
Overcrowding, Portola Valley, 2019

Occupants per Room by Tenure

	Owner	Renter
1.5+ Occupants per Room		
1-1.5 Occupants per Room		8.1%

■ Owner ■ Renter
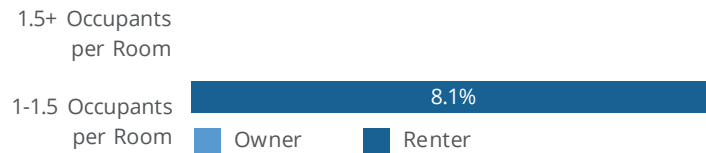
Substandard Housing, Portola Valley, 2019

Incomplete Kitchen and Plumbing Facilities by Tenure

	Owner	Renter
Kitchen	1.2%	31.8%
Plumbing	0.0%	0.0%

■ Owner ■ Renter
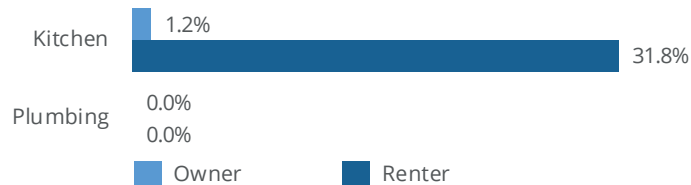
Homelessness, San Mateo County, 2019

Race and Ethnicity	Share of Homeless Population	Share of Overall Population
American Indian or Alaska Native	6%	0%
Asian / API	6%	30%
Black or African American	13%	2%
White	67%	51%
Other Race or Multiple Races	8%	17%

Displacement, 2020

Assisted Units at High or Very High Risk of Displacement

	Portola Valley	San Mateo County
Number of Units	0	417
% of Assisted Units	**0%**	**8%**

7. SITE INVENTORY ANALYSIS

AB 686 requires local governments to affirmatively further fair housing as part of their Housing Element Update process, inclusive of the identification of Housing Sites. Accordingly, the Town of Portola Valley identified land resources throughout the community which were considered suitable for the accommodation of potential future residential development. These resources were identified as housing sites to be utilized in planning efforts associated with the 6th cycle housing element update process to accommodate the Town's RHNA requirements for the 2023-2031 planning period in a way that affirmatively furthers fair housing efforts.

As described within the prior Assessment of Fair Housing Section, the Town of Portola Valley is a high-resource community that does not include any "low resource" areas or exhibited conditions of poverty within its municipal boundaries. However, due to the Town's concentration of above-moderate income households, and prohibitive housing costs, relative to the broader county and region, 100% of neighborhoods within Portola Valley are considered exclusive to low-income households. Accordingly, the Town's Housing Sites Inventory prioritizes increasing affordable housing opportunities throughout the town, including housing opportunities for lower-income households and other special needs populations.

7.1   LOCATION OF EXISTING AFFORDABLE HOUSING

Portola Valley has one rent-restricted affordable housing project within its jurisdiction and two additional pipeline and pending projects that will include affordable units. Woodside Priory School, a private catholic college preparatory school, provides two units for low-income residents. The Willow Commons project will include 11 low-income units and the Stanford Wedge project will include six low-income units (see *Section 6, Adequate Sites* for more information). ADUs provide scattered additional affordable housing units throughout the single-family neighborhoods.

7.2   DISTRIBUTION OF SITES IN THE SITES INVENTORY

The proposed housing sites in the Sites Inventory are well distributed to increase opportunities throughout the town, given the significant geologic and fire safety constraints. Sites were evaluated for proximity to faults, unstable soils, and steep topography prior to selection. In addition, ADUs distributed throughout the single-family neighborhoods will increase housing options in these areas.

7.3   POTENTIAL EFFECT ON PATTERNS OF SEGREGATION

Although Portola Valley doesn't have significant segregation issues within the town, from a broader regional perspective, providing increased lower-income housing opportunities in a high resource community such as Portola Valley will help overcome Countywide and regional patterns of segregation, disparate impacts for impacted racial and ethnic groups, and foster more inclusive communities free from barriers that restrict access to opportunity.

7.4   POTENTIAL EFFECT ON ACCESS TO OPPORTUNITY

The wide distribution of housing sites will provide additional housing options for lower income households to choose housing near amenities and services. The sites in the Sites Inventory were selected based on accessibility to a variety of services and amenities, such as parks/trails, schools, shopping, and transportation. From a broader regional perspective, providing increased lower income housing opportunities in a high resource community such as Portola Valley will help overcome Countywide and regional patterns of disparate impacts for impacted racial and ethnic groups by providing more affordable housing choices near desirable resources such as employment and high-quality education. This will foster more inclusive communities free from barriers that restrict access to opportunity.

7.5   POTENTIAL EFFECT ON DISPROPORTIONATE HOUSING NEEDS

"Disproportionate housing needs generally refers to a condition in which there are significant disparities in the proportion of members of a protected class experiencing a category of housing need when compared to the proportion of members of any other relevant groups, or the total population experiencing that category of housing need in the applicable geographic area. For purposes of this definition, categories of housing need are based on such factors as cost burden and severe cost burden, overcrowding, homelessness, and substandard housing conditions."[25]

While household incomes within Portola Valley are relatively high when compared to other jurisdictions, there are still households considered some level of cost burdened. In Portola Valley, 17.1% of households spend 30% to 50% of their income on housing and are considered "cost burdened" while 11.7% of households are severely cost burdened and use over 50% of their income for housing. There are also disparities in housing cost burden in Portola Valley by tenure, while 20.2% of property owners experience cost burden, 46.9% of renters experience the same.

The increased quantity and distribution of affordable housing as proposed in the Sites Inventory will address disproportionate housing needs by providing more affordable housing in a wider variety of locations in the town. From a broader regional perspective, providing increased lower income housing opportunities in a high resource community such as Portola Valley will help overcome Countywide and regional patterns of disproportional housing needs.

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[25] California Department of Housing and Community Development Guidance, 2021, page 39.

8. CONTRIBUTING FACTORS AND FAIR HOUSING ACTION PLAN

The disparities in housing choice and access to opportunity discussed above stem from historical actions, socioeconomic factors that limit employment and income growth, broad barriers to open housing choice, and until recently, very limited resources to respond to needs. Pursuant to Government Code Section 65583 (c)(10)(A)(v), the Housing Element includes several policies and programs to proactively address fair housing issues. Table 11 below summarizes the fair housing issues, contributing factors, and implementation programs included in the Housing Element to affirmatively further fair housing in Portola Valley.

TABLE 11: FAIR HOUSING ACTION PLAN

Fair Housing Issues	Contributing Factors	Meaningful Program Actions (from *Section 7, Goals, Policies, and Programs*)	Targets and Timelines
The Town of Portola Valley has limited racial and ethnic diversity (18% of residents are non-White Hispanic) compared to San Mateo County (61%) and the Bay Area overall, and very limited economic diversity (73% of households earn more than 100% AMI compared to 49% in the county overall). Portola Valley has a lower percentage of lower income households than the rest of the San Mateo County and the Bay Area, with 22% of households earning less than 80% of the AMI compared to 40% of households in San Mateo County and 39% of households in the Bay Area as a whole. This equates to 480 households currently living in Portola Valley who are below the AMI, and 255 households who are below 50% AMI which means they would qualify for very low-income housing.	There is a lack of affordable housing opportunities throughout the town. There are no areas of the town that are zoned to allow moderate or high-density residential development. Existing policies do not encourage a range of housing types.	▪ 1-1: Create two new zoning districts that allows for multi-family housing at eight and 20 du/acre to provide for development of housing at lower-income levels. ▪ 1-2: Create a new zoning district that allows for mixed-use development with up to six du/ac and would allow for up to 100% of building floor area to be dedicated to residential uses. ▪ 2-1: Amend the zoning ordinance to establish inclusionary housing requirements for new multi-family housing developments. ▪ 2.2: Develop a program to manage new affordable housing units in the town. ▪ 7-3: Provide direct assistance from the Building Division for property owners interested in making minor changes to accommodate a JADU. ▪ 7-4: Establish staff and consultant ADU office hours so that applicants can ask questions of subject matter experts. ▪ 7-6: Develop an affordable ADU rental program that matches landlords willing to rent ADUs at below market rates with low-income tenants that who have been experienced displacement from areas outside of Portola Valley due to increasing rents with Portola Valley ADU owners	▪ December 2022 ▪ December 2022 ▪ Initiate by June 2023 and implement program by December 2023. ▪ June 2024 ▪ Complete rezoning by 3 years and 120 days from January 31, 2023 ▪ Initiate office hours by June 2023. ▪ Develop program by June 2023.

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		willing to rent ADUs at below market rates.	
		▪ 8-5: Rezone properties in the town to allow multi-family housing with a range of affordability levels and deed restrictions to ensure affordability over time. Affirmatively market the housing to households that are under-represented in the town including Black and Hispanic households.	▪ Complete rezoning by 3 years and 120 days from January 31, 2023.
		▪ 8-6: Through collaboration with local service providers, convene a discussion of populations that are experiencing comparatively high rates of cost burden to discuss solutions for relief. Consider a rental assistance program tailored to extremely high cost-burdened residents (residents that pay a very high percentage of their income towards housing). This may be in coordination with ADU/JADU programs. Include Black, Indigenous and people of color in these conversations.	▪ Initiate by June 2024. Consider program by December 2024.
In 2018 and 2019, Hispanic or Latinx and Asian households in Portola Valley faced higher rates of mortgage loan denials when trying to purchase homes in Portola Valley (29% and 19%, respectively).[a]	It is well documented that persons of color have been historically denied loans to purchase homes at a higher rate than white applicants. These historical patterns persist in some cases.	▪ Mortgage acceptance rates are outside of local control. It is included here to bring attention to this issue.	
Portola Valley residents do not report experiencing fair housing discrimination. However,	Tenants and property owners may lack knowledge about fair housing laws. Limited	▪ 8-7: Collaborate with other cities/towns and Project Sentinel, or another similar organization, to perform fair housing	▪ Establish list by December 2023. Issue written materials annually

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Fair Housing Issues	Contributing Factors	Meaningful Program Actions (from *Section 7, Goals, Policies, and Programs*)	Targets and Timelines
residents may not take action because they are not aware of resources for fair housing.	information provided by the Town on fair housing rights.	training for property owners, real estate agents, and tenants across the region. The training would include information on reasonable accommodation and source of income discrimination, as well as other fair housing information with emphasis on certain topics driven by housing complaint data and information from stakeholders. Participation in fair housing training will be required for approval of landlords' business licenses. Focus enforcement efforts on race-based discrimination and reasonable accommodations.	thereafter. Conduct two workshops by 2030.
		▪ 8-8: Create a webpage specific to fair housing including resources for residents who feel they have experienced discrimination, information about filing fair housing complaints with HCD or HUD, and information about protected classes under the Fair Housing Act.	▪ December 2023

a Federal Financial Institutions Examination Council's (FFIEC) Home Mortgage Disclosure Act loan/application register (LAR) files.

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