



## REGULAR MEETING AGENDA

**Date:** 8/2/2023  
**Time:** 6:30 p.m.  
**Location:** [Zoom.us/join](https://zoom.us/join) – ID# 895 2840 6631 and  
Arrillaga Recreation Center, Oak Room  
700 Alma St, Menlo Park, CA 94025

Members of the public can listen to the meeting and participate using the following methods.

### How to participate in the meeting

- Access the meeting, in-person, at the Downtown Conference Room
- Access the meeting real-time online at:  
[Zoom.us/join](https://zoom.us/join) –Meeting ID# 895 2840 6631
- Access the meeting real-time via telephone at:  
(669) 900-6833  
Meeting ID# 895 2840 6631  
Press \*9 to raise hand to speak

Subject to change: The format of this meeting may be altered or the meeting may be canceled. You may check on the status of the meeting by visiting the city website [menlopark.gov](https://menlopark.gov). The instructions for logging on to the webinar and/or the access code is subject to change. If you have difficulty accessing the webinar, please check the latest online edition of the posted agenda for updated information ([menlopark.gov/agendas](https://menlopark.gov/agendas)).

### Regular Session

- A. Call To Order**
- B. Roll Call**
- C. Public Comment**

Under “Public Comment,” the public may address the Commission on any subject not listed on the agenda. Each speaker may address the Commission once under public comment for a limit of three minutes. You are not required to provide your name or City of residence, but it is helpful. The Commission cannot act on items not listed on the agenda and, therefore, the Commission cannot respond to non-agenda issues brought up under public comment other than to provide general information.

- D. Presentations and Proclamations**

- D1. Presentation: Menlo Park housing resources ([Attachment](#))



## **E. Regular Business**

- E1. Recommendation to appropriate \$4.18 million from the Below Market Rate (BMR) housing fund to three Notice of Funding Availability (NOFA) 2022 applicants to support affordable housing activities ([Staff Report #23-005-HC](#))

## **F. Reports and Announcements**

- F1. Commissioner updates
- F2. Future agenda items
- F3. Staff updates and announcements

## **G. Adjournment**

At every Regular Meeting of the Commission, in addition to the Public Comment period where the public shall have the right to address the Commission on any matters of public interest not listed on the agenda, members of the public have the right to directly address the Commission on any item listed on the agenda at a time designated by the Chair, either before or during the Commission's consideration of the item.

At every Special Meeting of the Commission, members of the public have the right to directly address the Commission on any item listed on the agenda at a time designated by the Chair, either before or during consideration of the item.

For appeal hearings, appellant and applicant shall each have 10 minutes for presentations.

If you challenge any of the items listed on this agenda in court, you may be limited to raising only those issues you or someone else raised at the public hearing described in this notice, or in written correspondence delivered to the City of Menlo Park at, or prior to, the public hearing.

Any writing that is distributed to a majority of the Commission by any person in connection with an agenda item is a public record (subject to any exemption under the Public Records Act) and is available by request by emailing the city clerk at [jaherren@menlopark.gov](mailto:jaherren@menlopark.gov). Persons with disabilities, who require auxiliary aids or services in attending or participating in Commission meetings, may call the City Clerk's Office at 650-330-6620.

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# Samaritan House

***Fighting Poverty, Lifting Lives***

**Wednesday, August 2, 2023**







# SAMARITAN HOUSE

**Food Services**

**Shelter  
Services**

**Medical &  
Dental Clinics**

**Kids Closet &  
Holiday  
Program**

**Client Services  
& Financial  
Empowerment**

**Worker Resource  
Center**

**Coordinated  
Entry System**

The names by which you know our Samaritan House Programs



# Client Services

## ■ Office Locations

- ✓ San Mateo: Belmont, Burlingame, Foster City, Hillsborough, Millbrae, San Carlos, San Mateo
- ✓ East Palo Alto: East Palo Alto and Menlo Park
- ✓ **NEW: Burlingame Annex**

## ■ Evaluate Needs

- ✓ Assess and determine eligibility for financial assistance, such as late rent, deposits, utilities, car repairs, etc.
- ✓ Register for food supports, such as grocery pantry, hot meals, Dining Room, Mobile Meals, etc.
- ✓ Assess and refer to other SH Programs, such as clothing, medical & dental care, shelter, etc.
- ✓ Largest service: Information and referral to partner agencies





# Children's Services



- **Kids Closet**

- ✓ Free clothing center to shop for children
- ✓ Seasonal & Holiday Programs: Books, backpacks, bikes & helmets, diapers, Christmas presents & food

- **Project Wee Care**

- ✓ Developing Empathy in our school aged youth – donating clothing and other items

- **Kids Meals**

- ✓ Snacks & lunches for school pantries, after-school and summer camp programs





# Samaritan House Free Clinics

We provide free health care services to those over the age of 18 who have no insurance. The clinics offer primary and specialty medical, dental, vision, and mental health care.



- 2 Locations: San Mateo & Redwood City
- Over 6,500 medical & dental patient visits provided per year
- Professional medical & dental direction
- Nearly 100 clinic volunteers
  - Volunteer health care workers & other professionals
  - Volunteer interpreters
  - Volunteer office staff
- **Don't forget the Food Pharmacy!**



# **ADDITIONAL SAMARITAN HOUSE PROGRAMS**

- **Coordinated Entry System**
  - 8 Core Agencies: Many Doors – One Process
- **Financial Empowerment**
  - Better Tomorrow
  - Free Tax Preparation Services
- **Shelter Services**
  - 3 Emergency Shelters : Safe Harbor, El Camino House & Pacific Inn
- **Worker Resource Center**
  - Connecting Labor & Business
- **Food Services, including:**  
Food Pantry, Dining Room, Mobile Meals, School Pantries, Senior Facilities, Shelter Programs, City & Partner Agencies Meal Support, Grocery Rescue, Food Pharmacy, and more...

**In fact: Over 4 million hot and cold meals were served  
ending fiscal year 2023!**



# City of Menlo Park Funds

## TOTAL FINANCIAL ASSISTANCE

(includes Menlo Park Funds, county funds, foundations, etc.)

|                                   |   |
|-----------------------------------|---|
| <b>Fiscal Year:</b>               | <b>July 1, 2022 – June 30, 2023</b>   |
| <b>Total Funds Provided:</b>      | <b>\$159,735</b>  |
| <b>Total Served:</b>              | <b>37 Households/91 Individuals</b>   |
| <b>Financial Assistance Type:</b> | <b>Rent, Deposit, Utilities, Home Repair, Car Repair, Shadow Debt, &amp; Mortgage</b> |

\*\*\*\*\*

## MENLO PARK FUND

|                                      |                                      |
|--------------------------------------|--------------------------------------|
| <b>Dates:</b>                        | <b>March 1, 2022-June 2023</b>       |
| <b>Total Fund Amount:</b>            | <b>\$220,000</b>                     |
| <b>Total Funds Provided to Date:</b> | <b>\$57,023</b> (balance: \$162,977) |
| <b>Total Served:</b>                 | <b>19 Households/55 Individuals</b>  |
| <b>Financial Assistance Type:</b>    | <b>Rent &amp; Deposit</b>            |



# ***Need Help? Need Information?***

**Samaritan House has helped break the cycle of poverty for almost 50 years.  
We give help *AND* hope!**

- **Call and leave a message. Calls are returned within one business day:**
  - **Samaritan House at 650-347-3648**
  - **Samaritan House South at 650-294-4312**
- **Visit us online at [www.samaritanhousesanmateo.org](http://www.samaritanhousesanmateo.org).**
- **Email us at [info@samaritanhousesanmateo.org](mailto:info@samaritanhousesanmateo.org).**
- **Visit our offices**
  - **4031 Pacific Blvd., San Mateo**
  - **1852 Bay Road, E. Palo Alto**
  - **1740 Marco Polo Way, Burlingame (afternoon hours only)**





## STAFF REPORT

### Housing Commission

Meeting Date:

8/3/2023

Staff Report Number:

23-005-HC

### Regular Business:

**Recommendation to appropriate \$4.18 million from the Below Market Rate (BMR) housing fund to three Notice of Funding Availability (NOFA) 2022 applicants to support affordable housing activities**

## Recommendation

Staff recommends the Housing Commission:

1. Recommend \$2 million from the BMR housing fund to Habitat for Humanity Greater San Francisco (HGSF) to support development of new affordable ownership housing units at 123 Independence Drive.
2. Recommend \$2 million from the BMR housing fund to MidPen Housing, Inc. (MidPen) to support development of new affordable rental housing at 795 Willow Road.
3. Recommend \$180,000 from the BMR housing fund to Rebuilding Together to support affordable housing preservation through rehabilitation of existing homeowner units in the Belle Haven neighborhood.

## Policy Issues

The Housing Commission makes BMR funding recommendations and the City Council retains sole discretion to award available BMR housing funds collected in accordance with Menlo Park Municipal Code Chapter 16.96.

## Background

On December 23, 2022, a NOFA of approximately \$2 million from the BMR housing fund was released to support the preservation or production of permanent affordable housing. Project eligibility requirements are outlined in the NOFA application document (Attachment A). As defined in section 14.3 of the City of Menlo Park BMR Guidelines, eligible projects include the preservation of existing affordable housing, acquisition or new construction of permanent affordable rental or ownership housing, and other activities to support housing for extremely low, very low or low-income households. Funding through the NOFA is intended to fill the financing gap between the projected total project costs and other available funding sources.

The City's BMR housing fund is a separate special fund, with no impact to the City's general fund. Revenue contributed to the BMR housing fund is primarily derived from fees collected from new development projects. Due to the high costs associated with housing production and preservation in the Bay Area, local affordable housing developers will utilize multiple funding sources to ensure proposed projects have adequate resources to advance with the project's construction. Due to available staffing resources in the Housing Division, both Housing staff and a consultant reviewed the NOFA applications before bringing a funding recommendation to the Housing Commission. The recommendation from the Housing Commission is then presented to the City Council for review and funding approval, which is anticipated in September 2023.



## Analysis

In January 2023, the City received four applications from established, experienced local nonprofit organizations, all whom meet the basic requirements and target the priority income groups. Table 1 summarizes these four applications.

| Table 1 – NOFA applications                            |  |                          |  |                  |                  |
|--|--|--------------------------|--|------------------|------------------|
| Organization   | Type of activity                       | Location                 | Description  | Subsidy per unit | Amount requested |
| Habitat for Humanity of Greater San Francisco ("HGSF") | New construction: BMR Ownership        | 123 Independence Dr.     | Development of 18 townhomes – low income (80% AMI or below)                                | \$111,111        | \$2,000,000      |
| HIP Housing  | New Construction: BMR Rental           | 1162 El Camino Real      | Development of 9 rental units -low income  | \$1,257,323      | \$11,300,000     |
| MidPen Housing, Inc. (MidPen)                          | New construction: BMR Rental           | 795 Willow Road          | Development of 62 rental units apartments for veterans - extremely low income and very low | \$32,258         | \$2,000,000      |
| Rebuilding Together Peninsula (RTP)                    | Preservation: Homeowner Rehabilitation | Belle Haven Neighborhood | Rehabilitate 8 homes owned by low income families  | \$22,500         | \$180,000        |
| Total requested  |  |                          |  |                  | \$15,480,000     |

All four organizations had the opportunity to present their proposals to the Housing Commission at the May and June commission meetings. Staff has reviewed their applications and they all meet the adopted BMR housing priorities outlined in the NOFA. The proposed projects are each consistent with goals, policies, and programs in the 2023-31 Housing Element and current General Plan. In particular, the new construction projects implement policies H2.1 (Maintenance, Improvement, and Rehabilitation of Existing Housing), H2.5 (Maintenance and Management of Quality Housing and Neighborhoods), H4.2 (Housing to Address Local Housing Needs), and program H2.C (Assist in Implementing Housing Rehabilitation Program), to meet the City's share of its Regional Housing Needs Allocation (RHNA).

Because these projects propose a range of affordable housing solutions, they vary in meeting the NOFA project priorities outlined in the NOFA and bulleted below. Attachment C includes additional details and a comparison.

- The project has reasonable costs, the ability to compete well in securing competitive funding sources, and is soundly underwritten.



- The project will allow the City to spend housing funds expeditiously, projects should be “ready to go” (priority to completion in 3 years).
- The project site allows development to achieve maximum density and is consistent with the applicable zoning.
- The project incorporates appropriate community spaces, amenities, and services for the target population.
- The project site is within walking distance of transit, services, and amenities and is convenient for the target population.
- The project is in central or west Menlo Park.
- The project contains larger units (2+ bedroom units and larger) and generally targets families.

The four applications are further described below and each of the proposals are included in Attachment B.

#### Habitat for Humanity - 123 Independence Drive

HGSF proposes to provide 18 affordable low-income ownership townhomes as part of a partnership with the Sobrato Organization who is proposing to redevelop an 8-acre office and industrial site into a mixed residential project consisting of 316 rental units and 116 ownership townhome units. The 18 affordable low-income ownership units are Sobrato’s required inclusionary obligation ( $15\% \times 116 = 17.4$ , or 18 units) for the ownership part of the project. However, this proposal targets lowering the household income level from the required moderate-income to low income for the ownership units.

Sobrato has agreed to donate the land, provide predevelopment costs including site infrastructure and planning costs, as well as a cash contribution of \$2 million, which results in about \$10 million total support from the developer. HGSF anticipates obtaining about \$5.7 million from state and local funding programs and expects to raise about \$2 million in private donations. The request for the City’s assistance is the anticipated gap of \$2 million. Although the number of affordable units matches the project’s inclusionary requirement, the plan to target the units to low income households instead of moderate-income households is a significant benefit. The low-income sales prices range from \$275,000-\$350,000 lower per unit (utilizing Menlo Park’s sales pricing methodology) than the target sales prices for moderate income households depending on the unit size.

#### HIP Housing - 1162 El Camino Real

HIP Housing proposes to provide nine low-income rental units. Prince Street Partners has approved plans to build nine apartment units at 1162 El Camino Real. The project includes six market rate units and three affordable units to fulfill the inclusionary obligation of one unit for the project itself and two units for the nearby mixed-use development project located at 506-556 Santa Cruz Avenue/1155 Merrill Street. Prince Street Partners is also exploring an alternative to meeting its BMR requirement with a donation of the land to the City or a 100% affordable project. This could fulfill the 2-unit inclusionary obligation, and HIP would work toward providing additional dwelling units and deeper affordability than required. This concept requires additional review by the City.

The only committed financing for the project is the land donation, which HIP estimates to be valued at \$3.4million, as well as the completed architectural plans. The financing challenge for this project is that there are few funding resources available for small projects. It is too small to be competitive for low-income tax credits or other state programs. The remaining gap for the project requested from the City is \$11.3 million, or about \$1.2 million per unit. The estimated development cost per unit, excluding land, is \$1,471,000. HIP has worked with a local contractor to look at lowering development costs by increasing the



number of units to 12 with slight modifications to the current plans, which would reduce the City subsidy to about \$927,000 per unit.

#### MidPen Housing Corporation - 795 Willow Road

Midpen's proposal would support the development of 62 rental units targeted to veterans and their families who are formerly or at risk of homelessness. Although this site is located in Menlo Park, it is owned by the U.S. Department of Veterans Affairs (VA) as part of its Veterans Affairs campus. Mid Pen was selected to develop this project by the VA through its Request for Qualifications in 2019. The site is technically not subject to the City's discretionary planning approvals; however MidPen intends to comply with the City's R-4-S zoning requirements in recognition of its location and connection to the surrounding community. The Planning Commission reviewed the proposal at a study session in May and the Community Development Director's designee determined it to be in substantial conformance with the City's R-4-S regulations.

MidPen anticipates that this project will score well in the competitive tax credit process and will spend the next 18 months applying for a variety of funding programs that have been identified. MidPen has recently applied to the State's Super NOFA funding for this project earlier in July. The land donation from the VA (\$7.3M) and \$500,000 in predevelopment funds from San Mateo County Affordable Housing Fund (AHF) are already committed. It is typical that the County provides major financial support after providing predevelopment funds to a project. MidPen is requesting \$2 million from the City, which equates to \$32,258 a unit as compared to the development cost of \$842,000 per unit excluding land.

#### Rebuilding Together Peninsula - Belle Haven Neighborhood

Rebuilding Together Peninsula (RTP) proposes to rehabilitate the homes of eight homeowners whose incomes range from extremely-low to low-income in the Belle Haven neighborhood. This free program repairs homes, primarily owned by seniors, allowing owners to age in place. Most homes need flooring repairs or replacement, as well as safety modifications and mobility enhancements. Energy efficiency items are included as appropriate. RTP has identified eight homeowners, verified their income and ownership, and developed a preliminary list of repairs for each property. Therefore, these projects are ready to go if funding is approved.

RTP's free home repair program has been in existence for many years. Typical RTP receives federal funding administered by the County of San Mateo, which results in about three projects consisting of minor repairs (less than \$10,000 home) per year in Menlo Park. This request to the City will allow more extensive repairs estimated at about \$22,500 per home for the eight homeowners in a timelier manner. If this funding is not provided or provided at a lesser level, the owners will need to wait for county funds and/or reduce the scope of repairs. Depending on the scope of work, these homeowners could also be referred to the newly approved zero interest loan program that will be managed by HHGSF under a separate agreement with the City of Menlo Park.

#### **BMR housing funds**

A summary of the current BMR housing fund balance is provided in the following table. At the time the NOFA was released approximately \$2 million in BMR funds were available. The City collected and received an additional \$5.4 million in fees since the receipt of applications. The estimated remaining balance following approval of the NOFA applicants as recommended is approximately \$4.3 million. A small portion of the BMR funds is budgeted annually to support staffing activities outlined in the BMR housing program guidelines. If the Housing Commission chooses to recommend funding three of the applications at the full amount of each request, an additional \$2,180,000 would be needed from the BMR housing fund.



| Table 2- Funding Information                           |  | 2023-24       |
|--|--|---------------|
| Estimated adjusted available balance at end FY 2022-23 |  | 13,968,645    |
| Habitat for Humanity – Preservation Program (approved) |  | (\$1,200,000) |
| Midpen -335 Pierce Road (on hold from Previous NOFA)   |  | (\$3,600,000) |
| Operating Budget FY 2023-24                            |  | (662,543)     |
| 2022-23 NOFA   |  | (\$2,000,000) |
| Additional needed for NOFA application                 |  | (\$2,180,000) |
| Estimated ending balance                               |  | \$4,326,102   |

## Summary

The Housing Commission shall consider and make a recommendation to the City Council regarding BMR funding for the above-mentioned projects, each of which addresses numerous City adopted goals. The initial funding available for this NOFA was \$2 million. However, since the City received an additional \$5.4 million in funds, staff is recommending the use of these additional funds to support the projects in a timely manner instead of reissuing a separate NOFA. The new construction projects planned by MidPen and HGSF are also relying on financial assistance from the County of San Mateo, and based on staff's prior experience, this funding source seems likely. Typically, when the County awards financing to housing projects, it expects to leverage its funds with local financial support to the extent possible.

Based on the information submitted and application of City goals and priorities, staff recommends the Housing Commission to approve following:

**Mid Pen Veterans Project** - Staff recommends \$2 million since this project is the most "ready to go" of the new construction projects and serves targeted populations and lower income households in the City. It meets most of the City priorities and leverages a substantial number of other funding sources, which are likely to be obtained.

**HGSF – 123 Independence Ownership Project** - This project meets several goals and anticipates a number of additional funding sources, including a substantial contribution from the private developer. Staff recommends supporting this project with \$2M, although the project is still under review with a tentative Planning Commission hearing date of August 14. Therefore, the funding for the project could be considered at a later time. That said, the Commission could recommend that the City Council award funds for this project contingent upon approval by the Planning Commission and City Council since additional BMR funds have been received since the NOFA was released. An early commitment for funding can assist the developer in obtaining other funding sources.

**Rebuilding Together Peninsula** -This project fills an unmet need for the lowest income homeowners and allows households to remain in their homes and community. The current free minor home repair program is not expected to assist many Menlo Park owners based on historical patterns and has limits on how many repairs can be covered. This program proposes to provide a greater range of repairs based on the identified needs of the qualified applicants (up to \$22,500), but not as extensive repairs as anticipated as



the new HHGSF Home Repair Loan program, which targets repairs in the \$40,000-75,000 range. Staff recommends funding this program at \$180,000, the full requested amount.

Staff recommends funding for three of the four proposals submitted as they were successful in addressing the City's affordable housing needs and priorities, and were determined to meet the eligibility requirements as identified in the NOFA. If approved for funding, these projects will ensure more affordable housing opportunities will become available in Menlo Park, increase BMR housing stock, and preserve existing housing that is affordable to the current lower income homeowners. The various types of housing activities proposed also allow the city to support a variety of affordable housing options for lower income households. Both HGSF and MidPen are mission driven non-profit affordable housing organizations with strong track records and many successful affordable housing projects in their portfolios. The proposed projects meet the city's requirements, as outlined in the NOFA eligibility requirements and the BMR Guidelines.

Although there is approximately \$4.3 million in the fund balance after funding three NOFA applications, staff recommends keeping a funding reserve for any future unforeseen situations and for potential over-the-counter funding application requests.

Staff is not recommending funding the HIP proposal at this time and deferring the review of this application for future consideration. The project has significant financing hurdles that cannot be solved with the amount of BMR funds currently available. Therefore, it would rely on future BMR funds to make it feasible, which is an unreliable source. Redesigning the project could provide additional community benefits of additional housing near transit and other services, but would add more time and total development costs to the current proposal. Staff will need to evaluate further the proposal for developer contribution of land as an acceptable alternative to constructing the off-site BMR units. Funding for a 100 percent affordable project with few units would also be an additional policy conversation with the City Council. Given the current priority of these funds to leverage other sources, be cost effective and provide housing quickly, staff does not recommend funding this project at this time.

### **Impact on City Resources**

There is no impact on the City's general fund. The \$4.18 million of funds recommended would come from the BMR housing fund to support these affordable housing activities in accordance with the requirements of the 2022 NOFA and BMR Guidelines.

### **Environmental Review**

This action is not a project within the meaning of the California Environmental Quality Act (CEQA) Guidelines §§ 15378 and 15061(b)(3) as it is will not result in any direct or indirect physical change in the environment. Any projects awarded funding will be conditional upon successful entitlement and required environmental reviews.

### **Public Notice**

Public notification was achieved by posting the agenda, with the agenda items being listed, at least 72 hours prior to the meeting.



**Attachments**

- A. Notice of Funding Availability (NOFA) application packet
- B. NOFA Applications received from Habitat for Humanity, HIP Housing, MidPen and Rebuilding together
- C. Summary of NOFA applications comparison

**Report prepared by:**

Eren Romero, Acting Housing Manager  
Sandy Council, Good City Consultants

**Report reviewed by:**

Deanna Chow, Assistant Community Development Director



# NOTICE OF FUNDING AVAILABILITY (NOFA)

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702



## Background

The City of Menlo Park announces the availability of funds for affordable housing projects in Menlo Park and seeks responsive proposals. Approximately \$1.5-2 million in Below Market Rate (BMR) housing funds are available under this NOFA to support the preservation or production of permanent affordable housing. The funding is intended to fill the financing gap between the projected total development costs and other available funding sources.

Qualified developers of affordable housing who meet the NOFA qualifications are encouraged to submit proposals. All proposals must be received no later than 2 p.m., Jan. 27, 2023. Interested parties may submit as an individual entity and/or may collaborate with other entities, so long as the collective group meets the NOFA requirements. Funding will be awarded by the City Council on a competitive basis to those projects that are most successful in addressing the City's affordable housing needs.

The City is seeking proposals demonstrating the following: an understanding of the community; the unique attributes and opportunities of the neighborhood where the project will be located; successful experience in developing and managing affordable housing; and a commitment to an inclusive and informative public engagement process. Applicants must have successfully completed prior affordable housing projects. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement.

Eligible projects include the preservation of existing affordable housing and the acquisition or new construction of permanent affordable rental or ownership housing for extremely low, very low and low-income households. Proposals from organizations that produce affordable housing through the administration of housing programs will also be considered, although BMR housing funds will be primarily limited to direct housing production (e.g., first-time homebuyer program, accessory dwelling unit loan program, acquisition of existing housing, etc.). The development of emergency shelters for the homeless and transitional housing is not eligible because they do not result in permanent affordable housing. Mixed-income projects containing both affordable and market-rate rental and ownership units are eligible, with only the affordable housing portion of the project eligible for assistance under this NOFA.

The City will evaluate proposals based on City Council-adopted project goals and housing priorities. All proposals will be reviewed for consistency with the Housing Element and the City's General Plan. There will not be a point system applied to these goals and priorities.

Funding priority will be given to applications received by the due date in this NOFA. If there are BMR funds available after the NOFA process, these funds will be available on an over-the-counter basis, subject to Housing Commission review and City Council approval.

## Request for proposals schedule

|                                    |                               |
|------------------------------------|-------------------------------|
| NOFA questions due:                | 2 p.m., Friday, Jan. 20, 2023 |
| NOFA applications due:             | 2 p.m., Friday, Jan. 27, 2023 |
| Housing Commission presentations:  | TBD, spring 2023              |
| Housing Commission recommendations | TBD, spring 2023              |
| City Council approvals:            | TBD, spring 2023              |

## Project priorities

To be considered for funding under this NOFA, the project should attempt to meet the following project priorities:

- Housing units will remain affordable through deed restrictions for at least 55 years.
- The project is consistent with the goals and objectives of the City's Housing Element and General Plan
- The project has reasonable costs, the ability to compete well in securing competitive fund sources, and is soundly underwritten.
- The project will allow the City to spend housing funds expeditiously, projects should be "ready to go."
- The project site allows a development to achieve maximum density and is consistent with the applicable zoning
- The project provides dual benefits by preserving/developing affordable housing and creating a substantial improvement of a blighted property and/or neighborhood.
- The building incorporates green building practices and materials.



- The project incorporates appropriate community spaces, amenities, and services for the target population.
- The project site is within walking distance of transit, services, and amenities and is convenient for the target population.
- The project will implement a Local Hire program for Menlo Park residents (via construction and/or operations) when applicable.
- The development team has demonstrated experience with successful affordable housing projects and the capacity to work cooperatively with communities in the design and development of projects.
- The project provides housing targeting very low and low-income households.
- The project is in central or west Menlo Park.
- The project contains larger units (2+ bedroom units and larger) and generally targets families.
- The project's management plan promotes a healthy living environment for tenants.

### **Review process**

#### Application review

Staff will review all proposals to verify applicant eligibility. Proposals from developers that do not meet the City's minimum required experience will not be considered. Incomplete proposals will not be considered.

Please note that the City aims to target BMR funds toward projects serving households at the lowest affordability levels. The City also intends to maximize the impact of its investment by awarding funds to projects requesting reasonable levels of subsidy, leveraged by other fund sources. So, in instances where there are multiple projects applying for funds, affordability targeting and subsidy level per unit will be considered.

#### Environmental review and assessment

Before the final funding commitment, projects must be assessed in accordance with the California Environmental Quality Act (CEQA). If Federal funding is involved, the project must also be assessed in accordance with the National Environmental Policy Act (NEPA).

### **Communications and questions**

The City of Menlo Park reserves the right to request additional information from applicants, reject any and all submittals, waive any irregularities in the submittal requirements or cancel, suspend or amend the provisions of this NOFA. If such an action occurs, the City will notify all interested parties in advance.

Should discrepancies or omissions be found in this RFP or should there be a need to clarify this RFP, questions or comments regarding this RFP must be put in writing and received by the City no later than 2 p.m., Friday, Jan. 20, 2023. Written questions may be submitted electronically through the city bid portal at [menlopark.gov/planetbids](http://menlopark.gov/planetbids) or via email to Interim Housing Manager Eren Romero at [eromero@menlopark.gov](mailto:eromero@menlopark.gov).

Responses from the City will be communicated in writing to all recipients of this RFP. All addenda shall become part of this RFP. The City shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by the City.

### **Application submittal requirements**

The NOFA application is completed entirely online and will close at 2 p.m., Jan. 27, 2023. Follow the steps below to create your vendor record, access all relevant NOFA information, and create and submit your online application and any attachments.

Step 1. Create a new vendor record, or access your existing record on PlanetBids, to initiate your NOFA application.

- Applicants who do not have a username password for the PlanetBids website may register for free by selecting "New Vendor Registration" at [menlopark.gov/planetbids](http://menlopark.gov/planetbids).

Step 2. Access the following NOFA information in PlanetBids:

The NOFA solicitation packet with instructions for accessing, completing and submitting the online NOFA application.

- General NOFA information, including updates and NOFA closing timelines; and
- All addenda (question-and-answer responses), including responses to requests for clarification or interpretation during the application period, which are regularly updated until the NOFA closes. Applicants should regularly visit the Vendor Portal to view updates.

Applications must be submitted by 2 p.m., Friday, Jan. 27, 2023, using the online vendor portal.

Please note - under the California Public Records Act, all documents submitted as part of this application are considered public records and will be made available to the public upon request.



## 2022-23 NOTICE OF FUNDING AVAILABILITY APPLICATION

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702

| Project applicant  |  |                                  |             |
|--|--|----------------------------------|-------------|
| Organization/Agency:   |  |                                  |             |
| Primary contact person:  |  |                                  |             |
| Phone:   |  | Email:                           |             |
| Address:   |  | City:                            | State: Zip: |
| <p>1. What is the role of the applicant in the project (check all that apply):</p> <p><input type="checkbox"/> Ownership entity</p> <p><input type="checkbox"/> Managing partner or managing member</p> <p><input type="checkbox"/> Sponsoring organization</p> <p><input type="checkbox"/> Developer</p> <p><input type="checkbox"/> Other (describe):</p> <p>2. Applicant legal status:</p> <p><input type="checkbox"/> General partnership</p> <p><input type="checkbox"/> Joint venture</p> <p><input type="checkbox"/> Limited partnership corporation</p> <p><input type="checkbox"/> Nonprofit organization</p> <p><input type="checkbox"/> Other (please specify):</p> <p>3. Organization status:</p> <p><input type="checkbox"/> Currently exists</p> <p><input type="checkbox"/> To be formed (estimated date):</p> <p>4. Name(s) of individuals who are/will be general partner(s) or principal owner(s):</p> <p>If the applicant is a joint venture, a joint venture agreement is required that clearly describes the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.</p> |  |                                  |             |
| Project detail   |  |                                  |             |
| Project name:  |  |                                  |             |
| Project address:   |  | City:                            | State: Zip: |
| Assessor's parcel number:  |  |                                  |             |
| <p>Project type (check all that apply):</p> <p><input type="checkbox"/> Families</p> <p><input type="checkbox"/> Seniors</p> <p><input type="checkbox"/> Special needs</p> <p><input type="checkbox"/> Other (please describe):</p>  |  |                                  |             |
| <p>Project activity (check all that apply):</p> <p><input type="checkbox"/> Acquisition</p> <p><input type="checkbox"/> Rehabilitation</p> <p><input type="checkbox"/> New construction</p> <p><input type="checkbox"/> Preservation</p> <p><input type="checkbox"/> Mixed-income</p> <p><input type="checkbox"/> Mixed-use</p> <p><input type="checkbox"/> Other (please specify):</p>  |  |                                  |             |
| Land area:   |  | Number of residential buildings: |             |



|  |                                     |      |      |      |                            |                     |      |      |      |      |
|--|-------------------------------------|------|------|------|----------------------------|---------------------|------|------|------|------|
| Number of units:   | Residential total floor area:       |      |      |      |                            |                     |      |      |      |      |
| Number of stories:   | Number of elevators:                |      |      |      |                            |                     |      |      |      |      |
| Number of community rooms:   | Community room(s) total floor area: |      |      |      |                            |                     |      |      |      |      |
| Commercial/office uses (please specify):   |                                     |      |      |      |                            |                     |      |      |      |      |
| Commercial total floor area:   |                                     |      |      |      | Office total floor area:   |                     |      |      |      |      |
| Other uses (please specify):   |                                     |      |      |      |                            |                     |      |      |      |      |
| Total parking spaces:  |                                     |      |      |      | Parking type(s):           |                     |      |      |      |      |
| Residential parking spaces:  |                                     |      |      |      | Residential parking ratio: |                     |      |      |      |      |
| Guest parking spaces:  |                                     |      |      |      |                            |                     |      |      |      |      |
| Commercial parking spaces:   |                                     |      |      |      | Commercial parking ratio:  |                     |      |      |      |      |
| Office parking spaces:   |                                     |      |      |      | Office parking ratio:      |                     |      |      |      |      |
| <b>Income categories</b>   |                                     |      |      |      |                            |                     |      |      |      |      |
| City BMR funds may only fund units serving extremely low, very low or low income households at or below 80% of the area median income (AMI). Inclusions of units for homeless households are encouraged. |                                     |      |      |      |                            |                     |      |      |      |      |
| Category   | Number of units                     |      |      |      |                            | Percentage of units |      |      |      |      |
|  | Studio                              | 1 bd | 2 bd | 3 bd | 4 bd                       | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| 0 to 30% AMI – Extremely low   |                                     |      |      |      |                            |                     |      |      |      |      |
| 31 to 50% AMI – Very low   |                                     |      |      |      |                            |                     |      |      |      |      |
| 51 to 80% AMI – Low  |                                     |      |      |      |                            |                     |      |      |      |      |
| 81 to 120% AMI – Moderate  |                                     |      |      |      |                            |                     |      |      |      |      |
| Unrestricted   |                                     |      |      |      |                            |                     |      |      |      |      |
| TOTAL  |                                     |      |      |      |                            |                     |      |      |      |      |
|  |                                     |      |      |      |                            |                     |      |      |      |      |
| What is your existing total BMR obligation by unit type?   |                                     |      |      |      |                            |                     |      |      |      |      |
| Category   | Number of units                     |      |      |      |                            | Percentage of units |      |      |      |      |
|  | Studio                              | 1 bd | 2 bd | 3 bd | 4 bd                       | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| BMR Obligation   |                                     |      |      |      |                            |                     |      |      |      |      |



**Unit amenities**

Provide a brief list of unit amenities (e.g., air conditioning, laundry in unit, balconies, etc.):

**Project narrative (please attach any additional responses)**

1. Project description: Provide a brief narrative summary of the proposed project including location, project type (e.g., new versus rehab), target population and any unique project characteristics.
2. Project design: Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.
3. Green building features: Describe the green building features that will be incorporated into the project.
4. On-site amenities: Describe any on-site amenities including any project characteristics that address the special needs of the population you intend to serve.
5. Neighborhood off-site amenities: Describe the property location, neighborhood transportation options, and local services and amenities that are within 1/4 mile and 1/2 mile of the site.



6. Potential development obstacles: Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below including an outline of steps that will be taken and the time needed to resolve these issues.

**Site information (please attach any additional responses)**

Site control is required. Evidence should also be submitted demonstrating that the entity that has site control is the same entity applying for funds. Please include the site control document with the application.

What type of site control does the applicant currently hold?

Will site acquisition be a purchase or long-term lease?

What is the purchase price of the land? For proposed leaseholds, indicate the amount of the annual lease payment and the basis for determining that amount:

What is the current County-assessed value of the site?

Who is the current property owner and what is their address and contact information?

Total square footage of site:

Existing uses on the site and the approximate square footage of all structures:

Planned use of on-site existing structures:

- ☐ Demolish  
☐ Rehabilitate  
☐ Other (describe):

Provide the square footage, date built and number of stories for each on-site building to be retained as part of this project:

Provide a brief description of the condition of any buildings to be rehabilitated:



Describe unique site features (heritage trees, parcel shape, etc.)

Identify problem site conditions (high noise levels, ingress/egress issues, etc.)

### **Floodplain**

Is the site in a floodplain?   ☐ Yes   ☐ No

If yes, type of flood plain and number of years:

List any maps referenced:

### **Describe adjoining land uses**

West:

East:

North:

South:

### **Zoning**

What is the current zoning of the project site?

Is the proposed project consistent with the existing zoning of the site?   ☐ Yes   ☐ No

Explain:

Indicate any discretionary review permits required for the project (e.g., planned community permits, design review permits, rezoning, etc.)







Please describe two projects completed in the last 10 years that are similar to the proposed project and provide photographs of each project:

**Project 1 – Project name:**

Location:

Number of units:

Type of development (senior, family, etc.):

Name of project manager:

Number of stories:

Unit types (studio, 1 bedroom, etc.):

Type of construction:

Project amenities:

Entitlement date:

Occupancy date:

Funding sources:

**Project 2 – Project name:**

Location:

Number of units:

Type of development (senior, family, etc.):

Name of project manager:

Number of stories:

Unit types (studio, 1 bedroom, etc.):

Type of construction:

Project amenities:

Entitlement date:

Occupancy date:

Funding sources:



| Personnel  |      |                          |   |                           |
|--|------|--------------------------|---|---------------------------|
| List the names of key members of the applicant's development team, their titles, responsibilities and years of experience in affordable housing.   |      |                          |   |                           |
| Project Staff  | Name | Role in proposed project | Years of housing development experience | Years with this developer |
| Project manager  |      |                          |   |                           |
| Director of real estate development  |      |                          |   |                           |
| Executive director   |      |                          |   |                           |
| Chief financial officer  |      |                          |   |                           |
| Other  |      |                          |   |                           |
| Other  |      |                          |   |                           |
| Indicate which of the following development team members have been selected and identify them if different from applicant.   |      |                          |   |                           |
| Developer:   |      | Architect(s):            |   |                           |
| Engineer(s):   |      | General contractor:      |   |                           |
| Attorney(s) and/or tax professionals   |      |                          |   |                           |
| Property management agent  |      |                          |   |                           |
| Financial and other consultant(s)  |      |                          |   |                           |
| Investor(s):   |      |                          |   |                           |
| List all other participants and affiliates (people, businesses and organizations) proposing to participate in the project.   |      |                          |   |                           |
| Name   |      | Address                  |   |                           |
|  |      |                          |   |                           |
|  |      |                          |   |                           |
|  |      |                          |   |                           |
|  |      |                          |   |                           |
|  |      |                          |   |                           |
| Describe how the property will be managed including the number of staff, locations and management office hours.  |      |                          |   |                           |
| If the project will be managed by an agency other than the project applicant describe the project applicant's role in the ongoing management of the project and resolution of management issues. |      |                          |   |                           |



### Applicant certification

I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and or information herein are found to be misrepresented it shall constitute grounds for disqualification of my proposal. I further certify that the following statements are true except if I have indicated otherwise on this certification:

- ☐ I have not sold any of the projects listed on the 10 Year Projects list
- ☐ No mortgage on a project listed by me has ever been in default
- ☐ Government, or foreclosed, nor has mortgage relief by the mortgagee been given
- ☐ I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list
- ☐ To the best of my knowledge there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past 10 years
- ☐ I have not been suspended, been barred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs
- ☐ I have not failed to use state funds or LIHTC allocated to me in any state

I have checked each deletion, if any, and have attached a true and accurate signed statement, if applicable; to explain the facts and circumstances that I think help to qualify me as a responsible principal for participation in this NOFA.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Title

This application and all supporting material are regarded as public records under the California Public Records Act.



### Applicant supporting material

In addition to submitting a complete application, the following additional supporting material must be provided with the application:

1. Cover letter: Provide a brief summary of the proposed project and discuss your agency's qualifications and why your proposal should be selected for funding.
2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.
3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.
4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.
5. Experience (owner/developer and property manager): Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.
6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.
7. Financial proforma: Please provide detailed financial information for the proposed project including permanent and construction fund sources, detailed permanent development budget, unit affordability mix/rent schedule, operating budget and 30-year cash flow. If the project will use tax credits, please provide the tax credit calculations.
8. Photos: Attach recent clearly labeled photos of the project site and surrounding area.
9. Board of directors: Provide a listing of the board of directors including the city of residence.



**2022-23 NOTICE OF FUNDING AVAILABILITY APPLICATION**

Community Development – Housing Division  
 701 Laurel St., Menlo Park, CA 94025  
 tel 650-330-6702

| Project applicant   |  |                                    |                      |
|---|--|------------------------------------|----------------------|
| Organization/Agency: Habitat for Humanity Greater San Francisco, Inc.   |  |                                    |                      |
| Primary contact person: Maureen Sedonaen  |  |                                    |                      |
| Phone: 415-625-1000   |  | Email: msedonaen@habitatgsf.org    |                      |
| Address: 300 Montgomery Street, Suite 450   |  | City: San Francisco                | State: CA Zip: 94104 |
| 1. What is the role of the applicant in the project (check all that apply):<br><input type="checkbox"/> Ownership entity<br><input type="checkbox"/> Managing partner or managing member<br><input type="checkbox"/> Sponsoring organization<br><input checked="" type="checkbox"/> Developer<br><input type="checkbox"/> Other (describe):                     |  |                                    |                      |
| 2. Applicant legal status:<br><input type="checkbox"/> General partnership<br><input type="checkbox"/> Joint venture<br><input type="checkbox"/> Limited partnership corporation<br><input checked="" type="checkbox"/> Nonprofit organization<br><input type="checkbox"/> Other (please specify):  |  |                                    |                      |
| 3. Organization status:<br><input checked="" type="checkbox"/> Currently exists<br><input type="checkbox"/> To be formed (estimated date):  |  |                                    |                      |
| 4. Name(s) of individuals who are/will be general partner(s) or principal owner(s):<br>Habitat for Humanity Greater San Francisco, Inc.   |  |                                    |                      |
| If the applicant is a joint venture, a joint venture agreement is required that clearly describes the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.  |  |                                    |                      |
| Project detail  |  |                                    |                      |
| Project name: Habitat Independence Drive  |  |                                    |                      |
| Project address: 123 Independence Drive   |  | City: Menlo Park                   | State: CA Zip: 94025 |
| Assessor's parcel number: 055-236-140 & 055-236-240   |  |                                    |                      |
| Project type (check all that apply):<br><input checked="" type="checkbox"/> Families<br><input type="checkbox"/> Seniors<br><input type="checkbox"/> Special needs<br><input checked="" type="checkbox"/> Other (please describe): Affordable First-Time Homeownership for Low-Income Families  |  |                                    |                      |
| Project activity (check all that apply):<br><input type="checkbox"/> Acquisition<br><input type="checkbox"/> Rehabilitation<br><input checked="" type="checkbox"/> New construction<br><input type="checkbox"/> Preservation<br><input type="checkbox"/> Mixed-income<br><input type="checkbox"/> Mixed-use<br><input type="checkbox"/> Other (please specify): |  |                                    |                      |
| Land area: 0.61 acres   |  | Number of residential buildings: 2 |                      |



|  |  |      |      |      |                                     |                     |      |      |      |      |
|--|--|------|------|------|-------------------------------------|---------------------|------|------|------|------|
| Number of units: 18  | Residential total floor area: 25,281 sq ft |      |      |      |                                     |                     |      |      |      |      |
| Number of stories: 3   | Number of elevators: 0                     |      |      |      |                                     |                     |      |      |      |      |
| Number of community rooms: 0   | Community room(s) total floor area: N/A    |      |      |      |                                     |                     |      |      |      |      |
| Commercial/office uses (please specify): N/A   |  |      |      |      |                                     |                     |      |      |      |      |
| Commercial total floor area: N/A   |  |      |      |      | Office total floor area: N/A        |                     |      |      |      |      |
| Other uses (please specify): N/A   |  |      |      |      |                                     |                     |      |      |      |      |
| Total parking spaces: 18   |  |      |      |      | Parking type(s): individual garages |                     |      |      |      |      |
| Residential parking spaces: 18   |  |      |      |      | Residential parking ratio: 1:1      |                     |      |      |      |      |
| Guest parking spaces: 0  |  |      |      |      |                                     |                     |      |      |      |      |
| Commercial parking spaces: 0   |  |      |      |      | Commercial parking ratio: N/A       |                     |      |      |      |      |
| Office parking spaces: 0   |  |      |      |      | Office parking ratio: N/A           |                     |      |      |      |      |
| <b>Income categories</b>   |  |      |      |      |                                     |                     |      |      |      |      |
| City BMR funds may only fund units serving extremely low, very low or low income households at or below 80% of the area median income (AMI). Inclusions of units for homeless households are encouraged.                 |  |      |      |      |                                     |                     |      |      |      |      |
| Category   | Number of units                            |      |      |      |                                     | Percentage of units |      |      |      |      |
|  | Studio                                     | 1 bd | 2 bd | 3 bd | 4 bd                                | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| 0 to 30% AMI – Extremely low   |  |      |      |      |                                     |                     |      |      |      |      |
| 31 to 50% AMI – Very low   |  |      |      |      |                                     |                     |      |      |      |      |
| 51 to 80% AMI – Low  |  |      | 3    | 6    | 9                                   |                     |      | 17%  | 33%  | 50%  |
| 81 to 120% AMI – Moderate  |  |      |      |      |                                     |                     |      |      |      |      |
| Unrestricted   |  |      |      |      |                                     |                     |      |      |      |      |
| TOTAL  |  |      | 3    | 6    | 9                                   |                     |      | 17%  | 33%  | 50%  |
| What is your existing total BMR obligation by unit type?   |  |      |      |      |                                     |                     |      |      |      |      |
| 15% of units in the collective project must be affordable to BMR households, with no distinction for unit type/bedroom count. This project proposes an additional 8 low-income units, making the project 17% affordable. |  |      |      |      |                                     |                     |      |      |      |      |
| Category   | Number of units                            |      |      |      |                                     | Percentage of units |      |      |      |      |
|  | Studio                                     | 1 bd | 2 bd | 3 bd | 4 bd                                | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| BMR Obligation   |  |      |      |      |                                     |                     |      |      |      |      |



### Unit amenities

Provide a brief list of unit amenities (e.g., air conditioning, laundry in unit, balconies, etc.):

To meet the growing need for family housing all units at Habitat Independence Drive will be family-sized, with three 2-bedroom units, six 3-bedroom units, and nine 4-bedroom units. Each unit will have a private single car garage, in-unit laundry, and at least one ground floor bedroom. Most units also have a private balcony, and all will have solar panels.

### Project narrative (please attach any additional responses)

1. Project description: Provide a brief narrative summary of the proposed project including location, project type (e.g., new versus rehab), target population and any unique project characteristics.

Habitat for Humanity Greater San Francisco (HGSF) is partnering with a private developer to build 18 townhomes in Menlo Park to be sold affordably to low-income, qualified, first-time homebuyers with no down payment and zero interest mortgage loans. HGSF will act as the developer, general contractor, and homeowner sales and outreach coordinator using our highly trained staff, volunteer workforce, and hired trade professionals to build the highest quality affordable housing community.

The 18 affordable townhomes will be located at 123 Independence Drive and are part of a larger, new, master planned community that contains a mix of townhomes and apartments. The community is located between Independence Drive, Chrysler Drive, and Constitution Drive. Per Menlo Park Municipal Code, Below Market Rate Housing Program, and BMR Guidelines, the developer is required to provide 15% of the total units as affordable to BMR households. The project team proposes an additional 8 low-income units, making the project 17% affordable. Delivering 17% of the total master plan units as affordable for households earning up to 80% AMI qualified the project for two waivers under the State Density Bonus Law. The two waivers targeted by the project team include 1) clustering the affordable homes on one lot, and 2) allowing flexibility on timing of the affordable townhomes compared to the market rate townhomes.

HGSF's 18 affordable townhomes are family-sized with three 2-bedroom units, three 6-bedroom units, and 9 4-bedroom units. All Habitat homes will be sold to families earning up to 80% AMI with a housing cost of no more than 30% of household income. Homebuyers will participate in Habitat's sweat equity program, helping to build their homes and those of their neighbors, and will receive extensive homebuyer education on topics including financial planning and home maintenance.

2. Project design: Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.

The 18 affordable Habitat townhomes will be centrally located within the larger, master planned community, adjacent to a green space paseo that runs the length of the project. The site is in a flood zone and will be raised several feet.

To meet the growing need for family housing all Habitat units will be family-sized, with three 2-bedroom units, six 3-bedroom units, and nine 4-bedroom units. The community features bicycle parking and open green space with seating areas and a playground.

Each unit will have a private single car garage, in-unit laundry, and at least one ground floor bedroom. Most units also have a private balcony, and all will have solar panels.

3. Green building features: Describe the green building features that will be incorporated into the project.

All new HGSF homes are built with sustainability in mind – HGSF strives to build homes that are healthy, feature low utility bills, and are durable for future homeowners. Through our design and construction methods, we also aim to reduce our impact on the environment. We are targeting to have Habitat Independence Drive certified in the GreenPoint Rating system. We also aim to certify the project through the Department of Energy's Zero Energy Ready program, which includes the Energy Star and Indoor Air Plus systems. To achieve this certification, a 3rd party inspector will review our plans and certify the homes are built to meet all aspects of these programs.

Sustainability features currently under consideration include rooftop solar panels to offset homeowner energy



consumption, advanced insulation packages to reduce heating & cooling demands, an Energy Recovery Ventilation system that introduces constant fresh air into the home to ensure a healthy indoor air quality, low-emitting finishes that reduce pollutants in the home, durable materials that reduce long term replacement costs, LED lighting package to keep energy bills low, low-use water fixtures to help keep water utility bills low, and high performing windows.

4. On-site amenities: Describe any on-site amenities including any project characteristics that address the special needs of the population you intend to serve.

To meet the growing need for family housing all units at Habitat Independence Drive will be family-sized, with three 2-bedroom units, six 3-bedroom units, and nine 4-bedroom units. The community features bicycle parking and open green space with seating areas and a playground.

5. Neighborhood off-site amenities: Describe the property location, neighborhood transportation options, and local services and amenities that are within 1/4 mile and 1/2 mile of the site.

Habitat Independence Drive is approximately one mile from Bedwell Bayfront Park which features abundant hiking/walking trails and bay views. Other amenities within approximately one mile include:

- M3-Marsh Road free commuter shuttle which runs to the Menlo Park Caltrain station
- Hotel Nia
- Bayfront Fitness
- Synergy Badminton Club
- Menlo Supply plumbing supply store
- TIDE Academy of Sequoia Union High School District
- Taft Elementary School
- FedEx Ship Center
- Tyson Kennels pet boarding service
- Little Blessings Daycare
- Gina's Daycare
- Chevron gas station
- USPS office
- Stanford Children's Health medical offices
- Starbucks coffee
- Freewheel Brewing Company
- Delucchi's Market
- Numerous corporate offices



6. Potential development obstacles: Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below including an outline of steps that will be taken and the time needed to resolve these issues.

Entitlements are currently in the approval process and thus have the potential to create project delays. We are also still nailing down the entitlement schedule.

**Site information (please attach any additional responses)**

Site control is required. Evidence should also be submitted demonstrating that the entity that has site control is the same entity applying for funds. Please include the site control document with the application.

What type of site control does the applicant currently hold?

Letter of Intent (LOI)

Will site acquisition be a purchase or long-term lease?

The site will be donated, and title will be transferred to HGSE.

What is the purchase price of the land? For proposed leaseholds, indicate the amount of the annual lease payment and the basis for determining that amount:

The land will be donated to Habitat at zero cost by our private developer partner.

What is the current County-assessed value of the site?

The site does not have a recent appraisal. The existing larger site will be split into new, separate parcels and will be reappraised at that time.

Who is the current property owner and what is their address and contact information?

HGSE is under an NDA with the current property owner and will share this information once the NDA is released.

Total square footage of site: 26,572 SF (0.61 acres)

Existing uses on the site and the approximate square footage of all structures:

Existing, vacant commercial buildings

Planned use of on-site existing structures:

☒ Demolish

☐ Rehabilitate

☐ Other (describe):

Provide the square footage, date built and number of stories for each on-site building to be retained as part of this project:

No buildings on the site will be retained.



Provide a brief description of the condition of any buildings to be rehabilitated:

No buildings on the site will be rehabilitated



Describe unique site features (heritage trees, parcel shape, etc.)

The site is in a 100-year flood plain and will need to be raised. HGSF's developer partner has additionally submitted a request for a heritage tree removal permit.

Identify problem site conditions (high noise levels, ingress/egress issues, etc.)

Habitat Independence Drive is located one block from Highway 101 in the middle of the Marsh Road-area business park which could lead to high noise levels. While the collective project will create a strong sense of community, it is removed from other parts of the community like shopping and medical centers with limited public transportation options.

### Floodplain

Is the site in a floodplain? ☒ Yes ☐ No

If yes, type of flood plain and number of years: 100-year floodplain

List any maps referenced:

FEMA Flood Map

### Describe adjoining land uses

West: Marsh Road (main thoroughfare), Office Buildings, Apartments

East: Office Buildings

North: Office Buildings, Highway 84 Bayfront Expressway, Bedwell Bayfront Park, San Francisco Bay

South: Office Buildings, Hotel, Highway 101 Bayshore Freeway

### Zoning

What is the current zoning of the project site? R-MU-Bonus (Residential Mixed Use, Bonus)

Is the proposed project consistent with the existing zoning of the site? ☒ Yes ☐ No

Explain:

The site is currently zoned for residential, which is the proposed use of the project.

Indicate any discretionary review permits required for the project (e.g., planned community permits, design review permits, rezoning, etc.)

The project requires approval of the Final Environmental Impact Report ("FEIR") and the Conditions of Approval to secure the entitlements. The approval process includes review and recommendation by the Housing Commission and Planning Commission and then final approval by the City Council. The schedule for the approval process is still being developed.



If rezoning is required identify the requested zoning district for the project: N/A

**Community priorities (please attach any additional responses)**

Explain how this project meets the objectives of the project priorities identified in this NOFA and the goals and objectives of the City's Housing Element and General Plan:

Habitat Independence Drive meets most of the NOFA's project priorities. HGSF has extensive experience developing new, affordable homes for low-income, first-time homeowners in San Mateo County, with two new developments completed in just the last year. All Habitat projects follow fair housing and affirmative marketing practices. To ensure the project remains affordable for at least 55 years, each unit will be deed restricted for low-income homebuyers and will comply with applicable requirements under law for affordable for-sale units. The project brings much needed affordable housing to a growing part of town and incorporates significant green building practices to ensure the homes are healthy, durable, and have low utility bills. The large units and common green space allow families and the Habitat community to grow and thrive.

**Project funding (please attach any additional responses)**

City funds requested: \$2,000,000

Funds per assisted unit: \$115,000

Total project cost: \$19,303,560

Cost per assisted unit: \$1,072,420

How will the requested City funding be used? City funding will help cover predevelopment and construction costs.

Assess the chances of the project securing required funding and steps that will be taken to make the project competitive.

For Habitat Independence Drive, we are currently targeting numerous public sources of funding totaling approximately \$7 million. These sources include San Mateo County Affordable Housing Funds, HOME, Federal Home Loan Bank of San Francisco Affordable Housing Program, the California Energy Commissions BUILD program, and the State's Department of Housing and Community Development CalHome Mortgage Assistance program. We are continually pursuing additional sources, particularly those related to sustainability as we strive to build the greenest homes possible. We have years of experience with all these sources and are confident we will be competitive and receive awards.

In addition to public subsidy, the project is currently targeting approximately \$2 million in private donations from individual donors, corporate sponsors, and foundations. HGSF has a deep pool of supporters in San Mateo County and is confident the Fund Development team will meet or exceed the \$2 million target.

The project proforma is tracking up to \$10 million in support, to include the value of the donated land and improvements as well as a financial contribution, from our private developer partner. The last piece of our funding stack will be mortgage revenue. As the lender, HGSF can use issued mortgages to help finance and fund our projects. After a home sale, HGSF collects monthly receipts from the affordable mortgage, or can monetize that mortgage through a bank purchase or financial transaction as needed.

Throughout the project, HGSF will monitor potential construction cost escalation and supply chain challenges for building materials and interior finishes. HGSF is conservative in estimating the construction costs, as evidenced by providing for inflation of costs over the construction period and regularly conferring with HGSF Board members (who are private sector housing developers) about market conditions. HGSF also plans to order materials in advance as needed to mitigate the supply chain challenges faced by many developers and take other necessary steps to keep costs reasonable. Another way our team works to keep costs under control is by securing donated materials, labor, and professional services (in-kinds services and reduced billing rates for example). We maintain the flexibility to readjust targets for such donations to maintain the project budget.

OPTIONAL: What is the self-scored 9% tax credit tiebreaker score for the project? (Please note that you may be required to provide this during the application review) N/A

**Developer experience (please attach any additional responses)**



Applicants may be nonprofit or for-profit affordable housing developers or owners who have affordable housing experience in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda and Santa Clara) and a successful track record of at least two years of ownership of at least two affordable, deed-restricted housing projects within the nine-county Bay Area in which 100% of the units, are targeted to those at or below 80% AMI. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement. Previous development/ownership experience must include projects that contain at least 10 units.

Years of experience: 34 years

Number of projects: 9 (HGSF has completed many more than 9 projects, but most have fewer than 10 units)

Number of projects in San Mateo County: 5

Average size of projects: 19.8 units

Number of units placed in service: 278



|  |
|--|
| Please describe two projects completed in the last 10 years that are similar to the proposed project and provide photographs of each project:  |
| <b>Project 1 – Project name:</b>   |
| Location: 3001 Geneva Ave, Daly City, CA 94014 (Geneva Village)  |
| Number of units: 6   |
| Type of development (senior, family, etc.): Affordable First-Time Homeownership for Low-Income Families  |
| Name of project manager: Doug Fowler, Habitat for Humanity Greater San Francisco, Inc.   |
| Number of stories: 3   |
| Unit types (studio, 1 bedroom, etc.): 3 bedroom, 1.5 bath townhomes  |
| Type of construction: wood frame   |
| Project amenities: Each unit at Geneva Village has a single car garage, in-unit laundry, roof top solar, and exclusive use rear yard.  |
| Entitlement date: 06/24/2019   |
| Occupancy date: 02/04/2022   |
| Funding sources: CalHome Mortgage Assistance, San Mateo County Affordable Housing Funds, City of Daly City Affordable Housing Funds  |
| <b>Project 2 – Project name:</b>   |
| Location: 612 Jefferson Ave, Redwood City, CA 94063  |
| Number of units: 20  |
| Type of development (senior, family, etc.): Affordable First-Time Homeownership for Low-Income Families  |
| Name of project manager: Doug Fowler, Habitat for Humanity Greater San Francisco, Inc.   |
| Number of stories: 6   |
| Unit types (studio, 1 bedroom, etc.): 1, 2, & 3 bedroom, 1 bath condos   |
| Type of construction: wood frame over concrete podium  |
| Project amenities: Ground level parking garage with car stacker, elevator, rooftop solar.  |
| Entitlement date: summer 2018  |
| Occupancy date: 04/26/2022   |
| Funding sources: CalHome Mortgage Assistance, San Mateo County Affordable Housing Funds, San Mateo County CDBG, HEART of San Mateo County, Redwood City CDBG, Redwood City Affordable Housing Funds, Redwood City HOME |



| Personnel   |   |   |   |                           |
|---|---|---|---|---------------------------|
| List the names of key members of the applicant's development team, their titles, responsibilities and years of experience in affordable housing.  |   |   |   |                           |
| Project Staff   | Name  | Role in proposed project  | Years of housing development experience | Years with this developer |
| Project manager   | Monica Melkesian, Sr. Project Manager             | Leading project entitlements along with private developer partner, design & a team of consultants, budget, and sales                        | 30                                      | 1.5                       |
| Director of real estate development   | Constanza Asfura-Heim, VP Real Estate Development | Oversight of all new Habitat developments, including entitlements and holding relationship with development partner.                        | 20                                      | 2                         |
| Executive director  | Maureen Sedonaen, CEO                             | Maintaining development pipeline, securing private financial support, holding relationship with development partner                         | 6+                                      | 6                         |
| Chief financial officer   | Jen Wilds, CFO                                    | Oversight of organization-wide finances, including working with Sr. Project Manager & VP Real Estate to maintain project budget             | 10+                                     | 6                         |
| Other   | Jim Feely, VP Construction                        | Oversight of all components of construction from project design through handover to homebuyers  | 30                                      | 1                         |
| Other   | Angelica Resendez, VP Homeowner Services          | Managing relationships with candidate homebuyers and existing Habitat homeowners; leading home sales and all policies related to homeowners | 9                                       | 9                         |
| Indicate which of the following development team members have been selected and identify them if different from applicant.  |   |   |   |                           |
| Developer: Habitat for Humanity Greater San Francisco   |   | Architect(s): not yet selected  |   |                           |
| Engineer(s): not yet selected   |   | General contractor: Habitat for Humanity Greater San Francisco  |   |                           |
| Attorney(s) and/or tax professionals: Goldfarb & Lipman   |   |   |   |                           |
| Property management agent: A property management company will be selected during construction to guide the future HOA, including providing ongoing homeowner education.                 |   |   |   |                           |
| Financial and other consultant(s): Additional consultants not yet selected  |   |   |   |                           |
| Investor(s): HGSF expects multiple sources of private funding, including foundations, corporations, and private individuals. Fundraising will occur throughout the life of the project. |   |   |   |                           |
| List all other participants and affiliates (people, businesses and organizations) proposing to participate in the project.  |   |   |   |                           |
| Name  |   | Address   |   |                           |
| Private developer partner   |   | Will share once NDA is released   |   |                           |
|   |   |   |   |                           |
|   |   |   |   |                           |
|   |   |   |   |                           |
|   |   |   |   |                           |



Describe how the property will be managed including the number of staff, locations and management office hours.

Once unit construction is underway and prior to home sales, HGSF will hire an external, off-site management company to properly maintain and manage the development after occupancy. This property management company will provide education to homeowners throughout their homeownership journeys. HGSF has developed relationships with numerous management companies over the years and will select one with strong experience and reputation to guide Habitat Independence Drive.

If the project will be managed by an agency other than the project applicant describe the project applicant's role in the ongoing management of the project and resolution of management issues.

As the developer, HGSF will establish the Homeowners Association (HOA), draft and record CC&R's, Articles of Incorporation, and Association Bylaws, develop a preliminary HOA budget, and train new homebuyers as to the requirements and responsibilities of being a part of a HOA. Once unit construction is underway and prior to home sales, HGSF will hire an external, off-site management company to properly maintain and manage the development after occupancy.



### Applicant certification

I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and or information herein are found to be misrepresented it shall constitute grounds for disqualification of my proposal. I further certify that the following statements are true except if I have indicated otherwise on this certification:

☒ I have not sold any of the projects listed on the 10 Year Projects list

☒ No mortgage on a project listed by me has ever been in default

☒ Government, or foreclosed, nor has mortgage relief by the mortgagee been given

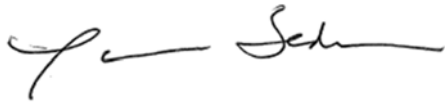
☒ I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list

☒ To the best of my knowledge there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past 10 years

☒ I have not been suspended, been barred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs

☒ I have not failed to use state funds or LIHTC allocated to me in any state

I have checked each deletion, if any, and have attached a true and accurate signed statement, if applicable; to explain the facts and circumstances that I think help to qualify me as a responsible principal for participation in this NOFA.



05/24/2023

Signature

Date

Maureen Sedonaen

CEO

Printed name

Title

This application and all supporting material are regarded as public records under the California Public Records Act.



### **Applicant supporting material**

In addition to submitting a complete application, the following additional supporting material must be provided with the application:

1. Cover letter: Provide a brief summary of the proposed project and discuss your agency's qualifications and why your proposal should be selected for funding.
2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.
3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.
4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.
5. Experience (owner/developer and property manager): Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.
6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.
7. Financial proforma: Please provide detailed financial information for the proposed project including permanent and construction fund sources, detailed permanent development budget, unit affordability mix/rent schedule, operating budget and 30-year cash flow. If the project will use tax credits, please provide the tax credit calculations.
8. Photos: Attach recent clearly labeled photos of the project site and surrounding area.
9. Board of directors: Provide a listing of the board of directors including the city of residence.



# NOTICE OF FUNDING AVAILABILITY (NOFA)

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702



The City of Menlo Park announces the availability of funds for affordable housing projects in Menlo Park and seeks responsive proposals. Approximately \$1.5-2 million in Below Market Rate (BMR) housing funds are available under this NOFA to support the preservation or production of permanent affordable housing. The funding is intended to fill the financing gap between the projected total development costs and other available funding sources.

Qualified developers of affordable housing who meet the NOFA qualifications are encouraged to submit proposals. All proposals must be received no later than 2 p.m., Jan. 27, 2023. Interested parties may submit as an individual entity and/or may collaborate with other entities, so long as the collective group meets the NOFA requirements. Funding will be awarded by the City Council on a competitive basis to those projects that are most successful in addressing the City's affordable housing needs.

The City is seeking proposals demonstrating the following: an understanding of the community; the unique attributes and opportunities of the neighborhood where the project will be located; successful experience in developing and managing affordable housing; and a commitment to an inclusive and informative public engagement process. Applicants must have successfully completed prior affordable housing projects. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement.

Eligible projects include the preservation of existing affordable housing and the acquisition or new construction of permanent affordable rental or ownership housing for extremely low, very low and low-income households. Proposals from organizations that produce affordable housing through the administration of housing programs will also be considered, although BMR housing funds will be primarily limited to direct housing production (e.g., first-time homebuyer program, accessory dwelling unit loan program, acquisition of existing housing, etc.). The development of emergency shelters for the homeless and transitional housing is not eligible because they do not result in permanent affordable housing. Mixed-income projects containing both affordable and market-rate rental and ownership units are eligible, with only the affordable housing portion of the project eligible for assistance under this NOFA.

The City will evaluate proposals based on City Council-adopted project goals and housing priorities. All proposals will be reviewed for consistency with the Housing Element and the City's General Plan. There will not be a point system applied to these goals and priorities.

Funding priority will be given to applications received by the due date in this NOFA. If there are BMR funds available after the NOFA process, these funds will be available on an over-the-counter basis, subject to Housing Commission review and City Council approval.

|                                     |                               |
|-------------------------------------|-------------------------------|
| NOFA questions due:                 | 2 p.m., Friday, Jan. 20, 2023 |
| NOFA applications due:              | 2 p.m., Friday, Jan. 27, 2023 |
| Housing Commission presentations:   | TBD, spring 2023              |
| Housing Commission recommendations: | TBD, spring 2023              |
| City Council approvals:             | TBD, spring 2023              |

To be considered for funding under this NOFA, the project should attempt to meet the following project priorities:

- Housing units will remain affordable through deed restrictions for at least 55 years.
- The project is consistent with the goals and objectives of the City's Housing Element and General Plan
- The project has reasonable costs, the ability to compete well in securing competitive fund sources, and is soundly underwritten.
- The project will allow the City to spend housing funds expeditiously, projects should be "ready to go."
- The project site allows a development to achieve maximum density and is consistent with the applicable zoning
- The project provides dual benefits by preserving/developing affordable housing and creating a substantial improvement of a blighted property and/or neighborhood.
- The building incorporates green building practices and materials.





**HIP HOUSING  
CITY OF MENLO PARK  
AFFORDABLE HOUSING OPPORTUNITY**

**CONTACT:**

KATE COMFORT HARR  
HIP HOUSING, EXECUTIVE DIRECTOR  
[Kcomfort@hiphousing.org](mailto:Kcomfort@hiphousing.org)  
(650) 348-6660 x 307

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HIP Housing is seeking assistance in the construction of a 9-unit apartment complex located at 1162 El Camino Real in the City of Menlo Park. The development currently consists of two studio, three 1-bedroom and four 2-bedroom apartments that would be deed restricted as affordable in perpetuity at the 30% and 60% AMI levels.

To achieve the 9-unit development of all affordable housing, the City of Menlo Park has expressed an interest in allowing market rate developers to meet their affordable housing obligation using a donations of land or cash into the development of the units as a way to meet their affordable housing requirements for other developments they are developing.

The creation of affordable housing is complicated and expensive and most Cities are looking for creative ways to meet their RHNA obligations to provide such housing. Simultaneously, market rate developers are eager to find ways to meet their City obligations to provide affordable housing as part of their entitlements for new developments.

Herein lies the opportunity.

**HIP Housing**

HIP Housing is a local nonprofit that has been providing creative affordable housing solutions throughout San Mateo County since 1972. The organization works exclusively in San Mateo County and provides or maintains affordable housing for 1200-1400 low-income individuals each year. What began as a humble social service housing program provider has grown into an organization that provides multiple social service housing programs as well as brick and mortar housing opportunities.

Of the 20 properties HIP Housing owns, 3 are located in the City of Menlo Park, a municipality that also provides annual financial support to the organizations Home Sharing social service program.

The trust and history between the City of Menlo Park and HIP Housing is long and well established. This is why when the unique opportunity to develop a 9-unit property on El Camino in Menlo Park emerged, the City contacted HIP Housing. An additional consideration for the City is that HIP



Housing has a proven record of working with market rate developers in meeting their affordable housing obligations including Greystar and Premia Capital.

### **The Opportunity:**

Currently, the land located at 1162 El Camino is owned by Prince Street Partners. It is ideally located on the transit corridor, 1-mile from the Menlo Park Caltrain Station and .2 of a mile from the intersection of El Camino Real and Santa Cruz Avenue which represents the entrance to downtown Menlo Park with access to many amenities, services and job opportunities for lower wage workers.

Prince Street is also in possession of City entitled plans for the construction of the 9-unit. If left to their construction, its construction, Prince Street would build the complex with 3 affordable units and 6 market rate.

As an alternate scenario, Prince Street Partners is offering to donate the land and the development plans so the units could be constructed by HIP Housing with all 9-units deed restricted as affordable. This donation would be done in order to satisfy the Prince Street obligation to provide 3-units affordable housing from previous developments in the City. The value of the land with construction plans far exceeds their cost to develop 3-units. With the donation of land and entitled plans, the remaining burden to development for HIP Housing remains the cost of construction.

To this end we are looking to partner with a second developer to utilize their affordable housing impact fee. Tarlton has a current obligation to pay approximately \$5.2 Million in affordable housing impact fees for a project already entitled. They have expressed interest in partnering on this project by donating their fee towards the construction of the 9-affordable units.

With these pieces in place, HIP Housing is estimating the need to fill a financing gap of approximately \$5.8 Million.

The opportunity to purchase and restrict all 9-units as affordable fits ideally into HIP Housing's property portfolio. Our buildings are typically 6-16 units and always done in partnership with local municipalities. Smaller sites like these are not eligible for state financing programs and even County funding create requirements that make small site development challenging.

For this reason, HIP Housing is looking to the City's existing BMR fund to assist in closing the \$5.8M financing gap. The closer the City can come to closing the gap, the deeper the affordability opportunity for the tenants who will reside at 1162. By requesting the entire amount of the financing gap, HIP Housing would be able to restrict all the units in a combination of 30% and 60% AMI levels.



We have put the construction drawings out to bid but will not receive them back until after the end of this NOFA period. Once we receive the bid, we will have a more complete estimate of the financing gap. Nonetheless, we want to introduce this project to the committee as it represents a tremendous opportunity to partner across sectors.

The affordable housing crisis we face locally is far too great for any one sector to fix alone. In partnership, using every creative tool we can, the opportunity to solve the problem increases exponentially.

This project offers the possibility of creating units for the City of Menlo Park that meet the RHNA obligation for the lowest affordability levels while also being an efficient way for developers of a new project to meet their affordable housing obligation with HIP Housing benefiting by adding a new, ideally located property to its portfolio.

To our knowledge, never in the history of San Mateo County's have two private sector companies, an experienced nonprofit and a public municipality come together to do a project quite like this. The opportunity to create a new model of partnership is a wonderful example of creative problem solving where everyone wins.



- The project incorporates appropriate community spaces, amenities, and services for the target population.
- The project site is within walking distance of transit, services, and amenities and is convenient for the target population.
- The project will implement a Local Hire program for Menlo Park residents (via construction and/or operations) when applicable
- The development team has demonstrated experience with successful affordable housing projects and the capacity to work cooperatively with communities in the design and development of projects.
- The project provides housing targeting very low and low-income households.
- The project is in central or west Menlo Park.
- The project contains larger units (2+ bedroom units and larger) and generally targets families.
- The project's management plan promotes a healthy living environment for tenants.

#### Application review

Staff will review all proposals to verify applicant eligibility. Proposals from developers that do not meet the City's minimum required experience will not be considered. Incomplete proposals will not be considered.

Please note that the City aims to target BMR funds toward projects serving households at the lowest affordability levels. The City also intends to maximize the impact of its investment by awarding funds to projects requesting reasonable levels of subsidy, leveraged by other fund sources. So, in instances where there are multiple projects applying for funds, affordability targeting and subsidy level per unit will be considered.

#### Environmental review and assessment

Before the final funding commitment, projects must be assessed in accordance with the California Environmental Quality Act (CEQA). If Federal funding is involved, the project must also be assessed in accordance with the National Environmental Policy Act (NEPA).

The City of Menlo Park reserves the right to request additional information from applicants, reject any and all submittals, waive any irregularities in the submittal requirements or cancel, suspend or amend the provisions of this NOFA. If such an action occurs, the City will notify all interested parties in advance.

Should discrepancies or omissions be found in this RFP or should there be a need to clarify this RFP, questions or comments regarding this RFP must be put in writing and received by the City no later than 2 p.m. Friday, Jan. 20, 2023. Written questions may be submitted electronically through the city bid portal at [menlopark.gov/planetbids](http://menlopark.gov/planetbids) or via email to Interim Housing Manager Eren Romero at [eromero@menlopark.gov](mailto:eromero@menlopark.gov)

Responses from the City will be communicated in writing to all recipients of this RFP. All addenda shall become part of this RFP. The City shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by the City.

The NOFA application is completed entirely online and will close at 2 p.m., Jan. 27, 2023. Follow the steps below to create your vendor record, access all relevant NOFA information, and create and submit your online application and any attachments.

Step 1. Create a new vendor record, or access your existing record on PlanetBids, to initiate your NOFA application.

- Applicants who do not have a username password for the PlanetBids website may register for free by selecting "New Vendor Registration" at [menlopark.gov/planetbids](http://menlopark.gov/planetbids).

Step 2. Access the following NOFA information in PlanetBids.

The NOFA solicitation packet with instructions for accessing, completing and submitting the online NOFA application.

- General NOFA information, including updates and NOFA closing timelines; and
- All addenda (question-and-answer responses), including responses to requests for clarification or interpretation during the application period, which are regularly updated until the NOFA closes. Applicants should regularly visit the Vendor Portal to view updates.

Applications must be submitted by 2 p.m., Friday, Jan. 27, 2023, using the online vendor portal.

Please note - under the California Public Records Act, all documents submitted as part of this application are considered public records and will be made available to the public upon request.



## 2022-23 NOTICE OF FUNDING AVAILABILITY APPLICATION

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702

|   |  |                                    |                      |
|---|--|------------------------------------|----------------------|
| Organization/Agency: HIP Housing, Inc.  |  |                                    |                      |
| Primary contact person: Kate Comfort Harr, Executive Director   |  |                                    |                      |
| Phone: 650-348-6660 ext. 307  |  | Email: kcomfort@hiphousing.org     |                      |
| Address: 800 S. Claremont Street, Suite 210   |  | City: San Mateo                    | State: CA Zip: 94402 |
| <p>1. What is the role of the applicant in the project (check all that apply):</p> <p><input type="checkbox"/> Ownership entity</p> <p><input type="checkbox"/> Managing partner or managing member</p> <p><input checked="" type="checkbox"/> Sponsoring organization</p> <p><input checked="" type="checkbox"/> Developer</p> <p><input type="checkbox"/> Other (describe):</p>                             |  |                                    |                      |
| <p>2. Applicant legal status:</p> <p><input type="checkbox"/> General partnership</p> <p><input type="checkbox"/> Joint venture</p> <p><input type="checkbox"/> Limited partnership corporation</p> <p><input checked="" type="checkbox"/> Nonprofit organization</p> <p><input type="checkbox"/> Other (please specify):</p>   |  |                                    |                      |
| <p>3. Organization status:</p> <p><input checked="" type="checkbox"/> Currently exists</p> <p><input type="checkbox"/> To be formed (estimated date):</p>   |  |                                    |                      |
| <p>4. Name(s) of individuals who are/will be general partner(s) or principal owner(s):</p> <p>If the applicant is a joint venture, a joint venture agreement is required that clearly describes the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.</p>  |  |                                    |                      |
| Project name: 1162 El Camino Real   |  |                                    |                      |
| Project address: 1162 El Camino Real  |  | City: San Mateo                    | State: CA Zip: 94402 |
| Assessor's parcel number:   |  |                                    |                      |
| <p>Project type (check all that apply):</p> <p><input checked="" type="checkbox"/> Families</p> <p><input type="checkbox"/> Seniors</p> <p><input type="checkbox"/> Special needs</p> <p><input type="checkbox"/> Other (please describe):</p>  |  |                                    |                      |
| <p>Project activity (check all that apply):</p> <p><input checked="" type="checkbox"/> Acquisition</p> <p><input type="checkbox"/> Rehabilitation</p> <p><input checked="" type="checkbox"/> New construction</p> <p><input type="checkbox"/> Preservation</p> <p><input type="checkbox"/> Mixed-income</p> <p><input type="checkbox"/> Mixed-use</p> <p><input type="checkbox"/> Other (please specify):</p> |  |                                    |                      |
| Land area: 8,374  |  | Number of residential buildings: 1 |                      |



| Number of units: 9  | Residential total floor area: 16,204 |      |      |      |      |                     |      |      |      |      |
|---|--------------------------------------|------|------|------|------|---------------------|------|------|------|------|
| Number of stories: 3  | Number of elevators: 1               |      |      |      |      |                     |      |      |      |      |
| Number of community rooms: 0  | Community room(s) total floor area:  |      |      |      |      |                     |      |      |      |      |
| Commercial/office uses (please specify):<br>None  |                                      |      |      |      |      |                     |      |      |      |      |
| Commercial total floor area: None   | Office total floor area: None        |      |      |      |      |                     |      |      |      |      |
| Other uses (please specify):  |                                      |      |      |      |      |                     |      |      |      |      |
| Total parking spaces: 9   | Parking type(s): auto                |      |      |      |      |                     |      |      |      |      |
| Residential parking spaces: 9   | Residential parking ratio: 1:1       |      |      |      |      |                     |      |      |      |      |
| Guest parking spaces: 0   |                                      |      |      |      |      |                     |      |      |      |      |
| Commercial parking spaces: n/a  | Commercial parking ratio: n/a        |      |      |      |      |                     |      |      |      |      |
| Office parking spaces: n/a  | Office parking ratio: n/a            |      |      |      |      |                     |      |      |      |      |
| <p>City BMR funds may only fund units serving extremely low, very low or low income households at or below 80% of the area median income (AMI). Inclusions of units for homeless households are encouraged.</p> |                                      |      |      |      |      |                     |      |      |      |      |
| Category  | Number of units                      |      |      |      |      | Percentage of units |      |      |      |      |
|   | Studio                               | 1 bd | 2 bd | 3 bd | 4 bd | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| 0 to 30% AMI – Extremely low  |                                      |      |      |      |      |                     |      |      |      |      |
| 31 to 50% AMI – Very low  |                                      |      |      |      |      |                     |      |      |      |      |
| 51 to 80% AMI – Low   | 2                                    | 3    | 4    |      |      |                     |      |      |      |      |
| 81 to 120% AMI – Moderate   |                                      |      |      |      |      |                     |      |      |      |      |
| Unrestricted  |                                      |      |      |      |      |                     |      |      |      |      |
| TOTAL   | 2                                    | 3    | 4    |      |      |                     |      |      |      |      |
| <p>What is your existing total BMR obligation by unit type?</p>   |                                      |      |      |      |      |                     |      |      |      |      |
| Category  | Number of units                      |      |      |      |      | Percentage of units |      |      |      |      |
|   | Studio                               | 1 bd | 2 bd | 3 bd | 4 bd | Studio              | 1 bd | 2 bd | 3 bd | 4 bd |
| BMR Obligation  |                                      |      |      |      |      |                     |      |      |      |      |



Provide a brief list of unit amenities (e.g., air conditioning, laundry in unit, balconies, etc.):

1. **Project description:** Provide a brief narrative summary of the proposed project including location, project type (e.g., new versus rehab), target population and any unique project characteristics

Development of 9 below market rate units. See separate attached narrative.

2. **Project design:** Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.

Development of 9 below market rate units. Site plan attached.

3. **Green building features:** Describe the green building features that will be incorporated into the project.

Project is currently entitled for Prince Street Partners and would be taken over as is from them.

4. **On-site amenities:** Describe any on-site amenities including any project characteristics that address the special needs of the population you intend to serve.

Project is currently entitled for Prince Street Partners and would be taken over as is from them.

5. **Neighborhood off-site amenities:** Describe the property location, neighborhood transportation options, and local services and amenities that are within 1/4 mile and 1/2 mile of the site.

See Site Plan Attached



6. Potential development obstacles: Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below including an outline of steps that will be taken and the time needed to resolve these issues.

Since the project is currently entitled, the biggest obstacles are financing and potentially, the increases in construction costs and interest rates.

Site control is required. Evidence should also be submitted demonstrating that the entity that has site control is the same entity applying for funds. Please include the site control document with the application.

What type of site control does the applicant currently hold? Site control currently being negotiated between current Owner (Prince Street Partners) and the City of Menlo Park

Will site acquisition be a purchase or long-term lease? Purchased

What is the purchase price of the land? For proposed leaseholds, indicate the amount of the annual lease payment and the basis for determining that amount:

Land would be donated to the project at an estimated value of \$3,400,000

What is the current County-assessed value of the site?

The site has been demoed in preparation of new construction and would need a new assessment.

Who is the current property owner and what is their address and contact information? Prince Street Partners  
Chase Rapp, Prince Street Partners, (650) 815-6969, cahse@princestreetpartners.com

Total square footage of site: 8,374

Existing uses on the site and the approximate square footage of all structures:

Small retail and office

Planned use of on-site existing structures.

- ☒ Demolish  
☐ Rehabilitate  
☐ Other (describe).

Provide the square footage, date built and number of stories for each on-site building to be retained as part of this project: Nothing to be retained

Provide a brief description of the condition of any buildings to be rehabilitated:

N/A



Describe unique site features (heritage trees, parcel shape, etc.)

None

Identify problem site conditions (high noise levels, ingress/egress issues, etc.)

None

Is the site in a floodplain? ☐ Yes ☒ No

If yes, type of flood plain and number of years:

List any maps referenced:

Describe adjoining properties:

West:

East:

North:

South:

What is the current zoning of the project site?

Is the proposed project consistent with the existing zoning of the site? ☒ Yes ☐ No

Explain:

Indicate any discretionary review permits required for the project (e.g., planned community permits, design review permits, rezoning, etc.)



If rezoning is required identify the requested zoning district for the project: N/A currently entitled

Explain how this project meets the objectives of the project priorities identified in this NOFA and the goals and objectives of the City's Housing Element and General Plan:

This project would add 9 new very low and extremely low income units to the the Menlo Park footprint that are on transit and centrally located to services.

City funds requested: \$5,000,000 Funds per assisted unit: \$ 555,556

Total project cost: \$14,500,000 Cost per assisted unit: \$ 1,611,111

How will the requested City funding be used? Acquisition, development and construction

Assess the chances of the project securing required funding and steps that will be taken to make the project competitive.

See Attached Narrative. Since this a small project, it is not eligible for competitive state or federal financing. The proposal for this development is for a land donation from the current owner, coupled with \$5M in impact fees from a developer ready to make a contribution with the remaining financing coming from Menlo Park BMR funds.5

OPTIONAL: What is the self-scored 9% tax credit tiebreaker score for the project? (Please note that you may be required to provide this during the application review) N/A - not pursuing tax credits

Applicants may be nonprofit or for-profit affordable housing developers or owners who have affordable housing experience in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda and Santa Clara) and a successful track record of at least two years of ownership of at least two affordable, deed-restricted housing projects within the nine-county Bay Area in which 100% of the units are targeted to those at or below 80% AMI. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement. Previous development/ownership experience must include projects that contain at least 10 units.

Years of experience: 34

Number of projects: 20

Number of projects in San Mateo County: 20

Average size of projects: 16

Number of units placed in service: 164 from construction and 329 total units owned.



|   |   |
|---|---|
| Please describe two projects completed in the last 10 years that are similar to the proposed project and provide photographs of each project: |   |
| <b>Project 1 – Project name:</b>  | Edgewater Isle  |
| <b>Location:</b>  |   |
| <b>Number of units:</b>   | 92  |
| <b>Type of development (senior, family, etc.):</b>  | Senior  |
| <b>Name of project manager:</b>   | Michael Rogers  |
| <b>Number of stories:</b>   | 2   |
| <b>Unit types (studio, 1 bedroom, etc.):</b>  | 1 bedrooms  |
| <b>Type of construction:</b>  | Wood  |
| <b>Project amenities:</b>   |   |
| <b>Entitlement date:</b>  | 4/9/2015  |
| <b>Occupancy date:</b>  |   |
| <b>Funding sources:</b>   | TCAC, CalFHA, San Mateo County City of San Mateo, ,               |
| <b>Project 2 – Project name:</b>  | Redwood Oaks  |
| <b>Location:</b>  |   |
| <b>Number of units:</b>   | 36  |
| <b>Type of development (senior, family, etc.):</b>  | Special needs   |
| <b>Name of project manager:</b>   | Michael Rogers  |
| <b>Number of stories:</b>   | 2   |
| <b>Unit types (studio, 1 bedroom, etc.):</b>  | 1-bedrooms  |
| <b>Type of construction:</b>  | Wood  |
| <b>Project amenities:</b>   |   |
| <b>Entitlement date:</b>  |   |
| <b>Occupancy date:</b>  | 5/5/2020  |
| <b>Funding sources:</b>   | TCAC, CalFHA, HCD (MHP), County of San Mateo City of Redwood City |



| List the names of key members of the applicant's development team, their titles, responsibilities and years of experience in affordable housing. |                   |                          |   |                           |
|--|-------------------|--------------------------|---|---------------------------|
| Project Staff  | Name              | Role in proposed project | Years of housing development experience | Years with this developer |
| Project manager  | Michael Rogers    |                          | 30                                      | 9                         |
| Director of real estate development  | Kate Comfort Harr |                          |   |                           |
| Executive director   | Kate Comfort Harr |                          | 11                                      | 11                        |
| Chief financial officer  | Ghion Dessie      | Financial Oversight      | 3                                       | 3                         |
| Other  |                   |                          |   |                           |
| Other  |                   |                          |   |                           |

Indicate which of the following development team members have been selected and identify them if different from applicant.

|  |                         |
|--|-------------------------|
| Developer: HIP Housing/HIP Housing Development Corp.   | Architect(s): TBD       |
| Engineer(s): TBD                                       | General contractor: TBD |
| Attorney(s) and/or tax professionals Goldfarb & Lipman |                         |
| Property management agent In-house                     |                         |
| Financial and other consultant(s)                      |                         |
| Investor(s):   |                         |

List all other participants and affiliates (people, businesses and organizations) proposing to participate in the project

| Name | Address |
|------|---------|
|      |         |
|      |         |
|      |         |
|      |         |

Describe how the property will be managed including the number of staff, locations and management office hours

TBD

If the project will be managed by an agency other than the project applicant describe the project applicant's role in the ongoing management of the project and resolution of management issues.

N/A



**Applicant certification**

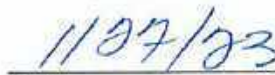
I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and or information herein are found to be misrepresented it shall constitute grounds for disqualification of my proposal. I further certify that the following statements are true except if I have indicated otherwise on this certification:

- ☒ I have not sold any of the projects listed on the 10 Year Projects list
- ☒ No mortgage on a project listed by me has ever been in default
- ☒ Government, or foreclosed, nor has mortgage relief by the mortgagee been given
- ☒ I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list
- ☒ To the best of my knowledge there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past 10 years
- ☒ I have not been suspended, been barred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs
- ☒ I have not failed to use state funds or LIHTC allocated to me in any state

I have checked each deletion, if any, and have attached a true and accurate signed statement, if applicable; to explain the facts and circumstances that I think help to qualify me as a responsible principal for participation in this NOFA.



Signature



Date



Printed name



Title

This application and all supporting material are regarded as public records under the California Public Records Act.



In addition to submitting a complete application, the following additional supporting material must be provided with the application:

1. Cover letter: Provide a brief summary of the proposed project and discuss your agency's qualifications and why your proposal should be selected for funding.
2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.
3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.
4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.
5. Experience (owner/developer and property manager): Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.
6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.
7. Financial proforma: Please provide detailed financial information for the proposed project including permanent and construction fund sources, detailed permanent development budget, unit affordability mix/rent schedule, operating budget and 30-year cash flow. If the project will use tax credits, please provide the tax credit calculations.
8. Photos: Attach recent clearly labeled photos of the project site and surrounding area.
9. Board of directors: Provide a listing of the board of directors including the city of residence.



# 1 1 6 2 EL CAMINO REAL

## MENLO PARK CA 94025



**NOTE: R.O.W. WORK  
UNDER SEPARATE  
PERMIT. SHOWN IN  
THIS SET FOR  
REFERENCE ONLY**

**PERMIT  
SUBMITTAL  
v1  
10.20.2021**

### DEFERRED SUBMITTALS

#### CITY OF MENLO PARK - SITE BUILT COMPONENTS

- FIRE PROTECTION
- PHOTOVOLTAICS

#### STATE OF CALIFORNIA

- FIRE PROTECTION

| OWNER  | ARCHITECT   | STRUCTURAL   | TITLE 24 / MECH / PLUMB  | ELECTRICAL   |
|--|---|--|--|--|
| PRINCE STREET PARTNERS<br>265 LYTTON AVE STE 303<br>PALO ALTO, CA 94301<br><br>CONTACT:<br>T: 650.815.6969 (CHASEN RAPP)<br>E: chase@princestreetpartners.com<br>E: brady@princestreetpartners.com | TOBY LONG DESIGN<br>6114 LA SALLE AVE #502<br>OAKLAND, CA 94611<br><br>T: 415.905.9030 X1<br>C: 510.333.3447<br>CONTACT: TOBY LONG, AIA<br>E: toby@chxtd.com            | STRUCTURAL ENGINEERING<br>27369 VIA INDUSTRIA<br>TEMECULA, CA 92560<br><br>T: 951.600.0032<br>CONTACT: SHANE LOTHROP<br>E: shane@seengineering.com | ALTER CONSULTING ENGINEERS<br>1624 FRANKLIN ST. SUITE 1300<br>OAKLAND, CA 94608<br><br>T: 510.474.0379<br>CONTACT: MATT DEHSHANI<br>E: matt@alterengineers.com | RJA<br>1620 MONTGOMERY ST #250<br>SAN FRANCISCO, CA 94111<br><br>T: 415.726.759<br>CONTACT: RAY JUACHON<br>E: rja@rja-inc.com                      |
| SURVEYOR   | GEOTECH   | ARBORIST   | CIVIL  | LANDSCAPE  |
| TRIADHOLMES ASSOCIATES<br>777 WOODSIDE RD. 2DA<br>REDWOOD CITY, CA 94061<br><br>T: 650.366.0216<br>CONTACT: ANDREW HOLMES<br>E: aholmes@thainc.com   | ROMIG ENGINEERS, INC<br>1390 EL CAMINO REAL 2ND FLR<br>SAN CARLOS, CA 94070<br><br>T: 650.591.5224<br>CONTACT: GLEN ROMIG<br>E: glenn@romigengineers.com                | URBAN TREE MANAGEMENT<br>PO BOX 971<br>LOS GATOS, CA 95031<br><br>T: 650.321.0222<br>CONTACT: MICHAEL YOUNG<br>E: myoung@urbantree.com             | TRIADHOLMES ASSOCIATES<br>873 NORTH MAIN ST. #150<br>BISHOP, CA 93514<br><br>T: 760.594.7588<br>CONTACT: MATT PETRONI<br>E: mpetroni@thainc.com                | THE GUZZARDO PARTNERSHIP<br>181 GREENWICH ST.<br>SAN FRANCISCO, CA 94111<br><br>T: 415.433.4672 EX 21<br>CONTACT: MARCO LEI<br>E: MLei@tgp-inc.com |
| TRANSPORTATION   | ACOUSTICS   | LEED   | GEN CONTRACTOR   | MODULAR FABRICATOR   |
| HEXAGON TRANSPORTATION<br>CONSULTANTS, INC.<br>4 NORTH 2ND STREET, STE 400<br>SAN JOSE, CALIFORNIA 95113<br><br>T: 408.971.6100<br>CONTACT: GARY BLACK<br>E: gblack@hextrans.com                   | SAVELBY ACOUSTICS, LLC<br>915 HIGHLAND POINTE<br>DRIVE SUITE 200<br>ROSEVILLE, CA 95678<br><br>T: 916.760.8891<br>CONTACT: LINDA SABELBY<br>E: lsabel@saveacoustics.com | BRIGHTWORKS<br>23188 SHATTUCK AVENUE<br>BERKELEY, CA 94704<br><br>T: 310.452.5634<br>CONTACT: CASSIDY GREEN<br>E: cassy@green@brightworks.net      | DISTINCT BUILDERS<br>MOUNTAIN VIEW, CA 94041<br><br>T: 650.224.5127<br>CONTACT: BONNIE GILSON<br>E: bonnie@distinctbuilders.com                                | SILVER CREEK<br>2830 BARRETT AVENUE<br>PERRIS, CA 92571<br><br>T: 951.943.5393<br>CONTACT: KEVIN ALLEN<br>E: kallen@silvercreek.net                |

**NOTE: THIS PROJECT INCLUDES  
PREFABRICATED MODULAR CONSTRUCTION**

### SCOPE OF PLAN CHECK

#### CITY OF MENLO PARK - SITE BUILT COMPONENTS

- GRADING AND DRAINAGE
- UTILITIES
- FOUNDATION/GROUND FLOOR TO TOP OF PODIUM, TYPE I CONSTRUCTION
- MECHANICAL, ELECTRICAL, PLUMBING, FIRE CONNECTIONS BETWEEN MODULES
- MECHANICAL, ELECTRICAL, PLUMBING, FIRE FOR SITE BUILT SPACES
- ROOF DECKS, GREEN ROOF
- EXTERIOR MATERIALS INCLUDING SIDING, ROOFING, ROOF DRAINAGE, WATERPROOFING
- ELEVATOR
- STAIR
- LANDSCAPE

#### STATE OF CALIFORNIA - FACTORY-BUILT MODULAR COMPONENTS

- RESIDENTIAL UNIT MODULES, LEVELS 2-3



# 1 1 6 2 EL CAMINO REAL

## MENLO PARK CA 94025



4 VICINITY MAP



5 ASSESSOR'S PARCEL MAP

### BUILDING CODE INFORMATION

|                    |   |  |
|--------------------|---|--|
| OCCUPANCY TYPE:    | R-2, S-2  | 2020 MENLO PARK REACH CODES  |
| CONSTRUCTION TYPE: | GROUND FLOOR<br>PODIUM - TYPE 1A, S-2<br>LEVELS 2-3 - TYPE VA | 2019 CALIFORNIA BUILDING CODE<br>2019 CALIFORNIA ENERGY CODE<br>2019 CALIFORNIA GREEN CODE                                       |
| EXTERIOR WALLS:    | PODIUM - 34HR<br>LEVELS 2-3 - 1HR                             | 2019 CALIFORNIA FIRE CODE<br>2019 CALIFORNIA MECHANICAL CODE<br>2019 CALIFORNIA PLUMBING CODE<br>2019 CALIFORNIA ELECTRICAL CODE |
| SPRINKLERED:       | YES   | PROJECT IS DESIGNED IN COMPLIANCE WITH<br>CURRENT FEDERAL REGULATIONS<br>CONTAINED IN ADA AND FAIR HOUSING ACT.                  |
| ELEVATOR:          | YES   |  |

### 6 BUILDING CODE INFORMATION & REFERENCES

|                                 |  |   |
|---------------------------------|--|---|
| WINDOW<br>SCHEDULE<br>REFERENCE | REVISION<br>REFERENCE                    | Plan No.<br>1<br>Sheet No.                                |
| DOOR<br>SCHEDULE<br>REFERENCE   | ALIGN<br>ALIGN FINISH<br>SURFACES        |   |
| WALL<br>ASSEMBLY<br>REFERENCE   | ELEVATION<br>REFERENCE                   | Elev. No. ELEVATION/<br>SECTION<br>REFERENCE<br>Sheet No. |
|                                 | FLOOR / CEILING<br>ASSEMBLY<br>REFERENCE | Detail No. DETAIL<br>REFERENCE<br>Sheet No.               |

7 SYMBOLS

### PROJECT DATA

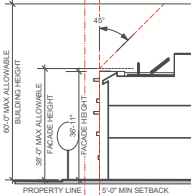
MENLO PARK SPECIFIC PLAN AREA ZONING:  
EL CAMINO REAL  
DOWNTOWN STATION AREA EAST

APN:  
061 441 100

DENSITY:  
90 DU/ACRE (60 WITH PUBLIC BENEFIT BONUS)

BELOW MARKET RATE HOUSING:  
3 BMR UNITS (CONFORM CARRY OVER FROM  
PREVIOUS PROJECT APPROVALS)

BMR TO BE EQUAL MIX



| DEVELOPMENT STANDARDS   | PROPOSED PROJECT   | EXISTING DEVELOPMENT                     | ZONING ORDINANCE       |
|---|--|--|------------------------|
| Lot area  | 8,374 sq ft  | 8,374 sq ft                              | N/A for ECR of min.    |
| Lot width   | 75 ft  | 75 ft                                    | N/A for ECR of min.    |
| Lot depth   | 111.65 ft  | 111.65 ft                                | N/A for ECR of min.    |
| Setbacks  |  |  |                        |
| Front   | 0'-0" MIN  | 0 ft                                     | 5 ft min.              |
| Rear  | 19'-3"   | 3'-2" MIN, 55'-10" MAX                   | 5 ft min.              |
| Side (left)   | 0 ft   | 1'-0" MIN, 1'-11" MAX                    | 0 ft min.              |
| Side (right)  | 3'-7" MIN, 6'-2" MAX   | 1'-4"                                    | 0 ft min.              |
| Building coverage   | 6,911 sq ft  | 4,398 sq ft                              | N/A for ECR of max.    |
| FAR (Floor Area Ratio)*   | 11,282 sq ft   | 6,229 sq ft                              | 75 % max.              |
| FAR (Floor Area Limit)*   | 1,347  | 6.82                                     | 11,995 sq ft max.      |
| FAR (Floor Area Limit)*   | N/A  | N/A                                      | 1.35 max.              |
| Square footage by floor   |  |  |                        |
| Below grade   | 0 sq ft  | 204 sq ft                                |                        |
| 1st   | 6,394 sq ft  | retail: 1,332 sq ft                      |                        |
| 2nd   | 6,394 sq ft  | office: 1,757 sq ft                      |                        |
| 3rd   | 4,894 sq ft  | 0 sq ft                                  |                        |
| accessory building(s)   | 0 sq ft  | 754 sq ft                                |                        |
| other   | 0 sq ft  | 1 laboratory building, 1,152 sq ft       |                        |
| Square footage of buildings   | 16,284 sq ft   | 6,229 sq ft                              | N/A per ECR of max.    |
| Building height   | Facade: 38'-11" Roof: 38'-9"   | 30'-10" ft                               | 38' facade 60' ft max. |
| Landscaping   | at grade, on property: 862 sq ft   | 1,279 sq ft                              | N/A for ECR of min.    |
| Planting  | 15.81 ft   | 3.77 ft                                  | 45 % min.              |
| Planting  | 13%  | 45 %                                     | N/A for ECR of min.    |
| Planting  | 9 spaces   | 2 spaces                                 | 9 spaces               |
| Define Basis for Parking  | (Example: 1 covered) uncovered per residential unit or 8 of spaces/1 square foot |  |                        |
| Trees   | 2 of existing<br>Heritage trees  | 0 of existing<br>Heritage trees          | 0 of new<br>trees      |
| Existing Heritage Trees removed<br>per Heritage Tree Removal<br>Permit:<br>PLAN2020-00011 & HTR2020-138 | 0 of existing<br>Heritage trees to<br>be removed                                 | 0 of non-Heritage<br>trees to be removed | Total # of<br>trees    |
|   | 0  | 1  | 10                     |

| BUILDING AREA SUMMARY      |                      |         |                      |                      |             |
|----------------------------|----------------------|---------|----------------------|----------------------|-------------|
| RESIDENTIAL AREA (9 UNITS) |                      |         | 8,051                |                      |             |
| PARKING (9 SPACES)         |                      |         | 4,188                |                      |             |
| LOBBY                      |                      |         | 758                  |                      |             |
| COMMON AREA                |                      |         | 3,207                |                      |             |
| TOTAL AREA                 |                      |         | 16,204               |                      |             |
| UNIT COUNT SUMMARY         |                      |         |                      |                      |             |
| LOCATION                   |                      | STUDIOS | 1 BED                | 2 BED                | TOTAL UNITS |
| LEVEL 2                    |                      | 2       | 1                    | 2                    | 5           |
| LEVEL 3                    |                      | 0       | 2                    | 2                    | 4           |
| TYPE TOTAL                 |                      | 2       | 3                    | 4                    | 9           |
| AREA DETAILS               |                      |         |                      |                      |             |
| LEVEL 1                    |                      |         |                      |                      |             |
| TYPE                       |                      | AREA    |                      |                      |             |
| PARKING                    |                      | 4,188   |                      |                      |             |
| LOBBY                      |                      | 758     |                      |                      |             |
| COMMON AREAS               |                      | 1,358   |                      |                      |             |
| TOTAL LEVEL 1              |                      | 6,304   |                      |                      |             |
| LEVEL 2                    |                      |         |                      |                      |             |
| UNIT                       | TYPE                 | AREA    | UNIT                 | TYPE                 | AREA        |
| 201                        | 2 BED / 2 BATH       | 1,255   | 301                  | 2 BED / 2 BATH       | 1,255       |
| 202                        | 2 BED / 2 BATH (BMR) | 1,255   | 302                  | 2 BED / 2 BATH       | 1,264       |
| 203                        | STUDIO / 1 BATH      | 417     | 303                  | 1 BED / 1 BATH       | 725         |
| 204                        | 1 BED / 1 BATH (BMR) | 737     | 304                  | 1 BED / 1 BATH (BMR) | 737         |
| 205                        | STUDIO / 1 BATH      | 405     |                      |                      |             |
| RESIDENTIAL SUBTOTAL       |                      | 4,070   | RESIDENTIAL SUBTOTAL |                      | 3,981       |
| COMMON AREAS               |                      | 936     | COMMON AREAS         |                      | 913         |
| TOTAL LEVEL 2              |                      | 5,006   | TOTAL LEVEL 3        |                      | 4,894       |

3 PROJECT SUMMARY

THIS PROJECT CONSISTS OF A 9 UNIT APARTMENT BUILDING WITH GROUND FLOOR LOBBY AND ENCLOSED PARKING GARAGE, INCLUDING 1 BMR UNIT & 2 CARRYOVER BMR UNITS FROM 506/556 SANTA CRUZ AVE.

### 1 PROJECT DESCRIPTION

#### ARCHITECTURAL

- A-0 COVER SHEET
- A-0.0 PROJECT INFORMATION
- A-0.1 CONDITIONS OF APPROVAL
- A-0.2 GENERAL NOTES
- A-0.3 PROJECT RENDERINGS & MATERIALS
- A-0.4 (E) PHOTOS, PROPOSED STREETScape
- A-0.5 PROJECT AREA PLAN
- A-0.6 ISOMETRIC MASSING DRAWINGS
- A-0.7 MODULAR DIAGRAMS
- A-0.8 LINE OF SIGHT DIAGRAM
- A-0.9 MODULATION/TRANSPARENCY DIAGRAMS
- A-0.10 FLOOR AREA & OPEN SPACE CALC.
- A-0.11 BUILDING CODE DATA
- A-0.12 FACADE OPENING CALCULATIONS
- A-0.13 SIGNAGE
- A-0.14 ACCESSIBLE SITE/PARKING
- A-0.15 ADA DETAILS
- A-0.16 CAL GREEN SHEET 1
- A-0.17 CAL GREEN SHEET 2
- A-0.18 LEED SCORECARD

#### 1.d.1 TOPOGRAPHIC SURVEY

- A-1.0 EXISTING SITE PLAN
- A-1.0.1 EXISTING FLOOR PLANS
- A-1.0.2 EXISTING FACADE
- A-1.0.3 EXISTING PLANS & FACADE
- A-1.1 CONSTRUCTION PLAN
- A-1.2 PROPOSED SITE PLAN
- A-1.3 LEVEL 1 PLAN
- A-1.4 LEVEL 2 PLAN
- A-1.5 LEVEL 3 PLAN
- A-1.6 ROOF PLAN
- A-1.7 ENLARGED UNIT PLANS
- A-1.8 LEVEL 1 RCP
- A-1.9 LEVEL 2 RCP
- A-1.10 LEVEL 3 RCP

#### A-3.0 BUILDING SECTIONS

- A-3.1 BUILDING SECTIONS
- A-3.2 BUILDING ELEVATION - FRONT
- A-3.3 BUILDING ELEVATION - SIDE
- A-3.4 BUILDING ELEVATION - REAR
- A-3.5 BUILDING ELEVATION - REAR

- A-5.1 STAIR A
- A-5.2 STAIR B
- A-5.3 ELEVATOR
- A-5.4 ELEVATOR
- A-5.5 ELEVATOR

- A-6.1 WALL PARTITION DETAILS
- A-6.2 FLOOR AND WALL ASSEMBLY DETAILS
- A-6.3 WALL SECTIONS
- A-6.4 INTERIOR DETAILS
- A-6.5 RATED PENETRATION DETAILS

- A-7.0 DOOR SCHEDULE
- A-7.1 WINDOW SCHEDULE
- A-7.2 STOREFRONT SCHEDULE

#### WATERPROOFING

- WP-5.00 BELOW GRADE WP
- WP-5.50 DECK / BALCONY WP
- WP-5.51 DECK / BALCONY WP
- WP-6.00 AIR/WB R.O. SEQUENCE - WINDOWS
- WP-6.10 AIR/WB R.O. SEQUENCE - DOORS
- WP-7.00 CLADDING COMPOSITE
- WP-7.01 CLADDING STUCCO
- WP-7.50 WINDOW AND DOOR SECTIONS
- WP-8.00 SINGLE PLY ROOFING
- WP-8.10 WPOCCURED DECK
- WP-9.00 SHEET METAL FLASHING

#### TRANSPORTATION

- T1 VEHICLE MANEUVERING SHEET

#### CIVIL

- C1 TITLE SHEET
- C2 GRADING AND DRAINAGE PLAN
- C3 UTILITY PLAN
- C4 STORMWATER MITIGATION PLAN
- C5 CONSTRUCTION DETAILS
- C6 EROSION CONTROL PLAN

#### LANDSCAPE

- L-1.1 GENERAL NOTES AND LEGEND
- L-1.2 PLANTING NOTES AND LEGEND
- L-1.3 WELO DOCUMENTS
- L-1.4 LANDSCAPE LAYOUT PLAN
- L-1.5 TREE DISPOSITION PLAN
- L-1.6 PLANTING PLAN
- L-1.7 IRRIGATION PLAN
- L-1.8 IRRIGATION NOTES AND LEGEND
- L-1.9 IRRIGATION DETAILS
- L-1.10 CONSTRUCTION DETAILS

#### STRUCTURAL

- SCS STRUCTURAL COVER SHEET
- SM1 STRUCTURAL GENERAL NOTES
- SM2 STRUCTURAL GENERAL NOTES
- SM3 STRUCTURAL GENERAL NOTES
- S1.0 FOUNDATION PLAN
- S2.0 PODIUM DECK PLAN
- S2.1 PODIUM LEVEL REBAR PLAN
- S3.0 2ND LEVEL FLOOR FRAMING PLAN
- S4.0 2ND LEVEL CEILING/WALL FRAMING PLAN
- S5.0 3RD LEVEL FLOOR FRAMING PLAN
- S6.0 ROOF FRAMING PLAN
- SD1.0 FOUNDATION DETAILS
- SD1.1 FOUNDATION DETAILS
- SD1.2 POST-TENSION PODIUM SLAB DETAILS
- SD1.3 POST-TENSION PODIUM SLAB DETAILS
- SD2.0 GENERAL FRAMING DETAILS
- SD3.0 GENERAL FLOOR TO CEILING FRAMING DETAILS
- SD3.1 MOD FLOOR TO CONCRETE PODIUM DETAILS
- SD3.2 GENERAL MOD TO CONCRETE PODIUM ANCHORAGE DETAILS
- SD4.0 ROOF FRAMING DETAILS

#### MECHANICAL

- M0.1 COVER SHEET
- M0.2 SCHEDULE
- M2.1 FLOOR PLAN-LEVEL 1
- M2.2 FLOOR PLAN-LEVEL 2
- M2.3 FLOOR PLAN-LEVEL 3
- M2.4 ROOF PLAN
- M7.1 MECHANICAL CONTROLS
- M7.2 MECHANICAL CONTROLS
- M8.1 MECHANICAL DETAILS
- M8.1 TITLE 24
- M8.2 TITLE 24

#### ELECTRICAL

- E0.1 COVER SHEET
- E2.1 LEVEL 01 FLOOR PLAN - LIGHTING
- E2.2 LEVEL 02 FLOOR PLAN - LIGHTING
- E2.3 LEVEL 03 FLOOR PLAN - LIGHTING
- E3.1 LEVEL 01 FLOOR PLAN - POWER
- E3.2 LEVEL 02 FLOOR PLAN - POWER
- E3.3 LEVEL 03 FLOOR PLAN - POWER
- E4.1 ROOF PLAN - POWER
- E4.1 ENLARGED PLAN
- E4.2 ENLARGED TYP. UNIT PLANS - LIGHTING
- E4.3 ENLARGED TYP. UNIT PLANS - POWER
- E5.1 SINGLE LINE DIAGRAM
- E5.2 LOW VOLTAGE RISER DIAGRAM
- E6.1 CALCULATIONS
- E6.2 PANEL SCHEDULES
- E6.3 LUMINAIRE SCHEDULES
- E7.1 DETAILS
- E7.2 DETAILS
- E7.3 DETAILS
- E.8.1 T24
- E.8.2 T24
- E.8.3 T24
- E.8.4 T24

#### PLUMBING

- P0.1 COVER SHEET
- P0.2 SCHEDULE
- P2.0 FLOOR PLAN-FOUNDATION - OVERALL
- P2.1 FLOOR PLAN-LEVEL 1 - OVERALL
- P2.2 FLOOR PLAN-LEVEL 2 - OVERALL
- P2.3 FLOOR PLAN-LEVEL 3 - OVERALL
- P2.4 PLUMBING ROOF OVERALL
- P4.1 PLUMBING PIPING DIAGRAM
- P8.1 PLUMBING DETAILS

STAMP



ISSUE DATE:

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FACTORY



SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:  
EL CAMINO APARTMENTS

ADDRESS:  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:  
PRINCE STREET PARTNERS  
P.O. BOX 1071  
PALO ALTO, CA 94302

DRAWING:  
PROJECT INFO

PROJ. NO.: SHEET STATUS:  
DWG. DATE: 11/06/2020 CAD FILE:  
1  
PLOT DATE: 11/06/2020 REVISION:  
1  
DESIGNER: JESSIE SODI: A-0.0  
CHECKED: OF  
DRAWN: CHAD











SOUTHEAST VIEW FROM EL CAMINO



SMOOTH INTEGRAL COLOR  
STUCCO - WHITE



STAINED WOOD SOFFITS



DARK BRONZE WINDOWS WITH  
EXTERNAL MUNTINS



DARK BRONZE ALUMINUM  
STOREFRONT SYSTEM



ARCHITECTURAL GLAZED  
THINBRICK -  
ELGIN BUTLER, 2 1/2" X 11 1/2"  
COLOR MIX: STAINED WALNUT,  
BURNT BRICK, COGNAC



JAMES HARDIE ARTISAN  
FIBER CEMENT BOARD SIDING  
SHIPLAP, 9" EXPOSURE



JAMES HARDIE ARTISAN FIBER  
CEMENT BOARD SIDING  
LAP, 4" EXPOSURE



DARK BRONZE ALUMINUM  
TRIM, PLANTER BOXES AND  
AWNINGS



BRASS SCONCE  
BK OLYMPUS



ROLLING SECURITY GRILL  
RAL POWDER COAT  
MATCH STOREFRONT  
FRAMES



STREET VIEW AT LOBBY ENTRY



REAR FACADE AND GARDEN

STAMP



ISSUE DATE:

PERMIT SUBMITTAL

10/20/2021

LOGO



FACTORY



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PROJECT:  
EL CAMINO APARTMENTS

ADDRESS:  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:  
RENDERINGS

These drawings are prepared for the purpose of illustrating the proposed project and are not to be used for any other purpose without the written consent of the architect.

PROJ. NO. SHEET STATUS:

DWG. DATE: 10/20/21 CAD FILE:

PLOT DATE: 10/20/21 REVISION:

ORIGINAL SHEET SIZE: 11x17

DRAWN BY: DWG. NO. OF

10/20/21

TORILANDERSON.COM





1162 EL CAMINO  
SUBJECT PROPERTY

**AERIAL PHOTO**



1194 EL CAMINO  
ADJACENT PROPERTY

1162 EL CAMINO  
SUBJECT PROPERTY

1150 EL CAMINO  
ADJACENT PROPERTY

**EXISTING STREET VIEW**



1194 EL CAMINO  
ADJACENT PROPERTY

1162 EL CAMINO  
SUBJECT PROPERTY

1150 EL CAMINO  
ADJACENT PROPERTY

**PROPOSED PROJECT STREET VIEW**

**STAMP**

**ISSUE DATE:**

**PERMIT SUBMITTAL** 10/20/2021

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6114 LASALLE AVENUE #552, OAKLAND CA 94611  
TORY LONG, AIA - 415.906.6503 - TLONG@CHXTD.COM

**FACILITY**

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PHONE: 951.943.5393  
FAX: 951.943.2211

**STATE APPROVAL STAMP:**

**PROJECT:**  
EL CAMINO APARTMENTS

**ADDRESS:**  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

**CLIENT:**  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

**DRAWING:**  
EXISTING PHOTOS &  
PROPOSED STREET VIEW

THIS PLAN AND CONSTRUCTION PERMITS ARE NOT FOR CONSTRUCTION PURPOSES. THEY ARE FOR INFORMATIONAL PURPOSES ONLY. ANY CHANGES TO THE PERMITS MUST BE APPROVED BY THE CITY OF MENLO PARK. THE CITY OF MENLO PARK IS NOT RESPONSIBLE FOR ANY CHANGES TO THE PERMITS. THE CITY OF MENLO PARK IS NOT RESPONSIBLE FOR ANY CHANGES TO THE PERMITS. THE CITY OF MENLO PARK IS NOT RESPONSIBLE FOR ANY CHANGES TO THE PERMITS.

**PROJ. NO.** SHEET STATUS:

**DWG. DATE:** 10/20/2021 **CAD FILE:**

**PLOT DATE:** 10/20/2021 **REVISION:**

**ORIGINAL SHEET SIZE:** 11x17

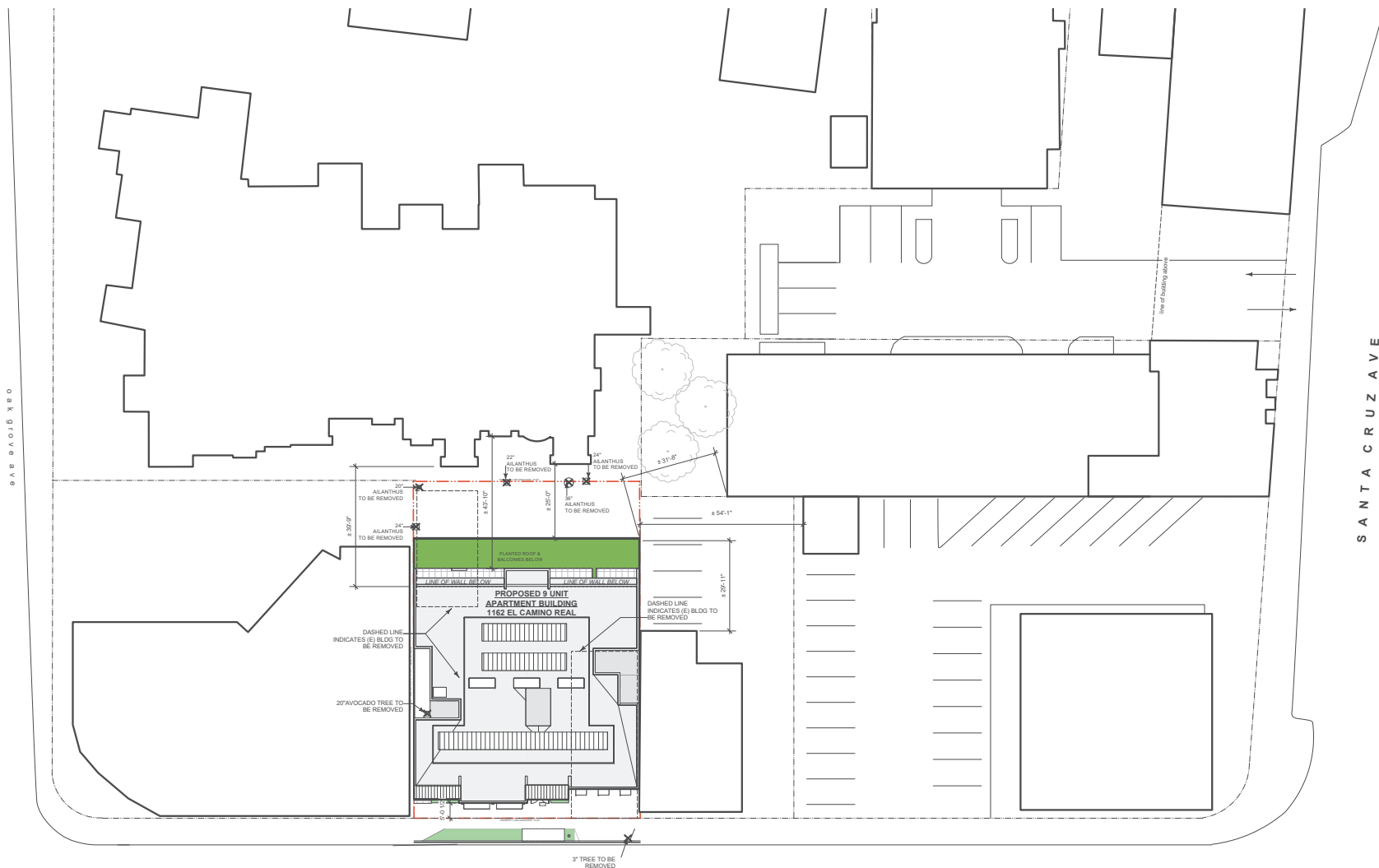
**DRAWN BY:** CHXD TL

**CHXD TL**

**A-0.2**

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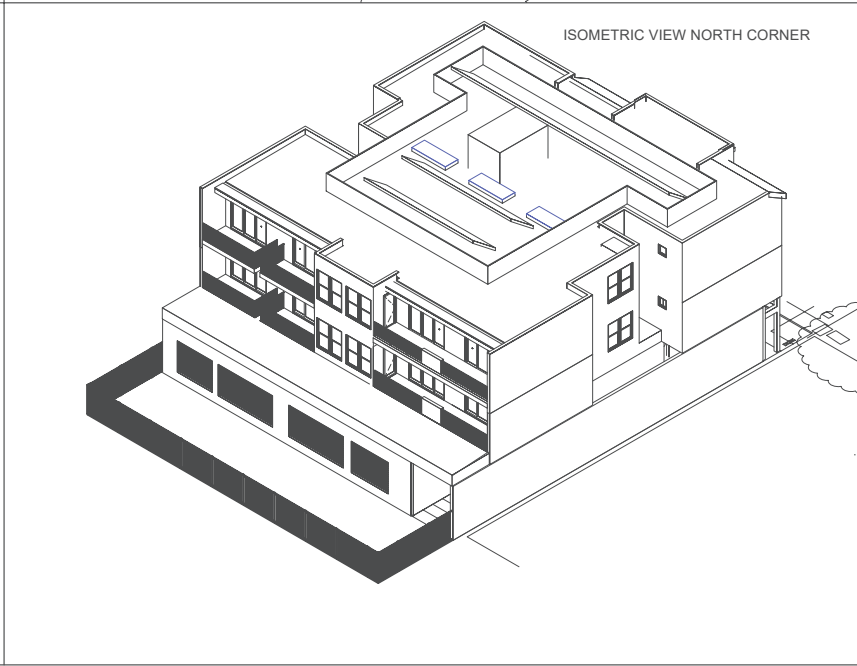
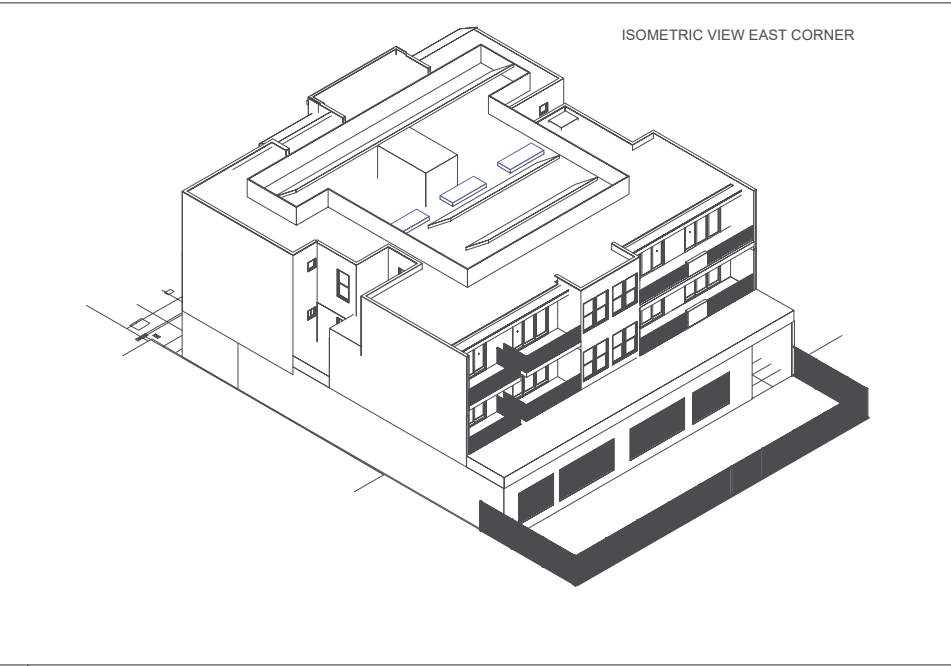
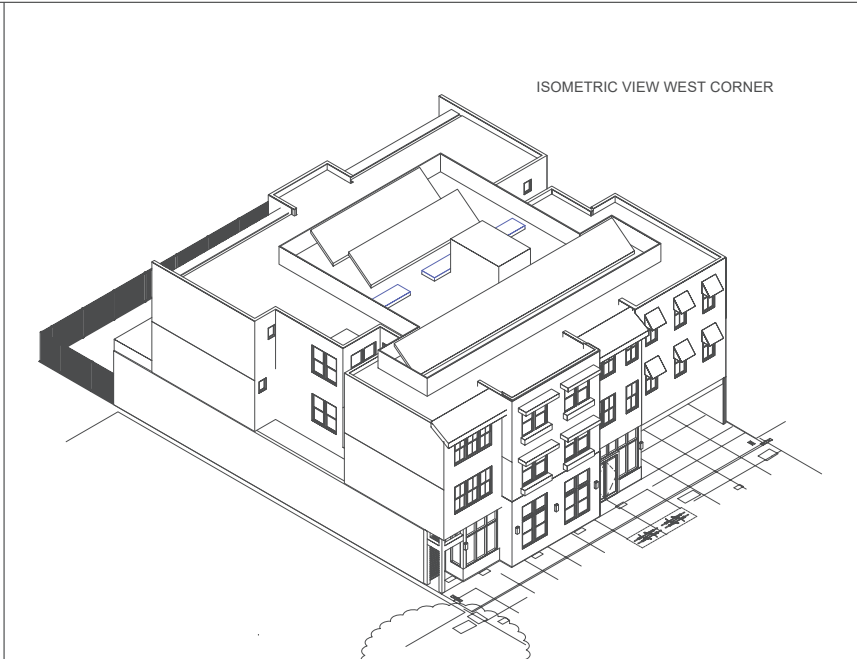
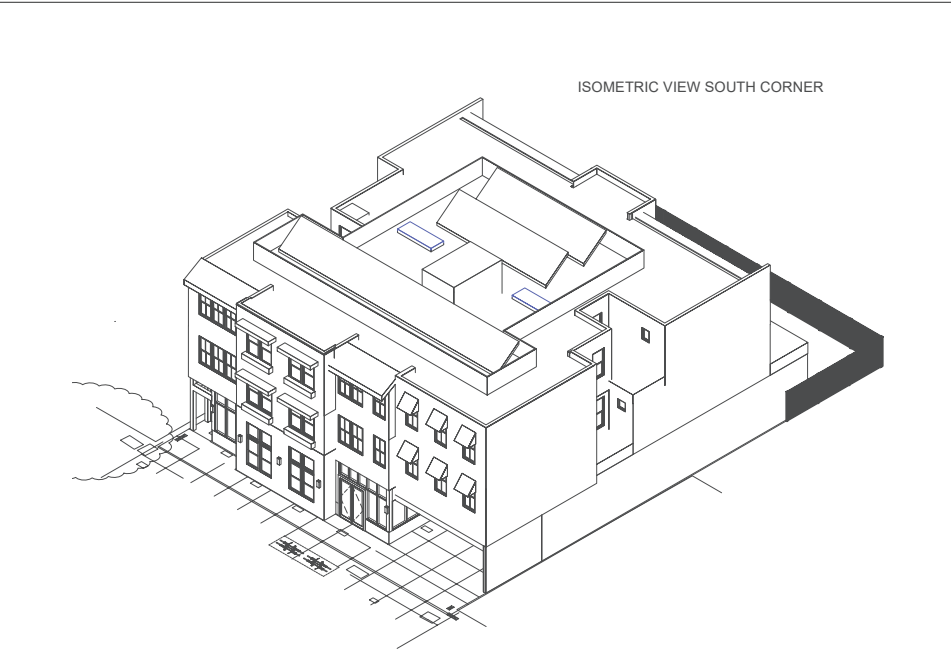




|   |                   |
|---|-------------------|
| 1 | PROJECT AREA PLAN |
|---|-------------------|

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**STAMP**

**ISSUE DATE:**

**PERMIT SUBMITTAL** 10/20/2021

**LOGO**

**ch x**  
prefabricated  
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TORY LONG, INC. - 415.955.9530 - TLO@CHXTLO.COM

**FACTORY**

**SILVER CREEK**  
SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

**STATE APPROVAL STAMP:**

**PROJECT:**  
EL CAMINO APARTMENTS

**ADDRESS:**  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

**CLIENT:**  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

**DRAWING:**  
MASSING

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**PROJ. NO.** **SHEET STATUS:**

**ISS. DATE:** 10/20/2021 **CAD FILE:**

**PLOT DATE:** 10/20/2021 **REVISION:**

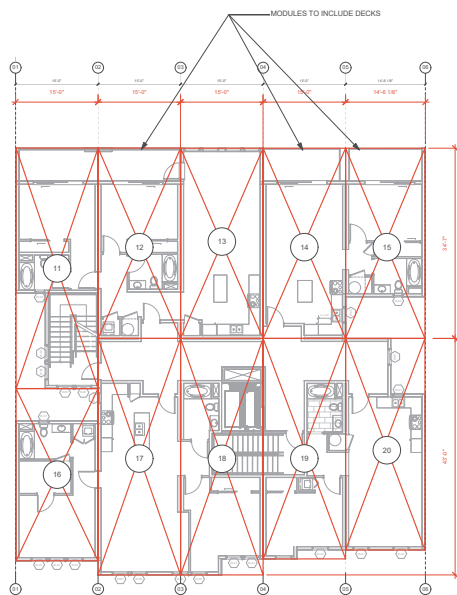
**ORIGINAL SHEET SIZE:** 11x17

**DRAWN BY:** CHLO TL **OF**

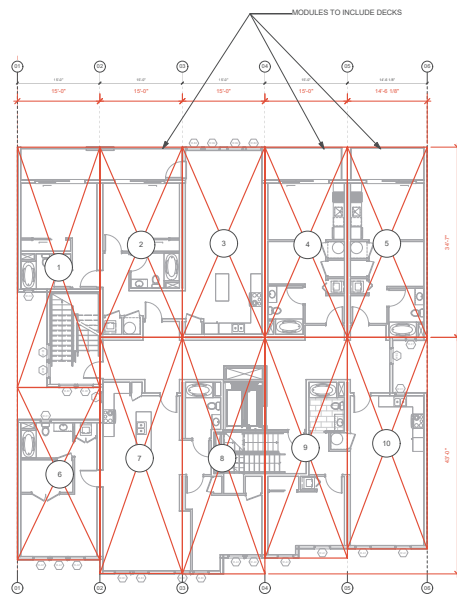
**A-0.4**

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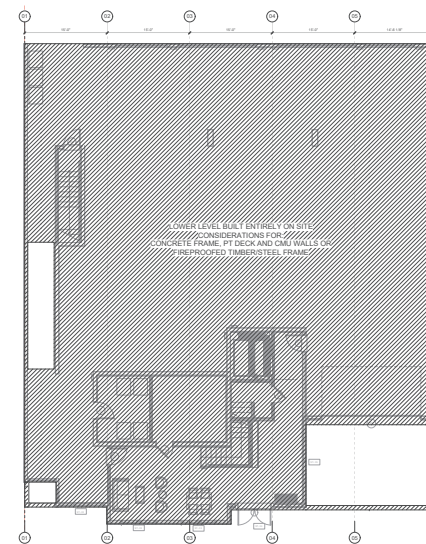




3 LEVEL 3 - MODULAR DIAGRAM SCALE: 3/32"=1'-0"



2 LEVEL 2 - MODULAR DIAGRAM SCALE: 3/32"=1'-0"



1 LEVEL ONE - SITE BUILT SCALE: 3/32"=1'-0"

ISSUE DATE:

PERMIT SUBMITTAL 10/20/2021

LOGO

6114 LASALLE AVENUE #552, OAKLAND, CA 94611  
TONY LONG, AIA - 415.905.6530 - TONY@CHXTD.COM

FACILITY

SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PIERIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:

EL CAMINO APARTMENTS

ADDRESS:

1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:

PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:

MODULAR DIAGRAMS

PROJ. NO. SHEET STATUS:

DWG. DATE: 09/09/2021 CAD FILE:

PLOT DATE: 09/09/2021 REVISION:

ORIGINAL SHEET SIZE: 11x17

DRAWN BY: DWG. TL

A-0.5

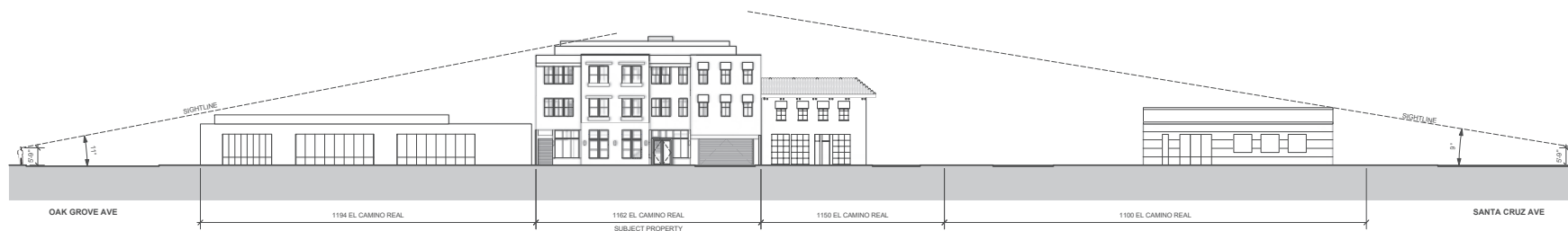
OF

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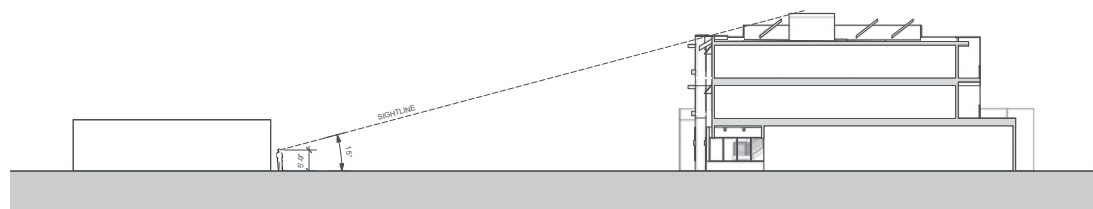




5 EL CAMINO REAL STREETSCAPE



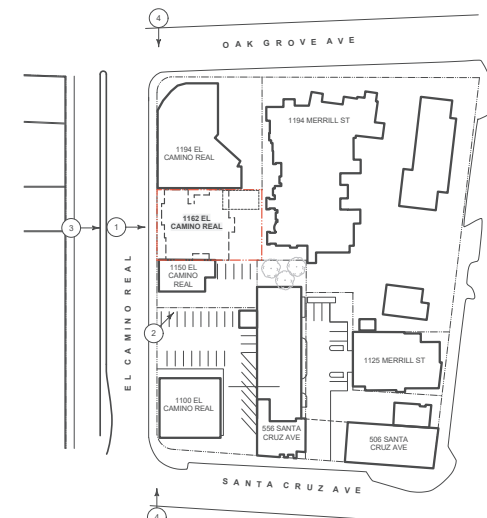
4 OAK GROVE AVE TO SANTA CRUZ AVE  
SCALE: 1/2" = 1'-0"



3 OPPOSITE SIDE OF STREET  
SCALE: 1/16" = 1'-0"



2 45° ANGLE SAME SIDE OF STREET  
SCALE: 1/16" = 1'-0"



1 SIGHTLINE DIAGRAM KEY  
SCALE: 1/150



ISSUE DATE:

PERMIT SUBMITTAL 10/20/2021

LOGO



FACTORY



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MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:  
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P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:  
LINE OF SIGHT DIAGRAM

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PROJ. NO. SHEET STATUS:  
DWG. DATE: 10/20/2021 CAD FILE:  
PLOT DATE: 10/20/2021 REVISION:  
ORIGINAL SHEET SIZE:  
A0

DRAWN BY: CHWJL  
CHECKED BY: CHWJL  
DATE: 10/20/2021

SCALE: AS NOTED

1 LINE OF SIGHT DIAGRAM





**LOBBY TRANSPARENCY CALCULATION**

TOTAL LOBBY FACADE AREA:  
36.25' x 12.00' = 435 SF

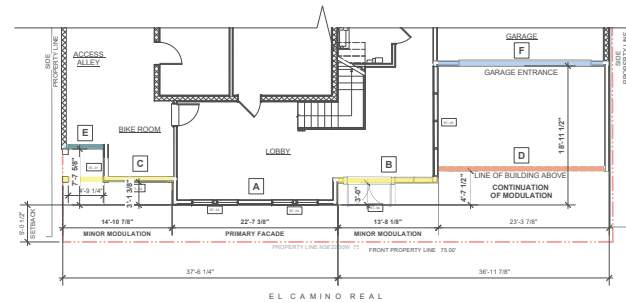
LOBBY TRANSPARENCY AREA:  
60' x 60' x 14' + 17' = 231 SF

TOTAL TRANSPARENCY: 57%  
231 SF / 435 SF

50% MIN REQ



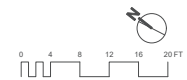
SCALE: 1/8" = 1'-0"



FRONT FACADE PLAN



FRONT FACADE ELEVATION



SCALE: 1/8" = 1'-0"

**STAMP**

**ISSUE DATE:**

**PERMIT SUBMITTAL** 10/20/2021

**LOGO**

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prefabricated  
6114 LASALLE AVENUE #552 OAKLAND CA 94611  
TORY LONG, INC. - 415.955.5533 - TLO@CHX.COM

**FACTORY**

**SILVER CREEK**  
SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

**STATE APPROVAL STAMP:**

**PROJECT:**  
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**ADDRESS:**  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

**CLIENT:**  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

**DRAWING:**  
MODULATION/  
TRANSPARENCY DIAGRAMS

THIS PLAN AND TRANSPARENCY DIAGRAM ARE NOT FOR CONSTRUCTION. THEY ARE FOR PERMITTING PURPOSES ONLY. THEY ARE NOT TO BE USED FOR ANY OTHER PURPOSE. ANY CHANGES TO THIS PLAN MUST BE APPROVED BY THE ARCHITECT. ANY CHANGES TO THIS TRANSPARENCY DIAGRAM MUST BE APPROVED BY THE ARCHITECT. ANY CHANGES TO THIS PLAN OR TRANSPARENCY DIAGRAM MUST BE APPROVED BY THE ARCHITECT.

**PROJ. NO.** **SHEET STATUS:**

**DATE:** 10/20/21 **DATE:**

**PLAT DATE:** 10/20/21 **REVISION:**

**ORIGINAL SHEET SIZE:** **A-0.7**

**DATE:** 10/20/21 **DATE:** 10/20/21

**TORY LONG DESIGN 2021**



#### LEVEL 3 - BLDG AREA

##### CIRCULATION

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| A               | 9.64          | 17.31          | 166.87             |
| B               | 30.02         | 7.09           | 212.84             |
| C               | 6.56          | 2.81           | 18.43              |
| D               | 6.34          | 2.36           | 14.96              |
| E               | 5.23          | 9.90           | 51.79              |
| F               | 10.50         | 7.69           | 80.75              |
| G               | 7.66          | 10.07          | 77.13              |
| H               | 14.92         | 17.10          | 255.13             |
| H1              | 1.74          | 7.51           | 13.07              |
| <b>SUBTOTAL</b> |               |                | <b>889.96</b>      |

##### DWELLING

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| I               | 30.00         | 20.46          | 613.80             |
| J               | 15.00         | 5.95           | 89.25              |
| K               | 8.45          | 2.81           | 23.74              |
| L               | 15.00         | 35.20          | 528.00             |
| M               | 28.51         | 21.13          | 602.85             |
| N               | 5.23          | 5.33           | 27.88              |
| O               | 8.61          | 7.52           | 64.82              |
| P               | 13.78         | 26.39          | 361.21             |
| Q               | 8.28          | 17.10          | 141.59             |
| R               | 9.55          | 13.68          | 130.84             |
| S               | 6.18          | 15.33          | 94.74              |
| T               | 7.47          | 15.33          | 114.62             |
| U               | 22.52         | 18.26          | 411.22             |
| V               | 15.00         | 25.58          | 383.70             |
| W               | 8.09          | 2.36           | 19.09              |
| X               | 8.10          | 2.36           | 19.12              |
| Y               | 20.79         | 14.70          | 305.61             |
| Z               | 1.74          | 7.23           | 12.58              |
| <b>SUBTOTAL</b> |               |                | <b>4004.16</b>     |

LEV 3 TOTAL GROSS 4894.11

LEV 3 TOTAL F.A.R. 4894.11

##### LEVEL 3 - BALCONIES

|              | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|--------------|---------------|----------------|--------------------|
| AA           | 30.00         | 6.00           | 180.00             |
| BB           | 14.00         | 6.00           | 84.00              |
| CC           | 14.00         | 6.00           | 84.00              |
| <b>TOTAL</b> |               |                | <b>348.00</b>      |

### 4 LEVEL 3 AREA CALCULATIONS

SCALE: 1/8" = 1'-0"

#### LEVEL 2 - BLDG AREA

##### CIRCULATION

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| A               | 9.64          | 17.31          | 166.87             |
| B               | 30.02         | 7.09           | 212.84             |
| C               | 6.56          | 2.81           | 18.43              |
| D               | 6.34          | 2.36           | 14.96              |
| E               | 5.23          | 9.90           | 51.79              |
| F               | 10.50         | 7.69           | 80.75              |
| G               | 7.66          | 10.07          | 77.13              |
| H               | 14.92         | 17.10          | 255.13             |
| H1              | 1.74          | 7.51           | 13.07              |
| <b>SUBTOTAL</b> |               |                | <b>904.99</b>      |

##### DWELLING

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| I               | 30.00         | 20.46          | 613.80             |
| J               | 15.00         | 5.95           | 89.25              |
| K               | 8.45          | 2.81           | 23.74              |
| L               | 15.00         | 35.20          | 528.00             |
| M               | 7.32          | 20.24          | 148.04             |
| N               | 14.07         | 20.47          | 288.31             |
| O               | 7.52          | 20.24          | 152.08             |
| P               | 13.78         | 26.39          | 361.21             |
| Q               | 8.28          | 17.10          | 141.59             |
| R               | 9.55          | 13.68          | 130.84             |
| S               | 6.18          | 15.33          | 94.74              |
| T               | 7.47          | 15.33          | 114.62             |
| U               | 22.52         | 18.26          | 411.22             |
| V               | 15.00         | 25.58          | 383.70             |
| W               | 8.09          | 2.36           | 19.09              |
| X               | 8.10          | 2.36           | 19.12              |
| Y               | 20.79         | 14.70          | 305.61             |
| Z               | 1.74          | 7.23           | 12.58              |
| <b>SUBTOTAL</b> |               |                | <b>4101.85</b>     |

LEV 2 TOTAL GROSS 5006.04

LEV 2 TOTAL F.A.R. 5006.04

##### LEVEL 2 - BALCONIES

|              | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|--------------|---------------|----------------|--------------------|
| AA           | 30.00         | 6.00           | 180.00             |
| BB           | 14.00         | 6.00           | 84.00              |
| CC           | 14.00         | 6.00           | 84.00              |
| <b>TOTAL</b> |               |                | <b>348.00</b>      |

### 3 LEVEL 2 AREA CALCULATIONS

SCALE: 1/8" = 1'-0"

#### LEVEL 1 - BLDG AREA

##### EXCEPTIONS:

UNCOVERED ALLEY, PARKING, DWY, TRASH, BIKES

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| A               | 23.38         | 14.43          | 337.37             |
| B               | 23.38         | 16.05          | 375.48             |
| C               | 37.13         | 52.24          | 1949.87            |
| D               | 37.13         | 59.64          | 2215.53            |
| E               | 4.78          | 23.58          | 112.71             |
| F               | 9.56          | 24.03          | 230.51             |
| G               | 8.26          | 13.33          | 110.11             |
| H               | 5.51          | 23.03          | 127.32             |
| H1              | 5.51          | 12.17          | 67.06              |
| <b>SUBTOTAL</b> |               |                | <b>4821.95</b>     |

TOTAL EXCEPTIONS 4821.95

##### LOBBY, CIRC, ELEC, COVERED ALLEY

|                 | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|-----------------|---------------|----------------|--------------------|
| H3              | 5.51          | 4.44           | 24.46              |
| J               | 13.74         | 52.15          | 717.74             |
| K               | 22.45         | 14.29          | 320.81             |
| L               | 5.51          | 14.29          | 78.74              |
| M               | 4.78          | 36.05          | 173.32             |
| N               | 5.51          | 28.42          | 156.59             |
| N1              | 14.08         | 13.33          | 187.82             |
| <b>SUBTOTAL</b> |               |                | <b>1382.48</b>     |

LEV 1 TOTAL GROSS 6304.43

LEV 1 TOTAL F.A.R. 1382.48

##### LEVEL 1 - OPEN SPACE

###### PUBLIC OPEN SPACE: FRONT

|                     | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|---------------------|---------------|----------------|--------------------|
| 1                   | 27.65         | 7.94           | 219.54             |
| 2                   | 23.31         | 5.64           | 131.46             |
| 3                   | 9.56          | 8.14           | 77.82              |
| 4                   | 5.46          | 8.14           | 44.58              |
| 5                   | 23.85         | 1.64           | 39.11              |
| <b>TOTAL PUBLIC</b> |               |                | <b>573.39</b>      |

###### COMMON OPEN SPACE: REAR

|                     | WIDTH<br>(FT) | HEIGHT<br>(FT) | TOTAL AREA<br>(SF) |
|---------------------|---------------|----------------|--------------------|
| 6                   | 75.00         | 19.34          | 1440.00            |
| <b>TOTAL COMMON</b> |               |                | <b>1440.00</b>     |

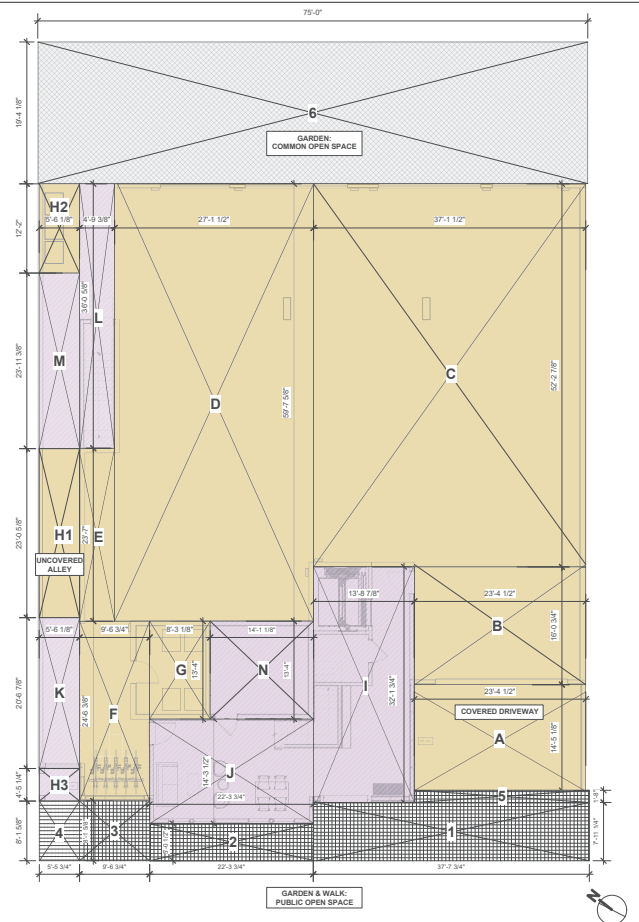
TOTAL OPEN SPACE 2023.89

100 SF UNIT X 9 UNITS = 900 SF REQ

20% REQ. FOR SITE: 8374 (0.20) = 1674 SF REQ

### 2 LEVEL 1 AREA CALCULATIONS

### 1 AREA SUMMARY



| BUILDING AREA SUMMARY |                     |              |
|-----------------------|---------------------|--------------|
|                       | TOTAL AREA          | TOTAL F.A.R. |
| LEVEL 1               | 6,304               | 1,382        |
| LEVEL 2               | 5,006               | 5,006        |
| LEVEL 3               | 4,894               | 4,894        |
|                       | 16,204 SF           | 11,282 SF    |
|                       | 11,305 SF ALLOWABLE |              |

STAMP

ISSUE DATE:

PERMIT SUBMITTAL 10/20/2021

LOGO

6114 LASALLE AVENUE #555 OAKLAND CA 94611  
TORY LONG, INC. - 415.955.6500 - TLONG@CHXLD.COM

FACTORY

SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:

EL CAMINO APARTMENTS

ADDRESS:

1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:

PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:

FLOOR AREA & OPEN SPACE

PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DESIGNER:

CHAITIN H. CHAITIN  
P.L.L.C.

DATE:

10/20/2021

REVISION:

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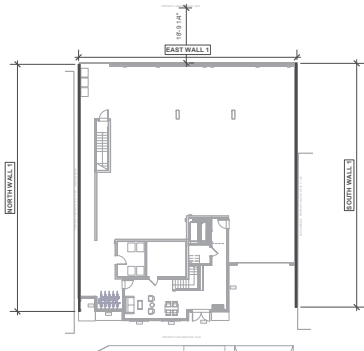
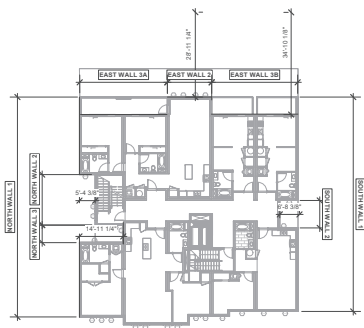
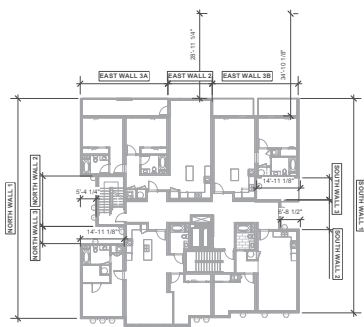
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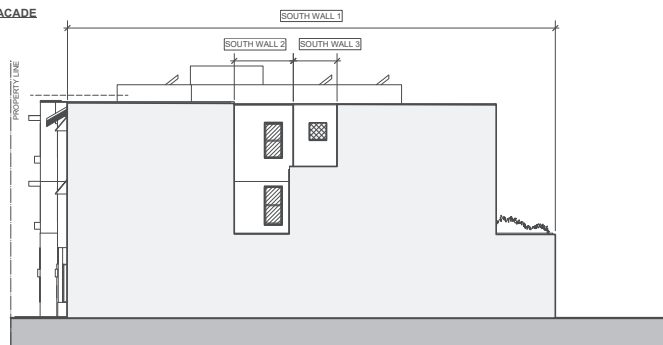






LEVEL 1 - LOBBY/GARAGE

## SOUTH FACADE



**SOUTH WALL 1**  
BLIND WALL, NO OPENINGS

**SOUTH WALL 2**  
6'-8" FROM PL  
213 SF \* 25% = 53 SF ALLOWED  
38 SF TOTAL OPENINGS  
COMPLIES

**SOUTH WALL 3**  
14'-11" FROM PL  
78 SF \* 45% = 35 SF ALLOWED  
8 SF TOTAL OPENING  
COMPLIES

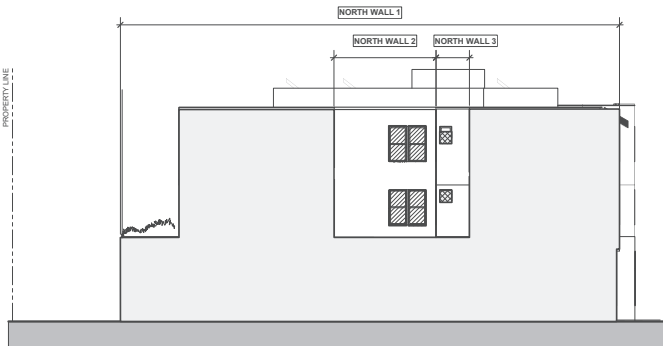
## EAST FACADE



**EAST WALL 1**  
16'-9" FROM PL  
936 SF \* 75% = 702 SF ALLOWED  
451 SF TOTAL OPENINGS  
COMPLIES

**EAST WALL 2, 3A & 3B**  
28'-11" 3A-10" FROM PL  
UNLIMITED OPENING AREA

## NORTH FACADE



**NORTH WALL 1**  
BLIND WALL, NO OPENINGS

**NORTH WALL 2**  
5'-4" FROM PL  
378 SF \* 25% = 94.5 SF ALLOWED  
72 SF TOTAL OPENINGS

**NORTH WALL 3**  
14'-11" FROM PL  
144 SF \* 45% = 65 SF ALLOWED  
8 SF TOTAL OPENING  
COMPLIES

## LEGEND

### UNPROTECTED SPRINKLERED OPENINGS

|  |               |               |
|--|---------------|---------------|
|  | a - 0' - 3'   | NOT PERMITTED |
|  | b - 3' - 5'   | 15%           |
|  | c - 5' - 10'  | 25%           |
|  | d - 10' - 15' | 45%           |
|  | e - 15' - 20' | 75%           |
|  | f - 20' - 25' | UNLIMITED     |

## STAMP



## ISSUE DATE:

PERMIT SUBMITTAL

10/20/2021

## LOGO



## FACTORY



SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

## STATE APPROVAL STAMP:

## PROJECT:

EL CAMINO APARTMENTS

## ADDRESS:

1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

## CLIENT:

PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

## DRAWING:

FACADE OPENING  
CALCULATIONS

THIS DRAWING IS THE PROPERTY OF THE ARCHITECT AND IS NOT TO BE REPRODUCED OR COPIED IN ANY MANNER WITHOUT THE WRITTEN PERMISSION OF THE ARCHITECT. THE ARCHITECT ASSUMES NO LIABILITY FOR ANY DAMAGE OR INJURY TO PERSONS OR PROPERTY ARISING FROM THE USE OF THIS DRAWING. THE ARCHITECT'S RESPONSIBILITY IS LIMITED TO THE DESIGN AND CONSTRUCTION OF THE FACADE OPENING CALCULATIONS. THE ARCHITECT DOES NOT WARRANT THE ACCURACY OF THE INFORMATION PROVIDED BY THE CLIENT OR THE RESULTS OF THE CALCULATIONS. THE ARCHITECT'S LIABILITY IS LIMITED TO THE DESIGN AND CONSTRUCTION OF THE FACADE OPENING CALCULATIONS.

## PREP. NO.:

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## SHEET STATUS:

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## DESIGN DATE:

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## DESIGNER:

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## DESIGNER'S SIGNATURE:

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## DESIGNER'S TITLE:

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## DESIGNER'S FIRM:

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## DESIGNER'S ADDRESS:

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## DESIGNER'S PHONE:

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## DESIGNER'S FAX:

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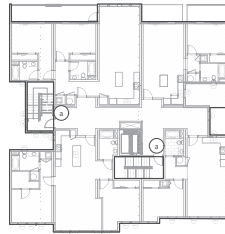
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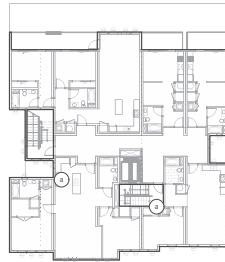
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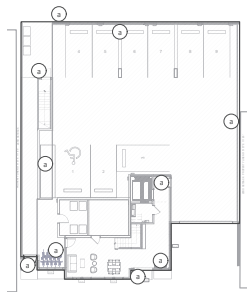




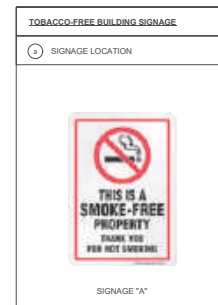
LEVEL 3 - RESIDENTIAL UNITS



LEVEL 2 - RESIDENTIAL UNITS

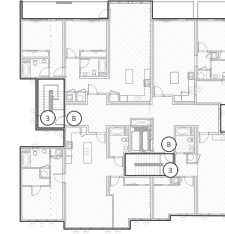


LEVEL 1 - LOBBY/GARAGE

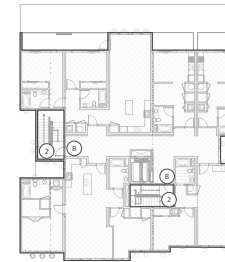


SIGNAGE "A"

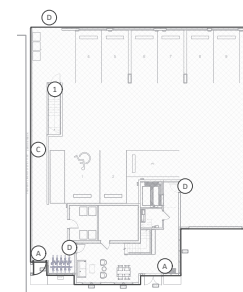
NOTE: SMOKING PROHIBITED ON ENTIRE PROPERTY.



LEVEL 3 - RESIDENTIAL UNITS



LEVEL 2 - RESIDENTIAL UNITS



LEVEL 1 - LOBBY/GARAGE

- DOOR SIGNAGE**
- A "EXIT"
  - B "EXIT STAIR DOWN"
  - C "EXIT ROUTE"
  - D "TO EXIT"

- LANDING SIGNAGE**
- 1 FIRST FLOOR, EXIT LEFT,
  - 2 SECOND FLOOR, EXIT DOWN
  - 3 THIRD FLOOR, EXIT DOWN,

**STAMP**

**ISSUE DATE:**

PERMIT SUBMITTAL 10/20/2021

**LOGO**

6114 LASALLE AVENUE #552 OAKLAND CA 94611  
TOBY LONG, AIA - 415.906.6530 - TOLBY@CHXSTUDIO.COM

**FACTORY**

SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

**STATE APPROVAL STAMP:**

**PROJECT:**  
EL CAMINO APARTMENTS

**ADDRESS:**  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

**CLIENT:**  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

**DRAWING:**  
SIGNAGE

These plans are submitted for review and not for construction. The owner is responsible for obtaining all necessary permits and approvals. The architect is not responsible for the construction of the building. The architect is not responsible for the construction of the building. The architect is not responsible for the construction of the building.

**REVISIONS:**

| NO. | DATE       | DESCRIPTION       |
|-----|------------|-------------------|
| 1   | 10/20/2021 | ISSUED FOR PERMIT |

**DESIGNER:** CHXSTUDIO

**DATE:** 10/20/2021

**PROJECT:** EL CAMINO APARTMENTS

**SHEET NO.:** A-0.11

**TOTAL SHEETS:** 11













AIA  
California

# 2019 CALIFORNIA GREEN BUILDING STANDARDS CODE

## RESIDENTIAL MANDATORY MEASURES, SHEET 1 (January 2020, Includes August 2019 Supplement)

|   |    |              |   |   |    |              |
|---|----|--------------|---|---|----|--------------|
| Y | NA | SECTION PART | CHAPTER 3<br>GREEN BUILDING<br>SECTION 301 GENERAL  | Y | NA | SECTION PART |
|   |    |              | <b>301.1 SCOPE.</b> Buildings shall be designed to include the green building measures specified as mandatory in the applicable provisions of this code. Voluntary green building measures are encouraged but are not required unless adopted by a city, county, or city and county as specified in Section 101.7.  |   |    |              |
|   |    |              | <b>301.1 Additions and alterations.</b> [HCD] The mandatory provisions of Chapter 4 shall be applied to additions or alterations of existing residential buildings where the addition or alteration increases the building's conditioned area, volume, or size. The requirements shall apply only to or within the interior of the specific area of the addition or alteration.   |   |    |              |
|   |    |              | <b>Note:</b> On and after January 1, 2014, residential buildings undergoing permitted alterations, additions, or improvements shall replace noncompliant plumbing fixtures with water-conserving plumbing fixtures. Plumbing fixture replacement is required prior to issuance of a certificate of final completion, certificate of occupancy or final permit approval by the local building department. See Civil Code Section 1191.1, et seq., for the definition of a noncompliant plumbing fixture. Types of residential buildings affected and other important enactment dates.  |   |    |              |
|   |    |              | <b>301.2 LOW-RISE AND HIGH-RISE RESIDENTIAL BUILDINGS.</b> [HCD] The provisions of individual sections of CALGreen may apply to either low-rise residential buildings or high-rise residential buildings, or both. Individual sections will be designated by banners to indicate where the section applies specifically to low-rise only (LR) or high-rise only (HR). When the section applies to both low-rise and high-rise buildings, no banner will be used.  |   |    |              |
|   |    |              | <b>SECTION 302 MIXED OCCUPANCY BUILDINGS</b>  |   |    |              |
|   |    |              | <b>302.1 MIXED OCCUPANCY BUILDINGS.</b> In mixed occupancy buildings, each portion of a building shall comply with the specific green building measures applicable to each specific occupancy.  |   |    |              |
|   |    |              | <b>ABREVIATION DEFINITIONS:</b><br>HCD Department of Housing and Community Development<br>BSC Building Standards Commission<br>DGA-SS Division of the State Architect, Structural Safety<br>CHSDP Office of Sustainable Health Planning and Development<br>LR Low Rise<br>HR High Rise<br>AA Additions and Alterations<br>N New   |   |    |              |
|   |    |              | <b>CHAPTER 4<br/>RESIDENTIAL MANDATORY MEASURES</b>   |   |    |              |
|   |    |              | <b>DIVISION 4.1 PLANNING AND DESIGN</b>   |   |    |              |
|   |    |              | <b>SECTION 4.102 DEFINITIONS</b>  |   |    |              |
|   |    |              | <b>4.102.1 DEFINITIONS</b><br>The following terms are defined in Chapter 2 (and are included here for reference):   |   |    |              |
|   |    |              | <b>FRENCH DRAIN.</b> A trench, hole or other depressed area loosely filled with rock, gravel, fragments of brick or similar porous material used to collect or channel drainage water runoff.   |   |    |              |
|   |    |              | <b>WATTLIES.</b> Wattles are used to induce sediment in runoff. Wattles are often constructed of natural plant materials such as hay, straw or similar material shaped in the form of tubes and placed on a downslope slope. Wattles are also used for perimeter and inlet controls.  |   |    |              |
|   |    |              | <b>4.106 SITE DEVELOPMENT</b>   |   |    |              |
|   |    |              | <b>4.106.1 GENERAL.</b> Professional use of available natural resources shall be accomplished through evaluation and careful planning to minimize negative effects on the site and adjacent areas. Preservation of slopes, management of storm water drainage and erosion control shall comply with this section.   |   |    |              |
|   |    |              | <b>4.106.2 STORM WATER DRAINAGE AND RETENTION DURING CONSTRUCTION.</b> Projects which disturb less than one acre of soil and are not part of a larger common plan of development which in total disturbs one acre or more shall manage storm water drainage during construction. In order to manage storm water drainage during construction, one or more of the following measures shall be implemented to prevent flooding of adjacent property, prevent erosion and retain rain runoff on the site:<br>1. Retention basins of sufficient size shall be utilized to retain storm water on the site.<br>2. Where storm water is conveyed to a public drainage system, collection point, gutter or other disposal method, water shall be filtered by use of a barrier system, wattle or other method approved by the enforcing agency.<br>3. Compliance with a locally enacted storm water management ordinance.<br><b>Note:</b> Refer to the State Water Resources Control Board for projects which disturb one acre or more of soil, or are part of a larger common plan of development which in total disturbs one acre or more of soil, or are part of a larger common plan of development which in total disturbs one acre or more of soil.<br>(Website: <a href="https://www.waterboards.ca.gov/water_issues/programs/stormwater/construction.html">https://www.waterboards.ca.gov/water_issues/programs/stormwater/construction.html</a> ) |   |    |              |
|   |    |              | <b>4.106.3 GRASSING AND PAVING.</b> Construction plans shall indicate how the site grading or drainage system will manage all surface water flow to keep water from entering buildings. Examples of methods to manage surface water include, but are not limited to, the following:<br>1. Swales<br>2. Water collection and disposal systems<br>3. French drains<br>4. Water retention gardens<br>5. Other water measures which keep surface water away from buildings and aid in groundwater recharge.<br><b>Exception:</b> Additions and alterations not altering the drainage path.  |   |    |              |
|   |    |              | <b>4.106.4 Electric vehicle (EV) charging for new construction.</b> New construction shall comply with Sections 4.106.4.1, 4.106.4.2, or 4.106.4.3 to facilitate future installation and use of EV chargers. Electric vehicle supply equipment (EVSE) shall be installed in accordance with the California Electrical Code, Article 625.  |   |    |              |
|   |    |              | <b>Exceptions:</b><br>1. On a case-by-case basis, where the local enforcing agency has determined EV charging and infrastructure are not feasible based upon any of the following conditions:<br>1.1 Where there is no commercial power supply.<br>1.2 Where there is evidence substantiating that meeting the requirements will alter the local utility infrastructure design requirements on the utility side of the meter so as to increase the utility side load to the homeowner or the developer by more than \$400.00 per dwelling unit.<br>2. Accessory Dwelling Units (ADU) and Junior Accessory Dwelling Units (JADU) without additional parking facilities.  |   |    |              |
|   |    |              | <b>4.106.4.1 New one- and two-family dwellings and townhouses with attached private garages.</b> For each dwelling unit, install a listed roadway to accommodate a dedicated 208/240-volt branch circuit. The roadway shall not be less than three (3) feet wide (measured at each inside diameter). The roadway shall originate at the main service or subpanel and shall terminate into a listed cabinet, box or other enclosure in close proximity to the proposed location of an EV charger. Required roadway and related components that are planned to be installed underground, encased, inaccessible or in concealed areas shall provide capacity to install a 40-ampere minimum dedicated branch circuit and shall be reserved to permit installation of a branch circuit overcurrent protective device.   |   |    |              |
|   |    |              | <b>4.106.4.1.1 Identification.</b> The service panel or subpanel circuit directory shall identify the overcurrent protective device space(s) reserved for future EV charging purposes as "EV CAPABLE." The roadway termination facility shall be permanently and visibly marked as "EV CAPABLE." The roadway termination facility shall be permanently and visibly marked as "EV CAPABLE." The roadway termination facility shall be permanently and visibly marked as "EV CAPABLE."  |   |    |              |
|   |    |              | <b>4.106.4.2 New multifamily dwellings.</b> If residential parking is available, ten (10) percent of the total number of parking spaces in a building site, provided for all types of parking facilities, shall be electric vehicle charging spaces (EV spaces) capable of supporting future EVSE. Calculations for the required number of EV spaces shall be rounded up to the nearest whole number.<br><b>Note:</b><br>1. Construction documents are intended to demonstrate the project's capability and capacity for facilitating future EV charging.<br>2. There is no requirement for EV spaces to be constructed or available until EV chargers are installed or use.  |   |    |              |
|   |    |              | <b>4.106.4.3 Electric vehicle charging space (EV space) locations.</b> Construction documents shall indicate the location of proposed EV spaces. Where common use parking is provided at least one EV space shall be located in the common use parking area and shall be available for use by all residents.  |   |    |              |

| Y                              | NA                           | SECTION PART | <b>4.106.4.1.1 Electric Vehicle Charging Stations (EVCS).</b> When EV chargers are installed, EV spaces required by Section 4.106.4.2, Item 3, shall comply with at least one of the following options:<br>1. The EV space shall be located adjacent to an accessible parking space meeting the requirements of the California Building Code, Chapter 11A, to allow use of the EV charger from the accessible parking space.<br>2. The EV space shall be located on an accessible route, as defined in the California Building Code, Chapter 7, to the building.<br><b>Exception:</b> Electric vehicle charging stations designed and constructed in compliance with the California Building Code, Chapter 11A, are not required to comply with Section 4.106.4.2.1 and Section 4.106.4.2.2, Item 1.<br><b>Note:</b> Electric vehicle charging stations serving public housing are required to comply with the California Building Code, Chapter 11B.<br><b>4.106.4.2.2 Electric vehicle charging space (EV space) dimensions.</b> The EV space shall be designed to comply with the following:<br>1. The minimum length of each EV space shall be 18 feet (5486 mm).<br>2. The minimum width of each EV space shall be 9 feet (2743 mm).<br>3. One in every 25 EV spaces, but not less than one EV space, shall have an 8-foot (2438 mm) wide minimum aisle. A 5-foot (1524 mm) wide minimum aisle shall be permitted between the minimum width of the EV space is 12 feet (3683 mm).<br>a. Surface slope for this EV space and the aisle shall not exceed 1 unit vertical in 48 units horizontal (2.083 percent slope) in any direction.<br><b>4.106.4.2.3 Single EV space required.</b> Install a listed roadway capable of accommodating a 208/240-volt dedicated branch circuit. The roadway shall not be less than trade size 1 nominal 1-inch inside diameter. The roadway shall originate at the main service or subpanel and shall terminate into a listed cabinet, box or enclosure in close proximity to the proposed location of the EV space. Construction documents shall identify the roadway termination point. The service panel and/or subpanel shall provide capacity to install a 40-ampere minimum dedicated branch circuit and space(s) reserved to permit installation of a branch circuit overcurrent protective device.<br><b>4.106.4.2.4 Multiple EV spaces required.</b> Construction documents shall indicate the roadway termination point and proposed location of future EV spaces and EV chargers. Construction documents shall also provide information on arrangement of future EVSE, roadway method(s), wiring schematics and electrical load calculations to verify that the electrical panel service capacity and electrical system, including any on-site distribution transformer(s), have sufficient capacity to simultaneously charge all EVs at all required EV spaces at the full rated ampacity of the EVSE. Plan design shall be based upon a 40-ampere minimum branch circuit. Required roadway and related components that are planned to be installed underground, encased, inaccessible or in concealed areas shall provide capacity to install a 40-ampere minimum branch circuit and shall be reserved to permit installation of a branch circuit overcurrent protective device space(s) reserved for future EV charging purposes as "EV CAPABLE" in accordance with the California Electrical Code.<br><b>4.106.4.2.5 Identification.</b> The service panel or subpanel circuit directory shall identify the overcurrent protective device space(s) reserved for future EV charging purposes as "EV CAPABLE" in accordance with the California Electrical Code.<br><b>4.106.4.3 New hotels and motels.</b> All newly constructed hotels and motels shall provide EV spaces capable of supporting future installation of EVSE. The construction documents shall identify the location of the EV spaces.<br><b>Notes:</b><br>1. Construction documents are intended to demonstrate the project's capability and capacity for facilitating future EV charging.<br>2. There is no requirement for EV spaces to be constructed or available until EV chargers are installed for use.<br><b>4.106.4.3.1 Number of required EV spaces.</b> The number of required EV spaces shall be based on the total number of parking spaces provided for all types of parking facilities in accordance with Table 4.106.4.3.1. Calculations for the required number of EV spaces shall be rounded up to the nearest whole number. | Y                              | NA                           | SECTION PART |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|--------------------------------|------------------------------|--------------|---|--------------------------------|------------------------------|--------------|---|-------|---|-------|---|-------|---|--------|---|---------|---|---------|----|--------------|--------------------|--|--|--|
|                                |                              |              | <b>TABLE 4.106.4.3.1</b>  |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|                                |                              |              | <table><tr><th>TOTAL NUMBER OF PARKING SPACES</th><th>NUMBER OF REQUIRED EV SPACES</th></tr><tr><td>0-9</td><td>0</td></tr><tr><td>10-25</td><td>1</td></tr><tr><td>26-50</td><td>2</td></tr><tr><td>51-75</td><td>3</td></tr><tr><td>76-100</td><td>4</td></tr><tr><td>101-150</td><td>7</td></tr><tr><td>151-200</td><td>10</td></tr><tr><td>201 and over</td><td>6 percent of total</td></tr></table>  | TOTAL NUMBER OF PARKING SPACES | NUMBER OF REQUIRED EV SPACES | 0-9          | 0 | 10-25 | 1 | 26-50 | 2 | 51-75 | 3 | 76-100 | 4 | 101-150 | 7 | 151-200 | 10 | 201 and over | 6 percent of total |  |  |  |
| TOTAL NUMBER OF PARKING SPACES | NUMBER OF REQUIRED EV SPACES |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 0-9                            | 0                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 10-25                          | 1                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 26-50                          | 2                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 51-75                          | 3                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 76-100                         | 4                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 101-150                        | 7                            |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 151-200                        | 10                           |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
| 201 and over                   | 6 percent of total           |              |   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|                                |                              |              | <b>4.106.4.3.2 Electric vehicle charging space (EV space) dimensions.</b> The EV spaces shall be designed to comply with the following:<br>1. The minimum length of each EV space shall be 18 feet (5486 mm).<br>2. The minimum width of each EV space shall be 9 feet (2743 mm).<br><b>4.106.4.3.3 Single EV space required.</b> When a single EV space is required, the EV space shall be designed in accordance with Section 4.106.4.2.3.<br><b>4.106.4.3.4 Multiple EV spaces required.</b> When multiple EV spaces are required, the EV spaces shall be designed in accordance with Section 4.106.4.2.4.<br><b>4.106.4.3.5 Identification.</b> The service panels or sub-panels shall be identified in accordance with Section 4.106.4.2.5.<br><b>4.106.4.3.6 Accessible EV spaces.</b> In addition to the requirements in Section 4.106.4.3, EV spaces for handicapped and all EVSE, when installed, shall comply with the accessibility provisions for the EV charging stations in the California Building Code, Chapter 11B.  |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|                                |                              |              | <b>DIVISION 4.2 ENERGY EFFICIENCY</b>   |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|                                |                              |              | <b>4.201 GENERAL</b>  |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |
|                                |                              |              | <b>4.201.1 SCOPE.</b> For the purposes of mandatory energy efficiency standards in this code, the California Energy Commission will continue to adopt mandatory standards.  |                                |                              |              |   |       |   |       |   |       |   |        |   |         |   |         |    |              |                    |  |  |  |

| Y   | NA   | SECTION PART | <b>DIVISION 4.3 WATER EFFICIENCY AND CONSERVATION</b>   | Y            | NA        | SECTION PART               |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
|---|--|--------------|---|--------------|-----------|----------------------------|------------------|--------------------------------|--|---|------------------|-----------------|------------------|------------------|------------------|--------------|-----------------|---------|------------------|--|--|--|
|   |  |              | <b>4.303 INDOOR WATER USE</b>   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
|   |  |              | <b>4.303.1 WATER-CONSERVING PLUMBING FIXTURES AND FITTINGS.</b> Plumbing fixtures (water closets and urinals) and fittings (faucets and showerheads) shall comply with the sections 4.303.1.1, 4.303.1.2, 4.303.1.3, and 4.303.1.4.<br><b>Notes:</b> All noncompliant plumbing fixtures in any residential real property shall be replaced with water-conserving plumbing fixtures. Plumbing fixture replacement is required prior to issuance of a certificate of final completion, certificate of occupancy, or final permit approval by the local building department. See Civil Code Section 1191.1, et seq., for the definition of a noncompliant plumbing fixture. Types of residential buildings affected and other important enactment dates.<br><b>4.303.1.1 Water Closets.</b> The effective flush volume of water closets shall not exceed 1.28 gallons per flush. Tank-type water closets shall be certified to the performance criteria of the U.S. EPA WaterSense Specification for Tank-type Toilets.<br><b>Note:</b> The effective flush volume of dual flush toilets is defined as the composite, average flush volume of two reduced flushes and one full flush.<br><b>4.303.1.2 Urinals.</b> The effective flush volume of wall-mounted urinals shall not exceed 0.125 gallons per flush. The effective flush volume of all other urinals shall not exceed 0.5 gallons per flush.<br><b>4.303.1.3 Showerheads.</b><br><b>4.303.1.3.1 Single Showerhead.</b> Showerheads shall have a maximum flow rate of not more than 1.8 gallons per minute at 80 psi. Showerheads shall be certified to the performance criteria of the U.S. EPA WaterSense Specification for Showerheads.<br><b>4.303.1.3.2 Multiple showerheads serving one shower.</b> When a shower is served by more than one showerhead, the combined flow rate of all the showerheads and/or other shower outlets controlled by a single valve shall not exceed 1.8 gallons per minute at 80 psi, or the shower shall be designed to only allow one shower outlet to be in operation at a time.<br><b>Note:</b> A hand-held shower shall be considered a showerhead.<br><b>4.303.1.4 Faucets.</b><br><b>4.303.1.4.1 Residential Lavatory Faucets.</b> The maximum flow rate of residential lavatory faucets shall not exceed 1.2 gallons per minute at 60 psi. The maximum flow rate of residential lavatory faucets shall not be less than 0.8 gallons per minute at 20 psi.<br><b>4.303.1.4.2 Lavatory Faucets in Common and Public Use Areas.</b> The maximum flow rate of lavatory faucets installed in common and public use areas (outside of dwellings or sleeping units) in residential buildings shall not exceed 0.5 gallons per minute at 60 psi.<br><b>4.303.1.4.3 Metering Faucets.</b> Metering faucets when installed in residential buildings shall not deliver more than 0.5 gallons per minute per cycle.<br><b>4.303.1.4.4 Kitchen Faucets.</b> The maximum flow rate of kitchen faucets shall not exceed 1.8 gallons per minute at 60 psi. Kitchen faucets may temporarily increase the flow above the maximum rate, but not exceed 2.2 gallons per minute at 60 psi, and must maintain a maximum flow rate of 1.8 gallons per minute at 60 psi.<br><b>Note:</b> Where complying faucets are unavailable, aerators or other means may be used to achieve reduction.<br><b>4.303.2 STANDARDS FOR PLUMBING FIXTURES AND FITTINGS.</b> Plumbing fixtures and fittings shall be installed in accordance with the California Plumbing Code, and shall meet the applicable standards referenced in Table 1703.1 of the California Plumbing Code.<br><b>NOTE:</b> THIS TABLE COMPLETES THE DATA IN SECTION 3.303.1, AND IS INCLUDED AS A CONVENIENCE FOR THE USER. |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
|   |  |              | <table><tr><th>FIXTURE TYPE</th><th>FLOW RATE</th></tr><tr><td>SHOWER HEADS (RESIDENTIAL)</td><td>1.8 GPM @ 80 PSI</td></tr><tr><td>LAVATORY FAUCETS (RESIDENTIAL)</td><td>MAX. 1.2 GPM @ 60 PSI<br/>MIN. 0.8 GPM @ 20 PSI</td></tr><tr><td>LAVATORY FAUCETS IN COMMON &amp; PUBLIC USE AREAS</td><td>0.5 GPM @ 60 PSI</td></tr><tr><td>KITCHEN FAUCETS</td><td>1.8 GPM @ 60 PSI</td></tr><tr><td>METERING FAUCETS</td><td>0.2 GALLON/CYCLE</td></tr><tr><td>WATER CLOSET</td><td>1.28 GALL/FLUSH</td></tr><tr><td>URINALS</td><td>0.125 GALL/FLUSH</td></tr></table>   | FIXTURE TYPE | FLOW RATE | SHOWER HEADS (RESIDENTIAL) | 1.8 GPM @ 80 PSI | LAVATORY FAUCETS (RESIDENTIAL) | MAX. 1.2 GPM @ 60 PSI<br>MIN. 0.8 GPM @ 20 PSI | LAVATORY FAUCETS IN COMMON & PUBLIC USE AREAS | 0.5 GPM @ 60 PSI | KITCHEN FAUCETS | 1.8 GPM @ 60 PSI | METERING FAUCETS | 0.2 GALLON/CYCLE | WATER CLOSET | 1.28 GALL/FLUSH | URINALS | 0.125 GALL/FLUSH |  |  |  |
| FIXTURE TYPE                                  | FLOW RATE                                      |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| SHOWER HEADS (RESIDENTIAL)                    | 1.8 GPM @ 80 PSI                               |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| LAVATORY FAUCETS (RESIDENTIAL)                | MAX. 1.2 GPM @ 60 PSI<br>MIN. 0.8 GPM @ 20 PSI |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| LAVATORY FAUCETS IN COMMON & PUBLIC USE AREAS | 0.5 GPM @ 60 PSI                               |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| KITCHEN FAUCETS                               | 1.8 GPM @ 60 PSI                               |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| METERING FAUCETS                              | 0.2 GALLON/CYCLE                               |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| WATER CLOSET                                  | 1.28 GALL/FLUSH                                |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
| URINALS                                       | 0.125 GALL/FLUSH                               |              |   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
|   |  |              | <b>4.304 OUTDOOR WATER USE</b>  |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |
|   |  |              | <b>4.304.1 OUTDOOR POTABLE WATER USE IN LANDSCAPE AREAS.</b> Residential developments shall comply with a local water efficient landscape ordinance or the California Department of Water Resources' Model Water Efficient Landscape Ordinance (MWELO), whichever is more stringent.<br><b>NOTES:</b><br>1. The Model Water Efficient Landscape Ordinance (MWELO) is located in the California Code Regulations, Title 23, Chapter 27, Division 2, MWELO and supporting documents, including water budget calculator, are available at: <a href="https://www.water.ca.gov/">https://www.water.ca.gov/</a>   |              |           |                            |                  |                                |  |   |                  |                 |                  |                  |                  |              |                 |         |                  |  |  |  |

|   |    |              |   |   |    |              |
|---|----|--------------|---|---|----|--------------|
| Y | NA | SECTION PART | <b>DIVISION 4.4 MATERIAL CONSERVATION AND RESOURCE EFFICIENCY</b>   | Y | NA | SECTION PART |
|   |    |              | <b>4.408 ENHANCED DURABILITY AND REDUCED MAINTENANCE</b>  |   |    |              |
|   |    |              | <b>4.408.1 ROOF PROOFING.</b> Annual surface repairs, repairs, electrical contacts, or other openings in unconditioned areas at exterior walls shall be protected against the passage of rodents by closing such openings with cement mortar, concrete masonry or a similar method acceptable to the enforcing agency.<br><b>4.408.2 CONSTRUCTION WASTE MANAGEMENT.</b> Recycle and/or salvage for reuse a minimum of 65 percent of the non-hazardous construction and demolition waste in accordance with either Section 4.408.2.1, 4.408.3 or 4.408.4, or meet a more stringent local construction and demolition waste management ordinance.<br><b>Exceptions:</b><br>1. Excavated soil and land-clearing debris.<br>2. Alternate waste reduction methods developed by working with local agencies if diversion or recycle facilities capable of compliance with this item do not exist or are not located reasonably close to the jobsite.<br>3. The enforcing agency may make exceptions to the requirements of this section when isolated jobsites are located in areas beyond the local boundaries of the diversion facility.<br><b>4.408.3 CONSTRUCTION WASTE MANAGEMENT PLAN.</b> Submit a construction waste management plan in accordance with Items 1 through 5. The construction waste management plan shall be updated as necessary and shall be available during construction for examination by the enforcing agency.<br>1. Identify the construction and demolition waste materials to be diverted from disposal by recycling, reuse on the project or salvage for future use or sale.<br>2. Specify if construction and demolition waste materials will be sorted on-site (source separated) or bulk mixed (single stream).<br>3. Identify diversion facilities where the construction and demolition waste material collected will be taken.<br>4. Identify construction methods employed to reduce the amount of construction and demolition waste generated.<br>5. Specify that the amount of construction and demolition waste materials diverted shall be calculated by weight or volume, but not by both.<br><b>4.408.4 WASTE MANAGEMENT COMPANY.</b> Utilize a waste management company, approved by the enforcing agency, which can provide verifiable documentation that the percentage of construction and demolition waste material diverted from the landfill complies with Section 4.408.3.<br><b>Note:</b> The owner or contractor may make the determination if the construction and demolition waste materials will be diverted by a waste management company.<br><b>4.408.5 WASTE STREAM REDUCTION ALTERNATIVE (LSR).</b> Projects that generate a total combined weight of construction and demolition waste in landfills, which do not exceed 3.4 lbs./sq.ft. of the building area shall meet the minimum 65% construction waste reduction requirement in Section 4.408.3.<br><b>4.408.6 WASTE STREAM REDUCTION ALTERNATIVE.</b> Projects that generate a total combined weight of construction and demolition waste disposed of in landfills, which do not exceed 2 pounds per square foot of the building area, shall meet the minimum 65% construction waste reduction requirement in Section 4.408.3.<br><b>4.408.7 DOCUMENTATION.</b> Documentation shall be provided to the enforcing agency which demonstrates compliance with Sections 4.408.2, Items 1 through 5, and Section 4.408.3 for Section 4.408.4.<br><b>Notes:</b><br>1. Sample forms found in "A Guide to the California Green Building Standards Code (Residential)" located at <a href="http://www.hcd.ca.gov/CALGreen.html">www.hcd.ca.gov/CALGreen.html</a> may be used to assist in documenting compliance with the requirements of this section.<br>2. Mixed construction and demolition debris (C&D) processors can be located at the California Department of Resources Recycling and Recovery (CalRecycle).<br><b>4.410 BUILDING MAINTENANCE AND OPERATION</b> |   |    |              |
|   |    |              | <b>4.410.1 OPERATION AND MAINTENANCE MANUAL.</b> At the time of final inspection, a manual, compact disc, cloud-based website or other media acceptable to the enforcing agency which includes all the following shall be placed in the building:<br>1. Directions to the owner or occupant that the manual shall remain with the building throughout the life cycle of the structure.<br>2. Operation and maintenance instructions for the following:<br>a. Equipment and appliances, including water-saving devices and systems, HVAC systems, photovoltaic systems, electric vehicle chargers, water heating systems and other major appliances and equipment.<br>b. Roof and yard drainage, including gutters and downspouts.<br>c. Space conditioning systems, including condensates and air filters.<br>d. Landscape irrigation systems.<br>e. Water reuse systems.<br>3. Information from local utility, water and waste recovery providers on methods to further reduce resource consumption, including recycle programs and locations.<br>4. Public transportation and/or carpool options available in the area.<br>5. Educational material on the positive impacts of an interior relative humidity between 30-60 percent and what methods an occupant may use to maintain the relative humidity level in that range.<br>6. Information about water-conserving landscape and irrigation design and controls which conserve water.<br>7. Instructions for maintaining gutters and downspouts and the importance of diverting water at least 5 feet away from the foundation.<br>8. Information on required routine maintenance measures, including, but not limited to, caulking, painting, grading around the building, etc.<br>9. Information about state solar energy and incentive programs available.<br>10. A copy of all special inspections verifications required by the enforcing agency or its code.<br><b>4.410.2 RECYCLING BY OCCUPANTS.</b> Where 5 or more multifamily dwelling units are constructed on a lot, the owner shall provide recycling bins for the disposal of waste materials (at a minimum) paper, corrugated cardboard, glass, plastics, organic waste, and metal, or install a certified sealed local recycling container, if more restrictive.<br><b>Exception:</b> Local jurisdictions that meet and apply for the exemption in Public Resources Code Section 51602.02 (C)(2)(A) et seq. are not required to comply with the organic waste portion of this section.   |   |    |              |
|   |    |              | <b>DIVISION 4.5 ENVIRONMENTAL QUALITY</b>   |   |    |              |
|   |    |              | <b>4.501 GENERAL</b>  |   |    |              |
|   |    |              | <b>4.501.1 SCOPE.</b> The provisions of this chapter shall outline means of reducing the quality of air contaminants that are odorous, irritating and/or harmful to the comfort and well being of a building's installers, occupants and neighbors.<br><b>SECTION 4.502 DEFINITIONS</b><br>4.502.1 DEFINITIONS<br>The following terms are defined in Chapter 2 (and are included here for reference):<br><b>AGRI-PER PRODUCTS.</b> Agrifiber products include wheatstraw, strawboard, plant substrates and door cores, not including laminates, fixtures and equipment (FF&E) not considered base building elements.<br><b>COMPOSITE WOOD PRODUCTS.</b> Composite wood products include hardwood plywood, particleboard and medium density fiberboard. "Composite wood products" does not include hardwood, structural plywood, structural panels, structural composite lumber, oriented strand board, glued laminated timber, prefabricated wood joists or finger-joint lumber, as specified in California Code of Regulations (CCR), Title 17, Section 81201.1.<br><b>DIRECT-BURNING APPLIANCE.</b> A fuel-burning appliance with a sealed combustion system that draws all air for combustion from the outside atmosphere and discharges all fuel gases to the outside atmosphere.   |   |    |              |

STAMP

ISSUE DATE: 10/20/2021

PERMIT SUBMITTAL

LOGO

chx  
prefabricated  
6114 LAFAYETTE AVENUE #555 OAKLAND CA 94611  
TOM LONG, MA - 415.906.9030 - T@CHXBUILD.COM

FACTORY

SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERIS, CA 95071  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:  
EL CAMINO APARTMENTS

ADDRESS:  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:  
PRINCE STREET PARTNERS  
P.O. BOX 1077  
PALO ALTO, CA 94302

DRAWING:  
CAL GREEN SHEET 1

FILED NO: SHEET STATUS:

ISSUE DATE: 10/20/2021 CAD FILE:

PLOT DATE: 10/20/2021 REVISION:

DESIGNER, SHEET NO: A-0.14

DRAWN BY: CHMS, TL

FOR LONDON 2021

DISCLAIMER: THIS DOCUMENT IS PROVIDED AND INTENDED TO BE USED AS A MEANS TO INDICATE AREAS OF COMPLIANCE WITH THE 2019 CALIFORNIA GREEN BUILDING STANDARDS (CALGREEN) CODE. DUE TO THE VARIABLES BETWEEN BUILDING DEPARTMENT JURISDICTIONS, THIS CHECKLIST IS TO BE USED ON AN INDIVIDUAL PROJECT BASIS AND MAY BE MODIFIED BY THE USER TO MEET THOSE INDIVIDUAL NEEDS. THE END USER ASSUMES ALL RESPONSIBILITY ASSOCIATED WITH THE USE OF THIS DOCUMENT, INCLUDING VERIFICATION WITH THE FULL CODE.







## 1162 El Camino Real

LEED Homes Multi-Family Low-Rise v4 (CA T24) Scorecard

Date: 9/27/2021

Goal: SILVER

Tracking: SILVER

| 59.0 | 7   | 22.5 | 19.5 | Total Project Score | Certified 40-49 points  | Silver 50-59 points | Gold 60-79 points | Platinum 80 or more points |
|------|-----|------|------|---------------------|---|---------------------|-------------------|----------------------------|
| Yes  | TY  | YN   | No   |                     |   |                     |                   |                            |
| 1    |     | 1    |      |                     |   |                     |                   |                            |
|      |     |      |      | Credit 1            | Integrative Process   | 2                   |                   |                            |
| 14.5 |     |      | 0.5  |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Floodplain Avoidance  | -                   |                   |                            |
|      |     |      |      | Credit 1            | LEED Neighborhood Development Location                                    | 15                  |                   |                            |
| 8    |     |      |      | Credit 2            | Site Selection  | 8                   |                   |                            |
| 3    |     |      |      | Credit 3            | Compact Development   | 3                   |                   |                            |
| 2    |     |      |      | Credit 4            | Community Resources   | 2                   |                   |                            |
| 1.5  |     |      | 0.5  | Credit 5            | Access to Transit   | 2                   |                   |                            |
| 2.5  | 1   | 0.5  | 3    |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Construction Activity Pollution Prevention                                | -                   |                   |                            |
| Y    |     |      |      | Credit 2            | No Invasive Plants  | -                   |                   |                            |
| 1    | 1   |      |      | Credit 3            | Heat Island Reduction   | 2                   |                   |                            |
|      |     |      | 3    | Credit 2            | Rainwater Management  | 3                   |                   |                            |
| 1.5  |     | 0.5  |      | Credit 3            | Nontoxic Pest Control   | 2                   |                   |                            |
| 6    | 3   | 1    |      |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Water Metering  | -                   |                   |                            |
|      |     |      |      | Credit 1            | Total Water Use - Performance Path  | 12                  |                   |                            |
| 4    | 1   | 1    |      | Credit 2            | Indoor Water Use  | 6                   |                   |                            |
| 2    | 2   |      |      | Credit 3            | Outdoor Water Use   | 4                   |                   |                            |
| 20   | 2   | 9.5  | 7    |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Minimum Energy Performance  | -                   |                   |                            |
| Y    |     |      |      | Credit 2            | Energy Metering   | -                   |                   |                            |
| Y    |     |      |      | Credit 3            | Education of homeowner, tenant, or building manager                       | -                   |                   |                            |
| 17   |     | 8    |      | Credit 1            | Annual Energy Use - Performance Path                                      | 25                  |                   |                            |
| 2    |     |      | 3    | Credit 2            | Efficient Hot Water Distribution System                                   | 5                   |                   |                            |
| 1    |     |      | 1    | Credit 3            | Advanced Utility Tracking   | 2                   |                   |                            |
|      |     |      | 1    | Credit 4            | Active Solar-Ready Design   | 1                   |                   |                            |
|      |     |      | 1    | Credit 5            | HVAC Start-Up Credentialing   | 1                   |                   |                            |
|      |     | 1.5  | 0.5  | Credit 6            | Lighting  | 2                   |                   |                            |
| 1.5  |     | 0.5  |      | Credit 7            | High-Efficiency Appliances  | 2                   |                   |                            |
| 2    |     | 7    | 1    |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Certified Tropical Wood   | -                   |                   |                            |
| Y    |     |      |      | Credit 2            | Durability Management   | -                   |                   |                            |
|      |     |      | 1    | Credit 1            | Durability Management Verification  | 1                   |                   |                            |
|      |     | 4    |      | Credit 2            | Environmentally Preferable Products                                       | 4                   |                   |                            |
|      |     | 3    |      | Credit 3            | Construction Waste Management   | 3                   |                   |                            |
| 2    |     |      |      | Credit 4            | Material-Efficient Framing  | 2                   |                   |                            |
| 6.0  | 0.5 | 2.5  | 7    |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Ventilation   | -                   |                   |                            |
| Y    |     |      |      | Credit 2            | Combustion Venting  | -                   |                   |                            |
| Y    |     |      |      | Credit 3            | Garage Pollutant Protection   | -                   |                   |                            |
| Y    |     |      |      | Credit 4            | Radon-resistant Construction  | -                   |                   |                            |
| Y    |     |      |      | Credit 5            | Air Filtering   | -                   |                   |                            |
| Y    |     |      |      | Credit 6            | Environmental Tobacco Smoke   | -                   |                   |                            |
| Y    |     |      |      | Credit 7            | Compartmentalization  | -                   |                   |                            |
| 1    |     | 2    |      | Credit 1            | Enhanced Ventilation  | 3                   |                   |                            |
|      |     | 2    |      | Credit 2            | Contaminant Control   | 2                   |                   |                            |
| 1    |     | 2    |      | Credit 3            | Balancing of Heating & Cooling System                                     | 3                   |                   |                            |
|      |     | 1    |      | Credit 4            | Enhanced Compartmentalization   | 1                   |                   |                            |
| 2    |     |      |      | Credit 5            | Enhanced Combustion Venting   | 2                   |                   |                            |
|      |     | 2    |      | Credit 6            | Enhanced Garage Pollutant Protection                                      | 2                   |                   |                            |
| 2    | 0.5 | 0.5  |      | Credit 7            | Low Emitting Products   | 3                   |                   |                            |
| 4    |     | 1    | 1    |                     |   |                     |                   |                            |
| Y    |     |      |      | Credit 1            | Preliminary Rating  | -                   |                   |                            |
| 1    |     |      |      | Credit 1.1          | Exemplary Performance: LTc3 Compact Development                           | 1                   |                   |                            |
| 1    |     |      |      | Credit 1.2          | Exemplary Performance: LTc2 Site Selection                                | 1                   |                   |                            |
| 1    |     |      |      | Credit 1.3          | Innovation: EV Charging (BD+C v4.1 Electric Vehicles)                     | 1                   |                   |                            |
| 1    |     |      |      | Credit 1.4          | Innovation: Low Mercury Lighting (LED) or Housing Types & Affordability   | 1                   |                   |                            |
|      |     | 1    |      | Credit 1.5          | Pilot Credit: TBD   | 1                   |                   |                            |
|      |     | 1    |      | Credit 2            | LEED™ Accredited Professional   | 1                   |                   |                            |
| 3    |     | 1    |      |                     |   |                     |                   |                            |
| 1    |     |      |      | Credit 1.1          | Regional Credit: LTc4 Community Resources (2 pts)                         | 1                   |                   |                            |
|      |     | 1    |      | Credit 1.2          | Regional Credit: SSc2 Rainwater Management (2 pts)                        | 1                   |                   |                            |
|      |     | 1    |      | Credit 1.3          | Regional Credit: WEc3 Outdoor Water Use (4 pts) or Total Water Use (8 pt) | 1                   |                   |                            |
|      |     | 1    |      | Credit 1.4          | Regional Credit: EAcl Annual Energy Use (18 pts)                          | 1                   |                   |                            |
| 1    |     |      |      | Credit 1.5          | Regional Credit: EAcl Advanced Utility Tracking (1 pt)                    | 1                   |                   |                            |
| 1    |     |      |      | Credit 1.6          | Regional Credit: MRc4 Material-Efficient Framing (2 pts)                  | 1                   |                   |                            |



### MEMORANDUM

DATE 10/12/2021  
TO City of Menlo Park, Building Department  
FROM Brightworks Sustainability  
RE **1162 El Camino Real – Residential Building**  
Green Building Ordinance Compliance Letter – Permit Phase

To whom it may concern:

This letter is to verify that, as currently submitted, the 1162 El Camino Real residential building project consisting of the construction of a new three-story multifamily residential building at 1162 El Camino Real in Menlo Park, CA, is expected to comply with all applicable Title 24 Part 11 (CALGreen 2019) Mandatory Measures. Additionally, to maintain compliance with City of Menlo Park Green Building Ordinance requirement of LEED Silver as verified by a LEED AP, the project team has included a LEED-Homes Multifamily Low-Rise v4 Scorecard targeting Silver certification.

Based on the current Permit package, the project is currently in compliance with 59 LEED credits/points assured on the LEED Scorecard under the "YES" column. As the project moves forward, we anticipate that some additional credits/points will be added to the final LEED score through design team confirmation, owner decisions, and achievement of construction-phase sustainability strategies. The team is fully committed to achieving LEED certification at the Silver level and will ensure the minimum number of "YES" points at construction completion does not fall below 50.

Final verification of construction requirements for occupancy will be undertaken by Brightworks, and an appropriate Verification Letter will be provided.

Kind regards,

Cassidy Green

Cassidy Green | Project Manager  
LEED AP (BD+C / O+M), CPHC  
BRIGHTWORKS SUSTAINABILITY  
(310) 452-5634  
Cassidy.green@brightworks.net

LEED Online

Page 1 of 3

### LEED ONLINE

Cassidy Green

1162 El Camino

1162 El Camino

Summary Details Payments

Project details

NAME

1162 El Camino

ASSIGNMENT NAME

20 Sep 2021

ACTUAL SYSTEM

LEED v4 BD+C: Homes and Multifamily Lowrise

BUILDING TYPE

Multifamily Low-Rise (1-5 stories)

CERTIFICATION LEVEL

United States

ADDRESS 1

1162 El Camino Road

CITY

Menlo Park

STATE/PROVINCE

California

POSTAL CODE

94025

GPS LOCATION

37.467168, -122.183333

HOUSES PROVIDED

0/1000/200

OWNER FACTOR

Multiple Detached

UNITS PROVIDED

1000 sq ft

CONSTRUCTION DATE

2021 Aug 9

NUMBER OF UNITS

5

NUMBER OF STORIES

3

BUILDING CLASSIFICATION

Market Rate

BUILDING NAME

Camino Building, Inc.

PERMITS

No

NATURAL RESOURCES

No

OWNER

Prince Street Partners

OWNER'S REPRESENTATIVE (NAME AND POSITION OR EMAIL)

Chris Page

OWNER TYPE

Profit Organization

OWNER CONTACT INFORMATION

Chris Page

PHONE

<https://www.leedonline.com/homes/details/1000149557>

10/12/2021

STAMP



ISSUE DATE:

PERMIT SUBMITTAL 102002021

LOGO



FACTORY



SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:  
EL CAMINO APARTMENTS

ADDRESS:  
1162 EL CAMINO  
MENLO PARK, CA 94025  
APN: 061 441 100

CLIENT:  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:  
LEED SCORECARD

PROJ. NO. SHEET STATUS:  
DWG. DATE: 4/20/2018 CAD FILE:  
PLOT DATE: 20/09/2018 REVISION:  
ORIGINAL SHEET NO.:  
REVISED

A-0.16

DRAWN BY: CHWJ TL

TORONTO DESIGN 2021

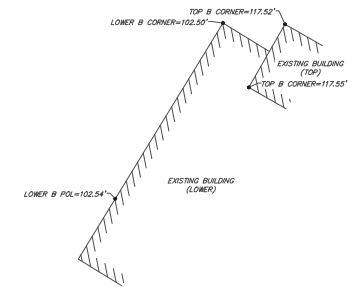


# TOPOGRAPHIC & BOUNDARY SURVEY

1162 EL CAMINO REAL  
MENLO PARK, CA 94025  
APN 061-441-100



VICINITY MAP  
N.T.S.



## 1162 EL CAMINO REAL

TOTAL AREA OF SUBJECT PROPERTY:  
0.274 ACRES  
±0.19 ACRES

### OWNER

1162 EL CAMINO INVESTORS LLC  
P.O. BOX 1872  
PALO ALTO, CA 94302

### BENCHMARK

FOUND BRASS DISK IN BUILDING FOUNDATION,  
NORTHWEST CORNER OF EL CAMINO REAL AND  
SANTA CRUZ AVE. "N.G.S. BENCHMARK 10110"  
ELEVATION=73.85'  
(NAVD 88 DATUM)

### UTILITY NOTE

IF UNDERGROUND UTILITIES, ZONE, SETBACK AND STREET WIDENING DATA ARE  
SHOWN HEREON, IT IS FOR INFORMATION ONLY, HAVING BEEN OBTAINED FROM  
AVAILABLE SOURCES NOT CONNECTED WITH THIS CORPORATION. THEREFORE,  
NO GUARANTEE IS MADE AS TO THE ACCURACY OR COMPLETENESS OF SAID  
INFORMATION.

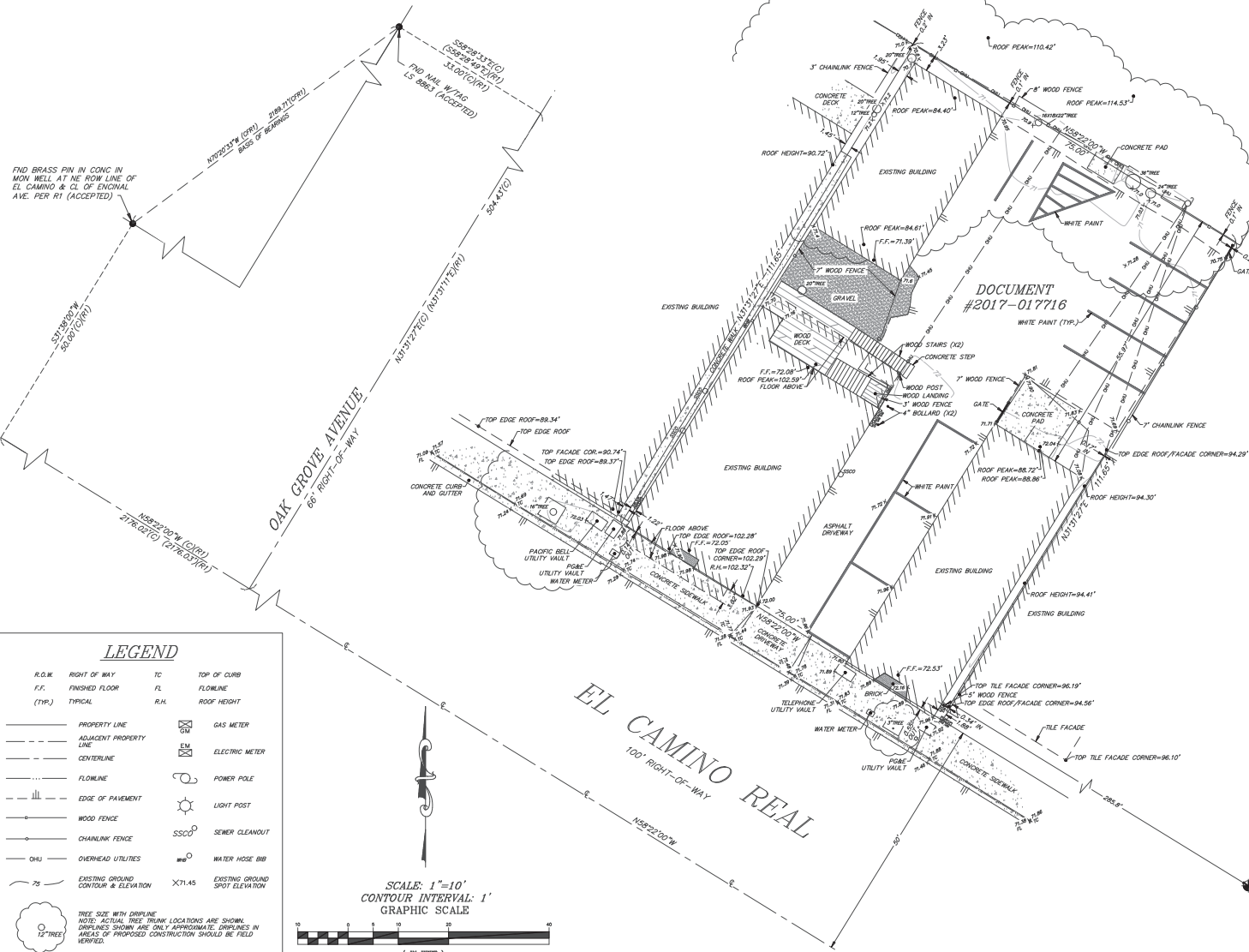
### RECORD INFORMATION

(RT) = RECORD INFORMATION PER VOL. 141 RSM PAGE 70

I CERTIFY THAT THIS PARCEL'S BOUNDARY WAS ESTABLISHED BY ME OR  
UNDER MY SUPERVISION AND IS BASED ON A FIELD SURVEY IN CONFORMANCE  
WITH THE LAND SURVEYORS ACT. ALL INFORMATION OF THE CHARACTER  
AND OCCUPY THE POSITIONS INDICATED AND ARE SUFFICIENT TO ENABLE THE  
SURVEY TO BE RETRACED.



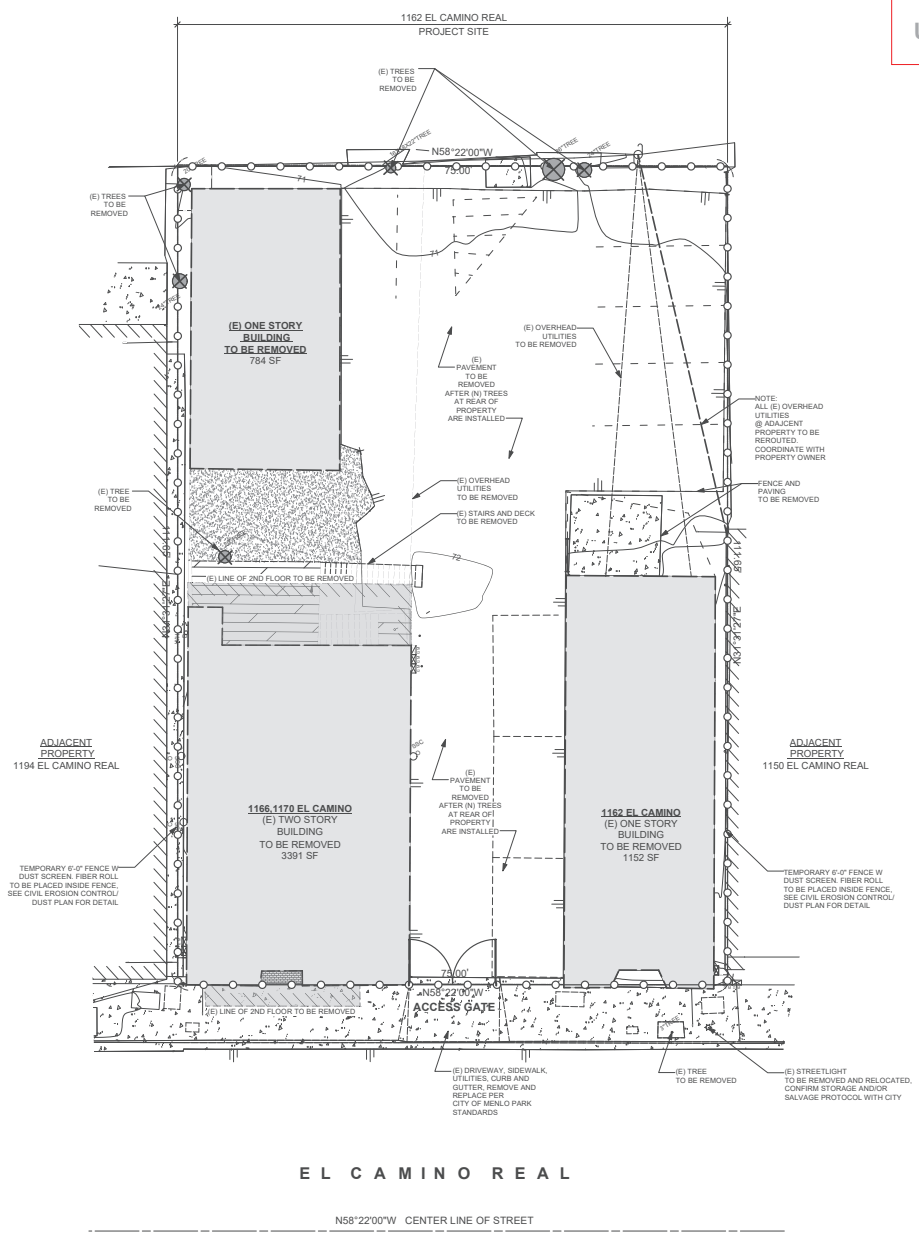
DATE: 1/23/20  
SCALE: 1"=10'  
DRAWN: TJP  
JOB NO: 09.2054  
SHEET 1 OF 1



2.10P 1162-1162-1162 1162 El Camino Real Menlo Park 1/23/20 09.2054 Topo-Boundary Aug 01/2020 = 12.30pm, approved



FOR REFERENCE ONLY  
DEMOLITION  
UNDER SEPARATE PERMIT



- SCOPE OF DEMOLITION
1. ALL BUILDINGS, STRUCTURES, AND HARDSCAPE, TO BE REMOVED
  2. DISCONNECT AND CAP ALL UTILITIES
  3. SEE NOTES FOR TREES TO REMOVE

STAMP

ISSUE DATE:

PERMIT SUBMITTAL 10/20/2021

LOGO

ch x tld  
prefab evolved

6114 LASALLE AVENUE #552 OAKLAND CA 94611  
TORY LONG, AIA - 415.955.5530 - TOL@CHXTLD.COM

FACTORY

SILVER CREEK

SILVER CREEK INDUSTRIES, INC.  
2830 BARRETT AVENUE  
PERRIS, CA 92571  
PHONE: 951.943.5393  
FAX: 951.943.2211

STATE APPROVAL STAMP:

PROJECT:  
EL CAMINO APARTMENTS

ADDRESS:  
1162 EL CAMINO REAL  
MENLO PARK, CA 94025  
APN 061 441 100

CLIENT:  
PRINCE STREET PARTNERS  
P.O. BOX 1072  
PALO ALTO, CA 94302

DRAWING:  
DEMOLITION PLAN

THESE PLANS ARE CONSIDERED PRELIMINARY AND NOT FOR CONSTRUCTION. ANY CHANGES TO THE PLANS MUST BE APPROVED BY THE ARCHITECT. THE ARCHITECT IS NOT RESPONSIBLE FOR THE ACCURACY OF THE INFORMATION PROVIDED HEREON. THE ARCHITECT IS NOT RESPONSIBLE FOR THE ACCURACY OF THE INFORMATION PROVIDED HEREON. THE ARCHITECT IS NOT RESPONSIBLE FOR THE ACCURACY OF THE INFORMATION PROVIDED HEREON.

PREP. NO. SHEET STATUS:

DWG. DATE: 10/20/2021 CAD FILE:

PLOT DATE: 10/20/2021 REVISION:

ORIGINAL SHEET SIZE: A-1.0

DRAWING: DWG. FILE:

SCALE: 1/8" = 1'-0"

TORY LONG DESIGN 2021



# 2022-23 NOTICE OF FUNDING AVAILABILITY APPLICATION

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702

| Project applicant   |  |   |  |
|---|--|---|--|
| Organization/Agency: <a href="#">MidPen Housing Corporation</a>   |  |   |  |
| Primary contact person: <a href="#">Cynthia Luzod</a>   |  |   |  |
| Phone: <a href="#">650-753-3230</a>   |  | Email: <a href="mailto:Cynthia.luzod@midpen-housing.org">Cynthia.luzod@midpen-housing.org</a> |  |
| Address: <a href="#">303 Vintage Park Drive, Suite 250</a>  |  | City: <a href="#">Foster City</a>   | State: <a href="#">CA</a> Zip: <a href="#">94404</a> |
| <p>1. What is the role of the applicant in the project (check all that apply):</p> <p><input type="checkbox"/> Ownership entity</p> <p><input type="checkbox"/> Managing partner or managing member</p> <p><input type="checkbox"/> Sponsoring organization</p> <p><input checked="" type="checkbox"/> Developer</p> <p><input type="checkbox"/> Other (describe):</p> <p>2. Applicant legal status:</p> <p><input type="checkbox"/> General partnership</p> <p><input type="checkbox"/> Joint venture</p> <p><input type="checkbox"/> Limited partnership corporation</p> <p><input checked="" type="checkbox"/> Nonprofit Organization</p> <p><input type="checkbox"/> Other (please specify):</p> <p>3. Organization status:</p> <p><input checked="" type="checkbox"/> Currently Exists</p> <p><input type="checkbox"/> To be formed (estimated date):</p> <p>4. Name(s) of individuals who are/will be general partner(s) or principal owner(s):</p> <p><a href="#">The proposed project Owner is a to-be-formed Limited Partnership with an affiliate of MidPen Housing Corporation serving as the general partner.</a></p> <p>If the applicant is a joint venture, a joint venture agreement is required that clearly describes the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.</p> |  |   |  |
| Project detail  |  |   |  |
| Project name: <a href="#">Veterans Affairs Permanent Supportive Housing</a>   |  |   |  |
| Project address: <a href="#">795 Willow Road</a>  |  | City: <a href="#">Menlo Park</a>  | State: <a href="#">CA</a> Zip: <a href="#">94025</a> |
| Assessor's parcel number: <a href="#">062470060</a>   |  |   |  |
| <p>Project type (check all that apply):</p> <p><input type="checkbox"/> Families</p> <p><input type="checkbox"/> Seniors</p> <p><input checked="" type="checkbox"/> Special needs</p> <p><input checked="" type="checkbox"/> Other (please describe): <a href="#">Veterans and their families who are at risk of homelessness or formerly homeless</a></p>  |  |   |  |
| <p>Project activity (check all that apply):</p> <p><input type="checkbox"/> Acquisition</p> <p><input type="checkbox"/> Rehabilitation</p> <p><input checked="" type="checkbox"/> New construction</p> <p><input type="checkbox"/> Preservation</p> <p><input type="checkbox"/> Mixed-income</p> <p><input type="checkbox"/> Mixed-use</p> <p><input type="checkbox"/> Other (please specify):</p>  |  |   |  |
| Land area: <a href="#">2.14</a>   |  | Number of residential buildings: <a href="#">1</a>  |  |



| Number of units: 62  | Residential total floor area: 32,032 square feet    |      |      |      |      |                     |       |       |       |      |
|--|---|------|------|------|------|---------------------|-------|-------|-------|------|
| Number of stories: 3   | Number of elevators: 2                              |      |      |      |      |                     |       |       |       |      |
| Number of community rooms: 1   | Community room(s) total floor area: 895 Square Feet |      |      |      |      |                     |       |       |       |      |
| Commercial/office uses (please specify): N/A   |   |      |      |      |      |                     |       |       |       |      |
| Commercial total floor area: N/A   | Office total floor area: N/A                        |      |      |      |      |                     |       |       |       |      |
| Other uses (please specify):   |   |      |      |      |      |                     |       |       |       |      |
| Total parking spaces: 55   | Parking type(s): Surface                            |      |      |      |      |                     |       |       |       |      |
| Residential parking spaces: 55   | Residential parking ratio: 1:0.89                   |      |      |      |      |                     |       |       |       |      |
| Guest parking spaces: 0  |   |      |      |      |      |                     |       |       |       |      |
| Commercial parking spaces: 0   | Commercial parking ratio: N/A                       |      |      |      |      |                     |       |       |       |      |
| Office parking spaces: 0   | Office parking ratio: N/A                           |      |      |      |      |                     |       |       |       |      |
| <b>Income categories</b>   |   |      |      |      |      |                     |       |       |       |      |
| City BMR funds may only fund units serving extremely low, very low or low income households at or below 80% of the area median income (AMI). Inclusions of units for homeless households are encouraged. |   |      |      |      |      |                     |       |       |       |      |
| Category   | Number of units                                     |      |      |      |      | Percentage of units |       |       |       |      |
|  | Studio  | 1 bd | 2 bd | 3 bd | 4 bd | Studio              | 1 bd  | 2 bd  | 3 bd  | 4 bd |
| 0 to 30% AMI – Extremely low   |   | 18   | 1    | 1    |      |                     | 29%   | 1.5%  | 1.5%  |      |
| 31 to 50% AMI – Very low   |   | 36   | 3    | 1    |      |                     | 58.5% | 5%    | 1.5%  |      |
| 51 to 80% AMI – Low  |   |      |      |      |      |                     |       |       |       |      |
| 81 to 120% AMI – Moderate  |   |      |      |      |      |                     |       |       |       |      |
| Unrestricted   |   | 1    | 1    |      |      |                     | 1.5%  | 1.5%  |       |      |
| TOTAL  |   | 55   | 5    | 2    |      |                     | 89%   | 8%    | 3%    |      |
|  |   |      |      |      |      |                     |       |       |       |      |
| What is your existing total BMR obligation by unit type?   |   |      |      |      |      |                     |       |       |       |      |
| Category   | Number of units                                     |      |      |      |      | Percentage of units |       |       |       |      |
|  | Studio  | 1 bd | 2 bd | 3 bd | 4 bd | Studio              | 1 bd  | 2 bd  | 3 bd  | 4 bd |
| BMR Obligation   |   | 54   | 4    | 2    |      |                     | 90%   | 6.67% | 3.33% |      |



### Unit amenities

Provide a brief list of unit amenities (e.g., air conditioning, laundry in unit, balconies, etc.):

All units are proposed to be either one-, two-, or three-bedroom units. Each unit will include full kitchens, bedroom closets, fully vented bathrooms, and individual heating system. Kitchens will be fully equipped with a refrigerator, range, sink with garbage disposal, and storage cabinets. The two- and three-bedroom units' kitchens will also be equipped with dishwashers. The finishes and appliances MidPen use in its developments are selected for their durability, livability and energy efficiency, based on our years of Property Management experience at our 100+ properties.

### Project narrative (please attach any additional responses)

1. Project description: Provide a brief narrative summary of the proposed project including location, project type (e.g., new versus rehab), target population and any unique project characteristics.

The proposed Permanent Supportive Housing is located at 795 Willow Road in Menlo Park, CA, directly on the VA Palo Alto Health Care System Campus, Menlo Park Division. The proposed affordable housing project is on federal land that is owned by the US Department of Veterans Affairs (the "VA") and is therefore under federal jurisdiction. The proposed new construction development will be a 100% permanent supportive housing community with 62 homes (including 2 manager's units), targeting Veterans and their families who are formerly homeless or at-risk of homelessness with income limits ranging from 30% to 50% of Area Median Income (AMI). The proposed unit mix consists of 55 one-bedrooms (including 1 manager's unit), 5 two-bedrooms (including 1 manager's unit), 2 three-bedrooms.

Although the proposed project is located on federal land that is owned by the VA, MidPen staff have been in close contact with the City about the proposed plan since being selected to develop the site by the VA in 2019. This site has also been identified in Menlo Park's 2023-2031 Housing Element, and we are using the City's High Density Residential zoning design requirements (R-4-S) as a guideline for this project.

2. Project design: Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.

- 62 units
- 3-story building with a 2-story step down
- Type V Wood Construction
- 55 Surface Parking Spaces
- Residential Bicycle Parking
- Indoor and Outdoor Common space for Residents

Given the proposed project's unique location on the VA Palo Alto Healthcare campus and along Willow Road, the proposed development is designed to fit the style and context of the VA Campus, while also fitting into the neighborhood fabric of Willow Road. The Architectural style of this project is what we are calling "Menlo Mediterranean", which is a compilation of traditional warm adobe colors, represented throughout the VA campus, with simple contemporary volumes. This 3-story building incorporates 2-story step downs that provide stylistic variation and a seamless transition to the surrounding residential neighborhood further down Willow Road.

Given the site's proximity to Willow Road with frequent traffic coming and going in both directions, a strong emphasis has been given to development's outdoor residential landscaping. The design intent of the site landscaping is to provide healing spaces for veteran households by creating a visual and auditory buffer between the proposed building and Willow Road. The site landscaping incorporates a community garden, walking paths for residents, a dog run, and flexible open space. The site hosts several mature oak and redwood trees, and many trees are retained to provide a garden like landscape for the residents. Residents of this community and of Menlo Park alike will benefit from this landscaped area.

As a supportive housing project, under the California State Density Bonus Law (AB 1763), the project legally qualifies to receive an 80% density bonus and is entitled to a zero-parking requirement. The proposed project will include 55 residential parking spaces, providing a 1:0.89 parking ratio. This parking ratio is similar to other MidPen properties serving a similar population and is based on our understanding of



expected resident car ownership and needs.

**3. Green building features:** Describe the green building features that will be incorporated into the project.

The project will use 100% electric energy. Green building design and materials will be incorporated into the project. The project will be LEED Platinum rated. Energy-efficient and water saving systems, fixtures, and appliances will be included in the buildings and in individual residential units. This project will also benefit from rooftop solar PV, which will help offset common space energy usage. MidPen will make design and product decisions – such as low-VOC paints and drought-resistant plantings – to provide healthy, durable homes and to promote the long-term sustainability and operational success of the property.

**4. On-site amenities:** Describe any on-site amenities including any project characteristics that address the special needs of the population you intend to serve.

Future residents will benefit from various indoor and outdoor on-site amenities. Indoor amenities include a multi-purpose community room and kitchen, a computer station, multiple laundry rooms, secure residential bicycle storage that will provide at least one bicycle parking space for every unit, and offices for MidPen's property management and resident services teams, as well as the VA's case managers.

Outdoor amenities will include surface parking for residents, a community garden, social and meditative gathering spaces, and other open areas for residents to enjoy.

**5. Neighborhood off-site amenities:** Describe the property location, neighborhood transportation options, and local services and amenities that are within 1/4 mile and 1/2 mile of the site.

The Veterans Affairs Permanent Supportive Housing project is an excellent location for Veteran households that are formerly homeless or at-risk of homelessness due to its proximity to amenities near the VA Palo Alto Health Care System, Menlo Park Division. Situated on the corner of Willow Road and Hospital Plaza, the proposed project is close to several amenities.

The local amenities within a 1/4 mile radius include:

- Transit: SamTrans VA Medical Center – Bus Stop is located less than 0.25 miles away and is serviced by routes 296, 2960, and 397. Route 296 has service every 20-30 minutes allowing future residents future access to consistent and reliable transportation
- Groceries: Residents will have access to El Rancho Market (within 0.25 mile).
- Health and Social Services/Schools: the project site is located directly on VA Menlo Park Health Care Systems Campus and is therefore within 0.25 miles from a health care and social services facility (includes a hospital, clinic, and support services).
- Public Park: The proposed project is located within 0.25 mile of Willow Oaks Park

The local amenities within a 1/2-mile radius include:

- Public Park: The proposed project is located within 0.5 mile of Seminary Oaks Park.



6. Potential development obstacles: Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below including an outline of steps that will be taken and the time needed to resolve these issues.

To assemble the financing required to build the Veterans Affairs Permanent Supportive Housing project, MidPen must leverage City NOFA funds to obtain additional funding from outside sources such as additional County Affordable Housing Fund funds, State financing, and 9% Low Income Housing Tax Credits. See the Project Funding section of this NOFA for further detail on the steps MidPen will take to close the project financing gap. We are confident that the necessary funds to construct 62 new, affordable homes can be assembled from various sources that are explicitly intended to be used for the development of extremely low- and very low-income Veteran households. We estimate that assembling this gap financing will only require 2-3 additional applications and take about 1.5 years.

**Site information (please attach any additional responses)**

Site control is required. Evidence should also be submitted demonstrating that the entity that has site control is the same entity applying for funds. Please include the site control document with the application.

What type of site control does the applicant currently hold?

The US Department of Veterans Affairs (the 'VA') currently owns the project site. The proposed project Owner is a to-be-formed limited partnership with an affiliate of MidPen serving as the general partner. The to-be-formed limited partnership will have a leasehold interest in the land and fee interest in the improvements. This leasehold interest will be established through an Enhanced Use Lease Agreement with the VA.

The VA provided a letter to MidPen, evidencing its commitment to enter into a 99-Year Enhanced Use Lease Agreement with MidPen Housing (or its affiliated Limited Partnership). This agreement will be signed after the project receives a tax credit award and before the project closes on construction.

Will site acquisition be a purchase or long-term lease?

The site acquisition will be a long-term lease with the US Department of Veterans Affairs.

What is the purchase price of the land? For proposed leaseholds, indicate the amount of the annual lease payment and the basis for determining that amount:

The annual lease payment to the VA will be a nominal amount of \$1.00.

What is the current County-assessed value of the site?

The VA, current owner of the project site, obtained an appraisal of the project site for \$7,320,000.

Who is the current property owner and what is their address and contact information?

The current property owner of the proposed site is the U.S. Department of Veterans Affairs (the "VA"). The address and contact information for the VA is included below.

Address

795 Willow Road  
Menlo Park, CA 94025

Contact Information

De Carol Smith  
(202) 697-2257  
[Decarol.smith@va.gov](mailto:Decarol.smith@va.gov)

Total square footage of site: 93,104 square feet (2.14 acres)



Existing uses on the site and the approximate square footage of all structures:

The northern portion of the project site is currently being used as an overflow parking lot for employees who work at the VA Palo Alto Health Care System, Menlo Park. The southern portion of the site is currently an unused grass area. The square footage of the overflow parking lot and unused grass is 93,104 square feet (2.14 acres).

Planned use of on-site existing structures:

☐ Demolish

☐ Rehabilitate

☒ Other (describe): There are no existing site structures to demolish. The existing surface parking lot will be redesigned to complement the proposed multifamily building.

Provide the square footage, date built and number of stories for each on-site building to be retained as part of this project:

N/A

Provide a brief description of the condition of any buildings to be rehabilitated:

There are no existing buildings on the site.



Describe unique site features (heritage trees, parcel shape, etc.)

MidPen's Arborist conducted a tree survey of the site, in which we plan to preserve 66 of the 90 existing heritage trees on this site. In addition to preserving trees, we will also be planting 54 new trees.

The proposed project site does not currently have the utility connections needed to serve the future housing community and will rely on a combination of existing VA facilities and connections and City utilities on Willow Road.

Identify problem site conditions (high noise levels, ingress/egress issues, etc.)

There are no problem site conditions.

### Floodplain

Is the site in a floodplain? ☐ Yes ☒ No

If yes, type of flood plain and number of years: *N/A*

List any maps referenced: [msc.fema.gov](https://msc.fema.gov). Flood Map 06081C0308E effective 10/16/2012

### Describe adjoining land uses

West: Public Facilities – VA Palo Alto Healthcare System Campus

East: Commercial and Single-Family Housing

North: Public Facilities – VA Palo Alto Healthcare System Campus

South: Single Family Housing, Multifamily Residential

### Zoning

What is the current zoning of the project site? *Public Facilities*

Is the proposed project consistent with the existing zoning of the site? ☒ Yes ☐ No

Explain:

The project site is zoned Public Facilities (P-F), but because it is located on federally-owned land, there is federal sovereignty over the site, meaning that the project is not obligated to comply with local zoning regulations, and it will not need to be rezoned for multifamily residential use. MidPen has been in communication with the City's Housing and Planning staff since January 2020 and has conveyed this unique project component to City staff.

Though technically this project can move forward without being rezoned, MidPen is using the City's High Density Residential (R-4-S) zoning requirements as a guideline for the project design. This project site was also identified in the City of Menlo Park's 2023-2031 Draft Housing Element as a Housing Opportunity site. MidPen submitted a formal request for Planning review in September 2022 and received initial comments, which are currently being incorporated, in early 2023. Once the Housing Element is adopted and the City's Planning review is complete, it is expected that the City's Community Development Director will sign a Letter of Conformance, stating that the project conforms to the City's R-4-S zoning. This letter will then serve as the project's formal proof of entitlement from the City.



Indicate any discretionary review permits required for the project (e.g., planned community permits, design review permits, rezoning, etc.)

Given that the project site is located on federal land that is and will continue to be owned by the Veteran's Administration, the VA has legal sovereign entitlement authority over the project and the project itself can move forward without any discretionary design review, rezoning, or entitlement approval by the City of Menlo Park. As such, the VA can proceed with this project by right.

Despite this authority, MidPen recognizes the important interface the proposed project will have with Willow Road and the Menlo Park community. As described above, MidPen submitted a schematic design package in September 2022 to provide an opportunity for the City to comment on the project design.



If rezoning is required identify the requested zoning district for the project: [N/A](#)

### **Community priorities (please attach any additional responses)**

Explain how this project meets the objectives of the project priorities identified in this NOFA and the goals and objectives of the City's Housing Element and General Plan:

The proposed Veterans Affairs Permanent Supportive Housing project (the "Project") will meet the objectives and project priorities outlined in the City's NOFA and the goals and objectives of the City's Housing Element and General Plan.

#### **Housing Element:**

One of the overarching goals of the City of Menlo Park's Housing Element is to encourage the construction of new affordable housing to expand the City's stock of affordable housing, specifically supportive housing for special needs populations. The Housing Element identifies this project as a specific Program (H3.F) that will help the City meet its Housing Element goals. The proposed project specifically meets Goals #3 and #4 of the Housing Element, as it will provide permanent affordable rental housing for Veteran households, a special needs population, earning extremely low- and very-low incomes. Future Veteran households will be offered support services by MidPen Resident Services, and HUD-VASH voucher holders will also be supported by Veterans Affairs Case Managers. Additionally, MidPen is working directly with the U.S. Department of Veterans Affairs to provide the land and services, directly furthering the City's Housing Element Goal 3 and Program H3.F to work with the VA on reducing homelessness.

The Housing Element named several specific purposes for its 2023 update, including:

- Provide a variety of housing opportunities
- Support diversity of population and housing
- Address affordable housing needs of special needs groups
- Address the needs of people experiencing homelessness

The proposed project aligns with the Housing Element's key goals and purposes, as the project will provide permanent supportive housing for Veteran households, meet housing needs for a variety of income levels, and blend well-designed new housing into the neighborhood fabric.

#### **General Plan:**

One goal of the General Plan's Land Use Element is to maintain and enhance the character, variety, and stability of Menlo Park's residential neighborhoods; MidPen would exemplify this goal by ensuring our project is compatible with its neighborhood while also bringing a below-market rate rental housing to this area of Menlo Park. This project will further the General Plan's Land Use Policy (LU 2.9) to promote residential uses in mixed use arrangements. This project will be situated directly on the VA's Palo Alto Healthcare System campus in Menlo Park, which will provide a compatible use to future Veteran households by providing them with direct access to services and programs offered by the VA.

Furthermore, one of the City's nine guiding principles is Citywide Equity and this principle specifically highlights the need to incorporate sustainable environmental planning. This project will support the City's goal, as it will be an all-electric building with rooftop Solar PV. Additional information on MidPen's sustainable practices for this project can be found in the Project Narrative section of the response.

#### **NOFA Goals:**

Our proposal for the Permanent Supportive Housing at the VA Campus meets almost all the NOFA's stated priorities. The 60 restricted units will remain affordable for at least 55 years. This project would provide the dual benefit of developing affordable, supportive rental homes on a VA-owned overflow surface parking lot and grass lot, both of which are underutilized. This project is unique because it combines the goals of the City and the VA to house Veteran households, thus, increasing the City's affordable housing stock without reducing the City's limited land supply for affordable housing. In addition, as is the case with all MidPen communities, the proposed development will also incorporate contemporary green building practices and materials to ensure energy efficiency and low utility costs.

The project has already met a number of key milestones that will help the project advance to construction at the end of 2024 and allow the City to spend housing fund expeditiously. In 2022, MidPen held a community meeting, advanced design through the schematic design phase, and secured initial project financing, including County of San Mateo AHF funds and 30 HUD-VASH Project Based Vouchers. Additionally, the project will obtain its R-4-S zoning conformance letter once the City's 2021-2023 Housing Element is adopted this year. MidPen intends to compete for State financing this summer and 9% tax credits in the first quarter of 2024. This project is expected to compete under the non-profit homeless set-aside and will utilize the 30% federal basis boost since it is located in a Difficult Development Area. We believe this project will be highly competitive given its relatively high tiebreaker.



The proposed project will provide housing for Veteran households earning extremely low- and very-low annual incomes. This future community will also incorporate five (5) two-bedroom units and two (2) three-bedroom units. Future residents will benefit from indoor and outdoor community spaces and amenities. The site is designed to conform to the City's R4S zoning. Given that the project will provide supportive housing, it is able to utilize State Density Bonus (AB 1763) and surpasses the maximum density allowed by R4S zoning designation.

Situated on the corner of Hospital Plaza and Willow Road and on the west side of Highway 101, the proposed project is located within walking distance of numerous amenities including bus lines, a hospital and clinic (VA Palo Alto Healthcare System), public parks, and grocery stores. More information about neighborhood amenities can be found in the Project Information section of the NOFA response.

Finally, MidPen has a long and successful track record of building affordable housing in Menlo Park, and has worked extensively with the community during the design and development of our projects. Future residents will benefit from MidPen's experienced Property Management and Resident Services Staff. Onsite property management staff will ensure that the property is well maintained and that residents are well supported. The onsite Resident Service staff will work with Veteran households to establish individualized goals, offer residents classes dedicated to health, wellness, financial stability, and will connect residents to services to help them maintain housing stability.

#### Project funding (please attach any additional responses)

City funds requested: \$2,000,000

Funds per assisted unit: \$33,333

Total project cost: \$59,556,584

Cost per assisted unit: \$992,609

How will the requested City funding be used? This funding will be used to cover the cost of construction. If awarded, this funding will position this project to be more competitive in the State's annual competition for funding because the City's contribution will count as leverage for the funds requested from the State. The City's funding will also help demonstrate financial readiness.

Assess the chances of the project securing required funding and steps that will be taken to make the project competitive.

The Veterans Affairs Permanent Supportive Housing project will consist of 62 homes for Veteran households earning up to 60% of AMI. The project's total development cost is \$59,556,584 (\$960,590 PDU), which includes the estimated land donation value of \$7,320,000. The development cost will primarily be covered by County Affordable Housing Fund (AHF) funds, Affordable Housing Program (AHP) funds, a land donation from the VA, Veterans Housing and Homelessness Prevention (VHHP) program financing, 9% tax credit financing, and/or other gap funding. In 2022, MidPen secured \$500,000 in County AHF funds for the proposed project and MidPen expects to apply for the remaining AHF funds needed in the next round this summer. The project was also awarded 30 HUD-VASH PBVs and applied for 5 additional HUD-VASH PBVs at the end of last year, which will help leverage a permanent loan

Below are some additional factors that can help reduce the needed gap financing, which will help make the project more competitive for future financing applications:

- **Cost Containment Strategies During Design:** MidPen has established internal processes and procedures to ensure buildings are well designed for cost containment and operations. MidPen's Building Guidelines document provides best design practices that prioritize innovative and potentially cost-saving construction materials and technology (e.g., clean concrete, mass timber, smart home technologies). Many of our best practices come from the Values Analysis (VA) process, four all-day meetings at each of the design development phases that work in concert with our Design Guidelines. At these meetings, we evaluate the design's efficiency and strategize to streamline the design. The Veterans Affairs Permanent Supportive Housing project has already completed one VA meeting and expects to complete 3 more before the project applies for tax credits in 2024.
- **Waving or Reducing Impact Fees:** Reduces the total development cost and reduces the gap financing needed. The estimated impact fees add approximately \$10,674 in cost per unit. Excluding these fees could potentially reduce the funding gap by roughly \$661,811.

The remaining gap will be covered by several available sources, including but not limited to:

County of San Mateo Affordable Housing Fund (Measure K): MidPen was awarded \$500,000 in County funds in 2022 for this project, and staff intends to apply for additional County funds this year to help reduce the financing gap. MidPen has been very successful in competing for County AHF resources, securing awards in every round since the program was first started in 2012. In 2022 we received five awards totaling \$19.9MM. We are confident that the County will support an additional request of \$5.5MM.

San Francisco Home Loan Bank Affordable Housing Program Grant (AHP): Funds awarded annually through a



competitive application process to bank members who partner with developers and community organizations to apply for AHP. Funds are available for ownership developments serving households at or below 80% AMI. In the past five years, MidPen has secured 9 AHP awards totaling \$8.5MM. MidPen has a 30-year track record with the AHP grant program and has secured nearly 50 awards since 1990.

Veterans Housing and Homelessness Prevention Program: Our team is experienced in applying for a variety of State financing sources, including VHHP. In 2021 MidPen secured 1 VHHP award for a project in Santa Cruz that will start construction this spring.

9% Low Income Housing Tax Credits: This project is expected to compete for 9% state and federal tax credits, under the non-profit, special needs (homeless) set-aside. The project utilizes the 30% federal basis boost for sites located in a DDA/QCT and has a competitive tiebreaker score of 73%. Staff intends to submit a competitive application in round 1 of 2024.

Housing Authority of the County of San Mateo - Project Based HUD-VASH Vouchers: The Housing Authority of the County of San Mateo committed 30 HUD-VASH Project-Based Vouchers to the project in October 2022.

OPTIONAL: What is the self-scored 9% tax credit tiebreaker score for the project? (Please note that you may be required to provide this during the application review) **73%**

**Developer experience (please attach any additional responses)**

Applicants may be nonprofit or for-profit affordable housing developers or owners who have affordable housing experience in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda and Santa Clara) and a successful track record of at least two years of ownership of at least two affordable, deed-restricted housing projects within the nine-county Bay Area in which 100% of the units, are targeted to those at or below 80% AMI. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement. Previous development/ownership experience must include projects that contain at least 10 units.

Years of experience: **61 years**

Number of projects: **130**

Number of projects in San Mateo County: **35 projects**

Average size of projects: **66 units**

Number of units placed in service: **8,592 Units**



|  |
|--|
| Please describe two projects completed in the last 10 years that are similar to the proposed project and provide photographs of each project:  |
| Project 1 – Project name: <a href="#">Sequoia Belle Haven</a>  |
| Location: <a href="#">Menlo Park, CA</a>   |
| Number of units: <a href="#">90</a>  |
| Type of development (senior, family, etc.): <a href="#">Senior</a>   |
| Name of project manager: <a href="#">Nesreen Kawar</a>   |
| Number of stories: <a href="#">2-3</a>   |
| Unit types (studio, 1 bedroom, etc.): <a href="#">1 bedroom, 2 bedroom</a>   |
| Type of construction: <a href="#">Type V</a>   |
| Project amenities: <a href="#">community room with kitchen; computer lab; laundry rooms; lounge with a pool table; exercise room; courtyard area, outdoor walking paths, shuffleboard</a>  |
| Entitlement date: <a href="#">June 2013</a>  |
| Occupancy date: <a href="#">April 2017</a>   |
| Funding sources: <ul style="list-style-type: none"> <li>• <a href="#">City of Menlo Park</a></li> <li>• <a href="#">County of San Mateo Department of Housing</a></li> <li>• <a href="#">Housing Authority of the County of San Mateo</a></li> <li>• <a href="#">California Tax Credit Allocation Committee</a></li> <li>• <a href="#">US Department of Housing and Urban Development</a></li> <li>• <a href="#">Federal Home Loan Bank of San Francisco (FHLB)</a></li> <li>• <a href="#">Wells Fargo Bank</a></li> </ul> |
| Project 2 – Project name: <a href="#">Laguna Commons</a>   |
| Location: <a href="#">Fremont, CA 94538</a>  |
| Number of units: <a href="#">64</a>  |
| Type of development (senior, family, etc.): <a href="#">Family, Supportive Housing</a>   |
| Name of project manager: <a href="#">Victoria Wong</a>   |
| Number of stories: <a href="#">4</a>   |
| Unit types (studio, 1 bedroom, etc.): <a href="#">studios, 1 bedroom, 2 bedrooms, 3 bedrooms</a>   |
| Type of construction: <a href="#">Type V Wood Frame</a>  |
| Project amenities: <a href="#">Community room with kitchen; computer lab; laundry room; storage space; open courtyard; locked bike storage; management and services offices</a>  |
| Entitlement date: <a href="#">June 2014</a>  |
| Occupancy date: <a href="#">October 2016</a>   |
| Funding sources: <ul style="list-style-type: none"> <li>• <a href="#">Housing Authority of the County of Alameda</a></li> <li>• <a href="#">Alameda County Behavioral Health Care Services</a></li> <li>• <a href="#">California Tax Credit Allocation Committee</a></li> <li>• <a href="#">US Department of Housing and Urban Development</a></li> <li>• <a href="#">US Department of Veterans Affairs</a></li> <li>• <a href="#">Bank of America Merrill Lynch</a></li> </ul>  |



# LAGUNA COMMONS

FAMILY & SUPPORTIVE HOUSING

Fremont, CA



MidPen Housing and Abode Services partnered to develop **Laguna Commons**, which provides much needed supportive housing for individuals and families, including veterans and formerly homeless households, in Fremont's Irvington District. Laguna Commons began construction in spring 2015 and welcomed residents in summer 2016.

To best support residents with supportive needs, services are well integrated into the fabric of the community at Laguna Commons. Supportive Services staff are onsite to help all residents access a wide range of programs, including case management, life skills training, job counseling and placement, mental health services, and substance abuse recovery therapy. These services promote self-sufficiency and assist supportive needs residents in overcoming barriers that may interfere with their ability to maintain housing.



In addition to the services provided specifically for formerly homeless residents and veterans, there are health and wellness programs offered to all residents. These programs include health education workshops, healthy cooking classes, financial literacy courses, and an after school program for youth. Residents also enjoy Laguna Commons' convenient location near grocery stores, a public park, pharmacies and transit lines.

|                            |   |            |                        |
|----------------------------|---|------------|------------------------|
| <b>Developer</b>           | Abode Services / MidPen Housing Corp.   |            |                        |
| <b>Property Management</b> | MidPen Property Management Corp.  |            |                        |
| <b>Resident Services</b>   | Abode Services  |            |                        |
| <b>Development Type</b>    | New construction: infill development  |            |                        |
| <b>Construction Type</b>   | 4-story wood frame building   |            |                        |
| <b>Site Area:</b>          | 1.5 acres   |            |                        |
| <b>Density:</b>            | 43 units / acre   |            |                        |
| <b>Parking Ratio:</b>      | .92 : 1 – 58 auto spaces, 3 motorcycle spaces   |            |                        |
| <b>Development Profile</b> | <b>Type</b>   | <b>No.</b> | <b>Size Units (sf)</b> |
|                            | Studio  | 20         | 396                    |
|                            | 1 BR  | 21         | 612                    |
|                            | 2 BR  | 12         | 871                    |
|                            | 3 BR  | 11         | 1,192                  |
|                            | <b>TOTAL</b>  | <b>64</b>  |                        |
|                            |   |            |                        |
| <b>Amenities</b>           | Community room with kitchen; computer lab; laundry room; storage space; open courtyard; locked bike storage; management and services offices  |            |                        |
| <b>Services Offered</b>    | Supportive Services Programming: <ul style="list-style-type: none"><li>• Case management</li><li>• Mental health services</li><li>• Life skills training</li><li>• Recovery support</li><li>• Job counseling and placement</li><li>• Health and wellness programs</li><li>• Educational workshops</li><li>• Financial literacy courses</li><li>• After school program for youth</li></ul> |            |                        |
| <b>Resident Profile</b>    | Families earning up to 50% of the Area Median Income  |            |                        |
| <b>Funders</b>             | <ul style="list-style-type: none"><li>• City of Fremont</li><li>• Housing Authority of the County of Alameda</li><li>• Alameda County Behavioral Health Care Services</li><li>• California Tax Credit Allocation Committee</li><li>• US Department of Housing and Urban Development</li><li>• US Department of Veterans Affairs</li><li>• Bank of America Merrill Lynch</li></ul>         |            |                        |
| <b>Architect</b>           | Ledy Maytum Stacy Architects  |            |                        |
| <b>Contractor</b>          | Devcon Construction, Inc.   |            |                        |

**Laguna Commons** | 41152 Fremont Boulevard, Fremont CA 94538

**For more information contact: Abode Services**

40849 Fremont Boulevard | Fremont, CA 94538 | Tel: 510.657.7409 | email: [info@abodeservices.org](mailto:info@abodeservices.org)

**For more information contact: MidPen Housing**

300 Vintage Park Drive, Suite 250 | Foster City, CA 94404 | Tel: 650.356.2900 | email: [info@midpen-housing.org](mailto:info@midpen-housing.org)





# SEQUOIA BELLE HAVEN

## SENIOR HOUSING

Menlo Park, CA



**Sequoia Belle Haven** represents the first phase of the revitalization of Gateway Apartments in Menlo Park. Originally developed in the 1960s, Gateway included 130 units on two city blocks serving both seniors and families. MidPen acquired the community in 1987 and invested in a light rehab at that time. Then in 2016, the housing on one of the blocks underwent a significant redevelopment and was renamed Sequoia Belle Haven. The new community provides 90 new affordable apartments for the original senior population from Gateway as well as new senior residents.

The opportunity to increase the number of affordable units from 48 to 90, for a net of 42 additional affordable apartments, was made possible in 2013 when the City of Menlo Park rezoned Sequoia Belle Haven's site for higher density. The design of the



community supports the goal of healthy living, with a continuous pathway connecting outdoor gathering spaces, common spaces, and protected courtyards. The community employs several green features, such as photovoltaic solar panels, high-efficiency windows and solar hot water systems, Energy Star appliances, and drought-tolerant landscaping. Sequoia Belle Haven also includes: a community room for large gatherings, a lounge, a computer lab, an exercise room, and two laundry rooms.

Through a network of service providers, MidPen Services will coordinate onsite programs designed to help residents live healthy, independent lives.

|                            |   |            |                        |
|----------------------------|---|------------|------------------------|
| <b>Developer</b>           | MidPen Housing Corp.  |            |                        |
| <b>Property Management</b> | MidPen Property Management Corp.  |            |                        |
| <b>Development Type</b>    | New construction  |            |                        |
| <b>Construction Type</b>   | Type V - 2 & 3 Stories, elevator-served   |            |                        |
| <b>Site Area:</b>          | 2.91 acres  |            |                        |
| <b>Density:</b>            | 30.9 units / acre   |            |                        |
| <b>Parking Ratio:</b>      | .87 : 1 – 78 spaces   |            |                        |
| <b>Development Profile</b> | <b>Type</b>   | <b>No.</b> | <b>Size Units (sf)</b> |
|                            | 1 BR  | 86         | 539 - 636              |
|                            | 2 BR  | 4          | 739                    |
|                            | <b>TOTAL</b>  | <b>90</b>  |                        |
|                            |   |            |                        |
| <b>Amenities</b>           | Community room with kitchen; computer lab; fitness center; courtyard area; outdoor walking path; lounge with pool table; shuffleboard |            |                        |
| <b>Services Offered</b>    | Health & Wellness Programming:  |            |                        |
|                            | • Educational workshops   |            |                        |
|                            | • Computer literacy workshops   |            |                        |
|                            | • Life skills development   |            |                        |
|                            | • Nutrition classes   |            |                        |
| <b>Services Offered</b>    | • Group exercise classes  |            |                        |
|                            | • Health fairs/health screens   |            |                        |
|                            | • "Brown Bag" food assistance programs  |            |                        |
|                            | Social Programming:   |            |                        |
|                            | • Arts and crafts   |            |                        |
| <b>Services Offered</b>    | • Holiday celebrations  |            |                        |
|                            | • Other social events   |            |                        |
|                            | Connection to Community Resources   |            |                        |
|                            |   |            |                        |
| <b>Resident Profile</b>    | Seniors earning up to 50% of the Area Median Income   |            |                        |
| <b>Funders</b>             | • City of Menlo Park  |            |                        |
|                            | • County of San Mateo Department of Housing   |            |                        |
|                            | • Housing Authority of the County of San Mateo  |            |                        |
|                            | • California Tax Credit Allocation Committee  |            |                        |
|                            | • US Department of Housing and Urban Development  |            |                        |
|                            | • Federal Home Loan Bank of San Francisco   |            |                        |
|                            | • Wells Fargo Bank  |            |                        |
|                            |   |            |                        |
| <b>Architect</b>           | Mithun, Inc.  |            |                        |
| <b>Contractor</b>          | Devcon Construction, Inc.   |            |                        |

**Sequoia Belle Haven** | 1221 Willow Road, Menlo Park, CA 94025

**For more information contact: MidPen Housing**

303 Vintage Park Drive, Suite 250 | Foster City, CA 94404 | Tel: 650.356.2900 | email: [info@midpen-housing.org](mailto:info@midpen-housing.org)





| Personnel   |                       |   |   |                           |
|---|-----------------------|---|---|---------------------------|
| List the names of key members of the applicant's development team, their titles, responsibilities and years of experience in affordable housing.  |                       |   |   |                           |
| Project Staff   | Name                  | Role in proposed project  | Years of housing development experience | Years with this developer |
| Project manager   | Cynthia Luzod         | Day-to-day project management   | 6 Years                                 | 4 Years                   |
| Director of real estate development   | Abby Goldware Potluri | High-level project oversight  | 15 years                                | 15 Years                  |
| Executive director  | Matt Franklin         | Executive Oversight   | 25+ Year                                | 15 Years                  |
| Chief financial officer   | Mick Vergura          | Executive Oversight   | 15 Years                                | 4 Years                   |
| Other   | Shwetha Subramanian   | Chief Real Estate Development Officer - Executive Oversight                   | 18 Years                                | 1 Year                    |
| Other   | Alice Talcott         | Vice President, Housing Finance - Lead & advise on project financing strategy | 20+ Years                               | 10 Years                  |
| Indicate which of the following development team members have been selected and identify them if different from applicant.  |                       |   |   |                           |
| Developer: MidPen Housing Corporation   |                       | Architect(s): Van Meter Williams Pollack, LLP                                 |   |                           |
| Engineer(s): BKF Engineers, Emerald City Engineers, Element Structural Engineers, Partners Energy, Aesculus Consulting Arbor, Luk & Associates, Jett Landscape Architecture   |                       | General contractor: Guzman Construction                                       |   |                           |
| Attorney(s) and/or tax professionals: Evan Gross, Gubb & Barshay  |                       |   |   |                           |
| Property management agent: MidPen Housing Property Management   |                       |   |   |                           |
| Financial and other consultant(s): California Housing Partnership Corporation   |                       |   |   |                           |
| Investor(s): TBD  |                       |   |   |                           |
| List all other participants and affiliates (people, businesses, and organizations) proposing to participate in the project.   |                       |   |   |                           |
| Name  |                       | Address   |   |                           |
|   |                       |   |   |                           |
|   |                       |   |   |                           |
|   |                       |   |   |                           |
|   |                       |   |   |                           |
|   |                       |   |   |                           |
| Describe how the property will be managed including the number of staff, locations and management office hours.   |                       |   |   |                           |
| <p>Formed in the 1980s, MidPen Property Management Corporation ("MidPen Management"), an affiliate of MidPen Housing Corporation, has decades' long experience in all aspects critical to property management, including marketing and outreach, property lease-up and unit turnover, compliance, operations, training, facility maintenance, and community relations. This property will be managed by MidPen Management. Below is a breakdown of the property management staff dedicated to the proposed project:</p> <ul style="list-style-type: none"> <li>• 1 FTE Community Manager</li> </ul> |                       |   |   |                           |



- 1 FTE Maintenance Technician
- 1 FTE Janitor
- 1 FTE Lead Desk Clerk
- 2 PTE Desk Clerks

The Community Manager will live onsite at the property and will be available to residents outside of normal business hours. The Desk Clerk will be assigned to the property on weekday evenings and on weekends. We believe this is an appropriate level of staffing to successfully manage the property, as well as to provide evening and weekend staff presence. Office staff is responsible for performing initial and annual income certifications, rent collection, complaint resolution, accepting work orders from residents, preparation and service of warning and/or legal notices, and the overall day to day operations of the property.

If the project will be managed by an agency other than the project applicant describe the project applicant's role in the ongoing management of the project and resolution of management issues.

N/A



**Applicant certification**

I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and or information herein are found to be misrepresented it shall constitute grounds for disqualification of my proposal. I further certify that the following statements are true except if I have indicated otherwise on this certification:

- ☒ I have not sold any of the projects listed on the 10 Year Projects list
- ☒ No mortgage on a project listed by me has ever been in default
- ☒ Government, or foreclosed, nor has mortgage relief by the mortgagee been given
- ☐ I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list
- ☒ To the best of my knowledge there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past 10 years
- ☒ I have not been suspended, been barred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs
- ☒ I have not failed to use state funds or LIHTC allocated to me in any state

I have checked each deletion, if any, and have attached a true and accurate signed statement, if applicable; to explain the facts and circumstances that I think help to qualify me as a responsible principal for participation in this NOFA.

DocuSigned by:  
*Shwetha Subramanian*  
F058A1E7902449A...  
Signature

1/26/2023 | 11:13:59 AM PST  
Date

Shwetha Subramanian  
Printed name

Chief Real Estate Development Officer  
Title

This application and all supporting material are regarded as public records under the California Public Records Act.



## **City of Menlo Park NOFA Community Development – Housing Division Veterans Affairs Permanent Supportive Housing**

### **Applicant Certification – Explanation**

*I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list*

Response: MidPen Housing Corporation and its affiliates are the owner/developer/operator for over 8,300 apartments at 126 properties. Per more restrictive guidance from the Internal Revenue Service, Low-Income Housing Tax Credit recipients are now more frequently receiving 8823s. These findings are typically easily repaired and resolved without delay during the inspection.



### **Applicant supporting material**

In addition to submitting a complete application, the following additional supporting material must be provided with the application:

1. Cover letter: Provide a brief summary of the proposed project and discuss your agency's qualifications and why your proposal should be selected for funding.
2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.
3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.
4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.
5. Experience (owner/developer and property manager): Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.
6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.
7. Financial proforma: Please provide detailed financial information for the proposed project including permanent and construction fund sources, detailed permanent development budget, unit affordability mix/rent schedule, operating budget and 30-year cash flow. If the project will use tax credits, please provide the tax credit calculations.
8. Photos: Attach recent clearly labeled photos of the project site and surrounding area.
9. Board of directors: Provide a listing of the board of directors including the city of residence.





Building Communities. Changing Lives.

January 26, 2023

Eren Romero  
City of Menlo Park  
Community Development – Housing Division  
701 Laurel Street  
Menlo Park, CA 90425

Dear Eren Romero,

MidPen is thrilled to continue our partnership with the City of Menlo Park and to build 62 new affordable rental homes for Veterans earning up to 50% of Area Median Income. The Veterans Affairs Permanent Supportive Housing project presents a unique opportunity to bridge health and housing by building homes for Veterans on the VA Palo Alto Health Care System in Menlo Park. This is also a tremendous opportunity to increase the number of affordable and supportive homes in Menlo Park, through infill housing on VA-owned land, without reducing the limited availability of land for affordable housing in Menlo Park. If awarded, this City BMR funding would position the Veterans Affairs Permanent Supportive Housing project to be even more competitive for critical State and tax credit financing that our team will apply for in June 2023 and April 2024, respectively.

MidPen plans to transform the VA's underutilized parking lot into a 62-unit supportive housing community for Veterans and their families who are formerly homeless or at-risk of homelessness. This future community, located directly on the VA Palo Alto Healthcare System campus, will serve residents with a household income of 30-50% of Area Median Income (AMI). The 2-3 story building will be made up of 54 one-bedroom units, 4 two-bedroom units, 2 three-bedroom units, 1 two-bedroom Manager's unit, and 1 one-bedroom Manager's unit. MidPen has the expertise to design, finance, build, and manage this future permanent supportive housing community in Menlo Park.

As the premier affordable housing developer in San Mateo County, we have an exceptional track record of partnering with cities and local community organizations to produce housing that meets the community's vision and becomes part of the community fabric. MidPen has a strong, experienced team that is committed to create more permanent supportive housing. MidPen Property Management has a practiced team of property management professionals who will be dedicated to lease up and operations. We understand the importance of providing responsive and culturally appropriate services on site to future residents, and, to that end, MidPen Resident Services will work with VA Case Managers to provide robust onsite supportive services, complementing the services offered by MidPen Services. Using our nearly 50 years of experience, MidPen will ensure that the Veterans living at this future community will not only be housed but set on a path to stability and independence.

Since our founding in 1970, MidPen has developed or rehabilitated over 8,500 affordable homes, with more than 4,000 homes in active development. Some prominent examples of our experience in Menlo Park are the new construction community Sequoia Belle Haven and its neighboring Gateway Rising currently under construction as well as Willow Terrace, which we acquired and rehabilitated in the 1980s. These properties continue to be outstanding examples of quality affordable homes and we look forward to welcoming residents to Gateway Rising this summer. MidPen is well-versed in incorporating the City's





public outreach procedures with our best practices for collaborative and transparent community engagement.

We look forward to working with the City to build new permanent supportive housing for Veterans at VA Campus to give formerly homeless and at risk of homelessness Veterans a permanent and safe place to call home.

Sincerely,

DocuSigned by:

*Shwetha Subramanian*

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Shwetha Subramanian

Chief Real Estate Development Officer



## **Veterans Affairs Permanent Supportive Housing**

### **2. Community Outreach Plan**

Enclosed are the following documents:

1. Community Outreach Plan
2. July 26, 2022 Neighborhood Meeting Presentation: this slide deck was presented to attendees who joined the 7/26/22 virtual neighborhood meeting, in which MidPen and Veterans Affairs staff introduced the Veterans Affairs Permanent Supportive Housing project



## **MidPen Housing Community Outreach Plan Veterans Affairs Permanent Supportive Housing**

*Community outreach is a fundamental component of MidPen Housing Corporation's approach to development. MidPen is committed to conducting a thoughtful and comprehensive outreach process that involves conversations with broad groups of stakeholders including neighbors, community leaders, potential residents, and others. This plan outlines MidPen's goals and plans to solicit feedback from residents, neighbors and other key stakeholders for the development of Veterans Affairs Permanent Supportive Housing, a future 62-unit affordable housing community for formerly homeless and at-risk of homelessness veterans and their families in Menlo Park. The information below presents a summary of our outreach plan for this community.*

### **Community Outreach (1): One-on-One Conversations**

Purpose: Understand the issues, concerns, and desires of existing residents, key neighbors and/or community leaders. MidPen will conduct targeted meetings with all neighbors immediately adjacent to the proposed project site as well as other key parties that may have particular interest or concerns with the development. We will also conduct meetings with any key community groups. These neighbors/organizations will have a full opportunity to ask questions and provide feedback, which will inform our future outreach approach and help MidPen identify key concerns or issues.

#### **Goals:**

1. Introduce MidPen and the proposed project
2. Listen to stakeholders' goals, vision, and concerns
3. Outline MidPen's development process, including lease-up, resident population, community outreach, and timing/schedule.
4. Incorporate stakeholder feedback wherever possible

#### **Key Organizations and Stakeholders:**

- San Mateo County, Department of Housing
  - Met on August 19, 2019 (prior to being selected by the VA)
- Menlo Together
  - Met on July 18, 2022
- Housing Leadership Council
  - Met on March 29, 2022
- SF YIMBY
  - Met on December 6, 2022
- City of Menlo Park, Mayor Betsy Nash
  - Met on July 18, 2022 (during Menlo Together Meeting)
- City of Menlo Park: Community Development, Public Works, Planning Departments and City Manager
  - Met on January 8, 2020 - Introduce the project and solicit feedback
  - Met on September 9, 2020 – Discussed entitlement path with Assistant Community Development Director, Deanna Chow



- *Met on September 21, 2021 – Discuss City’s Housing Element, CEQA report,*
- *Met on April 29, 2022 - Development Review Team: met with various City departments to introduce project and review City requirements*
- Planning/Community Development: Deanna Chow, Assistant Community Development Director
- District 2 Councilmember Drew Combs
  - *Met on July 15, 2022*
- District 3 Councilmember Jen Wolosin
  - *Met on June 29, 2022*

Timeline: Outreach was officially initiated in March 2022, but additional outreach took place prior to that date. MidPen will continue to hold meetings through the lease-up process. We will meet with additional groups as necessary or as we become aware of additional stakeholders during the outreach process.

## **Community Outreach (2): Virtual Neighborhood Community Meeting**

Purpose: Introduce community members to MidPen Housing, the Veterans Affairs, and the project to build trust and solicit feedback.

### Goals:

1. To formally introduce MidPen and VA and our vision for the site to residents, businesses, and community members in the surrounding neighborhood in a public setting
2. Understand the goals and priorities of the community
3. Introduce the project concept, timeline, and next steps
4. Incorporate feedback when possible

Venue: Jointly hosted by the VA and MidPen on Zoom

Background: MidPen co-hosted with the VA an introductory meeting/presentation about the proposed community on **July 26, 2022**. All neighbors within a 0.25-mile radius of the property received a notice of the meeting and will be given ample opportunity for public comment and 28 members of the community were in attendance. Representatives from MidPen’s development, property management, and resident services teams, as well as the architect team were available to answer questions and listen to input. This was an opportunity for attendees to meet MidPen’s team, understand the development schedule, design concept, listen to community feedback and input, and field questions.

### Marketing:

- Email invitations were sent to all Stakeholders listed above, including City Council, Planning Commission, Housing Commission, Menlo Together, and Housing Leadership Council
- Mail invitations were sent to neighbors located within a 0.25-mile radius of the property

Timeline: Meeting took place on July 26, 2022



# Veteran Housing in Menlo Park

July 26, 2022







# Logistics

# Agenda

# Contact

- Recorded Meeting
- Participants Muted/Chat Disabled until Q&A
- Department of Veterans Affairs
- MidPen Housing
- Questions and Answers
- Cynthia Luzod, MidPen Housing
- (510) 671-1782
- [Cynthia.luzod@midpen-housing.org](mailto:Cynthia.luzod@midpen-housing.org)



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# Department of Veterans Affairs

To fulfill President Lincoln's promise “To care for him who shall have borne the battle, and for his widow, and his orphan” by serving and honoring the men and women who are America’s Veterans





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# Ending Veteran Homelessness

“No Veteran Should Be Without a Place to Call Home”

- The VA is dedicated to:
  - Conducting coordinated outreach to proactively seek out Veterans in need of assistance
  - Collaborating with external partners to connect homeless and at-risk Veterans with housing solutions, health care, community employment services and other required supports
- Extended Use Leasing (EUL) Authority
- MidPen Housing was selected, through a competitive process, to develop supportive housing on underutilized land located on the VA Palo Alto Health Care System, Menlo Park Division





**VA Palo Alto Health Care System  
Campus**

**Willow  
Housing  
(CORE)**



**Project Site**



**Willow Road**



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# MidPen Housing Mission

Our mission is to provide **safe, affordable housing of high quality** to those in need and to establish **stability and opportunity** in the lives of our residents, and **foster diverse communities** that allow people from all ethnic, social and economic backgrounds to **live in dignity, harmony and mutual respect.**





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# MidPen's Experience

- We own & manage **8,500** homes at **120** properties serving over **17,500** residents across the Bay Area
- **Deeply Rooted** in San Mateo County & Menlo Park
  - **38** existing communities in SMC, **6** of which provide permanent supportive housing
  - **4** existing communities in Menlo Park, providing **209** affordable homes
- **Open and Intentional** Community Engagement



Sequoia Belle Haven, Menlo Park



Gateway Rising, Menlo Park



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# Property Management

*MidPen's approach to property management is based on three core values:*

## Being Good Neighbors:

*We strive to ensure that every community we manage benefits both our residents as well as the surrounding neighborhood.*

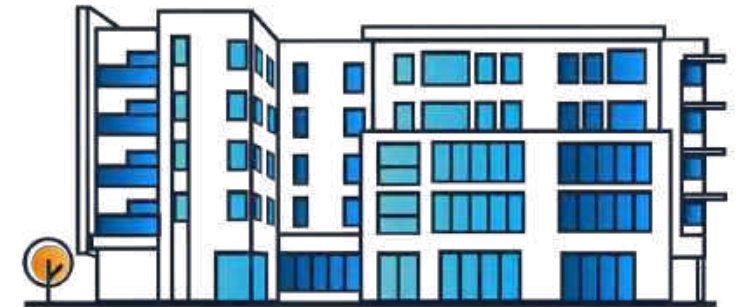


## Enhancing Resident's Lives:

*Our staff responds to individual and community needs with a commitment to customer service.*

## Sustainable Operations and Maintenance:

*Retrofits to improve building performance, water conservation, and indoor air quality; using drought resistant landscaping and green cleaning products; and training on environmentally-friendly practices.*





# Resident Services

*Empowering residents through robust and impactful service offerings:*

## Three distinct programs to serve:

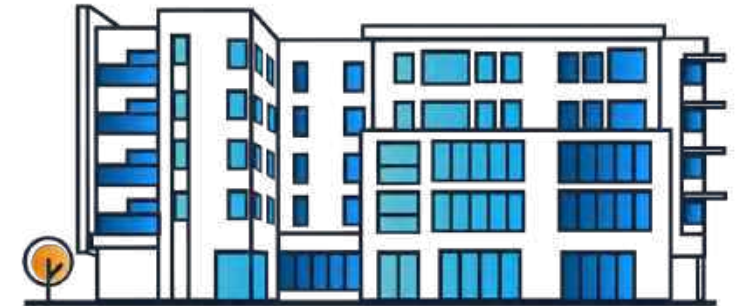
- Families – working adults and youth
- Seniors
- Special needs individuals (supportive housing)



**2 decades** of experience working with supportive housing communities

**Intentional Support** to help residents advance in all areas of their lives through:

- ❖ Academically-based after school programs
- ❖ Workforce Development
- ❖ Financial capability programs for adults
- ❖ Health programs to help seniors age in place







# Poll!

What brought you  
here today?



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# Project Information

- Located on 2.14 acres on the VA Palo Alto Healthcare System Campus, Menlo Park Division
- 3 stories with 2-story setback from Willow Road
- 62 homes (including 2 Manager's unit):
  - 54 one-bedroom
  - 4 two-bedrooms
  - 2 three-bedrooms
  - 2 Manager's units
- 54 parking spaces (0.87 parking ratio)





# Site & Landscaping Plan





# Northeast Corner of the Site





# Southeast Corner of the Site





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# Who Will This Community Serve?

Veterans and their families who are formerly homeless or at-risk of homelessness

*“After the grievous loss of my wife triggered trauma from my experience in Vietnam, I spiraled into alcoholism, which led to me losing my job and my home. I became homeless. Between a beautiful apartment and valuable services, MidPen gave me a second chance at life. I’m sober and healthy and love volunteering in my community. We need more programs like this.”*

- Ron Rodriguez

*Formerly Homeless U.S. Veteran and Current MidPen Resident living at Onizuka Crossing*





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# Affordability

This community will serve extremely low to very low-income households, earning between 30% - 50% of Area Median Income

| Income Level           | Household Size |          |          |          |           |           |
|------------------------|----------------|----------|----------|----------|-----------|-----------|
| % of Area Media Income | 1              | 2        | 3        | 4        | 5         | 6         |
| 30% AMI                | \$39,150       | \$44,750 | \$50,350 | \$55,900 | \$60,400  | \$64,850  |
| 40% AMI                | \$46,480       | \$53,120 | \$59,760 | \$66,400 | \$71,720  | \$77,020  |
| 50% AMI                | \$65,250       | \$74,600 | \$83,900 | \$93,200 | \$100,700 | \$108,150 |





# Poll!

What brought  
you here today?





## Project Development Schedule

- July 26, 2022: Community Meeting
- February 2023: Housing Element Adopted
- Q4 2024: Construction Start
- Q3 2025: Construction End



# Questions & Discussion

## Questions via Q&A Box

1. Click the Q&A box



2. Type your question(s) in the box that pops up



3. The host will place your question in chronological order and assign the correct panelist to answer your question

## Questions via Raise Hand

1. Click the Q&A box



2. You will be listed chronologically and called to answer your question by the host. Please wait patiently until called and the host will unmute you during your turn





Before  
you  
go...







# Poll!

What do you love  
about your  
neighborhood &  
Menlo Park?



## **Veterans Affairs Permanent Supportive Housing**

### **3. Site Control Documents**

The US Department of Veteran's Affairs (the 'VA') currently owns the project site. The proposed project Owner is a to-be-formed limited partnership with an affiliate of MidPen Housing Corporation (the applicant) serving as the general partner. The to-be-formed limited partnership will have a leasehold interest in the land and fee interest in the improvements. This leasehold interest will be established through an Enhanced Use Lease Agreement with the VA.

Enclosed is a letter from the U. S. Department of Veterans Affairs, evidencing its commitment to enter into an Enhanced Use Lease Agreement. This agreement will be signed after the project receives a tax credit award and before the project closes its construction financing. Please note the enclosed letter was provided for a different application. The VA is authorized to lease land and improvements to non-Federal entities that provide supportive housing and on-site community-based support services for Veterans and their families. Such leases can have a term of up to 99 years.





**DEPARTMENT OF VETERANS AFFAIRS**  
**WASHINGTON DC 20420**

August 10,2022

Department of Housing: County of San Mateo  
c/o: Steve Crounse  
264 Harbor Blvd A  
Belmont, CA 94002

Re: Evidence of Site Control – VA Meno Park EUL – 795 Willow Road, Menlo Park, CA

Dear Mr. Crounse:

The purpose of this letter is to express the U.S. Department of Veterans Affairs (VA) support of the San Mateo County - Affordable Housing Fund application with MidPen Housing Corporation (MidPen). This financing, if approved, would help support MidPen to develop approximately 62 units (including 2 manager's units) of permanent supportive housing for homeless and "at-risk" Veterans and their families at the VA Palo Alto Health Care System - Menlo Park Division, located at 795 Willow Road in Menlo Park, on the corner of Willow Road and Hospital Plaza. MidPen is pursuing the development of this housing as the selected Developer under an enhanced-use lease (EUL) Request for Proposal in April 2019. This EUL public-private partnership affords MidPen a degree of site control to perform due diligence and other predevelopment activities in support of the proposed project.

VA selected MidPen after a public hearing following a full and open solicitation process. The proposed project is part of VA's Building Utilization Review and Repurposing (BURR) initiative that the Secretary of Veterans Affairs approved on May 19, 2011. BURR is a strategic effort to help end Veteran homelessness by repurposing underutilized and vacant VA land and buildings through EUL agreements that provide housing for homeless and at-risk Veterans. Such agreements permit third-party providers, such as MidPen, to finance, design, develop, maintain and operate housing with on-site supportive services, on a priority basis, for Veterans and their families. The co-location of these projects on VA medical center campuses ensures that Veterans have ready access to care and treatment designed to help them attain long-term independence and self-sufficiency.

As evidence of the Department's support of this project, it is contemplated that VA will grant MidPen a leasehold interest in the land parcel for up to seventy-five (75) years, via the execution of an EUL agreement. While MidPen will provide priority placement for Veterans and supportive services for residents and their families, the annual lease payment to VA will be one dollar.



Consistent with the above, VA supports MidPen' s application to the San Mateo County - Affordable Housing Fund, which will help MidPen develop the proposed supportive housing for homeless Veterans and at-risk Veterans and their families at the VA Palo Alto Health Care System - Menlo Park Division.

Should you have any questions or concerns, please do not hesitate to contact Portfolio Manager, De Carol Smith at 202-697-2257 or via email at [DeCarol.Smith@va.gov](mailto:DeCarol.Smith@va.gov).

Sincerely,

A handwritten signature in dark ink that reads "C. Brett Simms". The signature is written in a cursive, slightly slanted style.

C. Brett Simms  
Designated VA Representative



**City of Menlo Park**  
**2023 NOFA Application Attachments**

## **Veterans Affairs Permanent Supportive Housing**

### **4. Development Schedule**



# Development Schedule

9% LIHTC

| Task  | Status      | Date           |
|---|-------------|----------------|
| <b>Developer Selection and Site Control</b>                   |             |                |
| Developer Selection via Competitive RFQ                       | Complete    | October 2019   |
| Execute Site Control Agreement                                | In Progress | February 2023  |
| Execute Extended Use Lease (EUL)                              | Not started | October 2024   |
| <b>Design/Entitlements</b>                                    |             |                |
| Community Meeting with Neighbors                              | Complete    | July 2022      |
| NEPA Approval   | Complete    | September 2022 |
| City of Menlo Park 2023-2031 Housing Element Adopted          | In Progress | January 2023   |
| Entitlement Approval (City Director Approves Design & Zoning) | In Progress | February 2023  |
| Building Permit Submittal                                     | Not Started | September 2024 |
| Building Permits Issued                                       | Not Started | December 2024  |
| <b>Financing/Construction</b>                                 |             |                |
| Submit County AHF 10.0 Application                            | Complete    | August 2022    |
| County AHF 10.0 Award   | Complete    | October 2022   |
| HUD VASH PBV Award (30 vouchers)                              | Complete    | October 2022   |
| Submit City of Menlo Park NOFA Application                    | In Progress | January 2023   |
| City of Menlo Park NOFA Award                                 | Not Started | Spring 2023    |
| Submit AHP Application  | Not Started | March 2023     |
| AHP Award   | Not Started | May 2023       |
| Submit HCD SuperNOFA  | Not Started | July 2023      |
| HCD SuperNOFA Award   | Not Started | December 2023  |
| Submit 9% Tax Credit Application                              | Not Started | March 2024     |
| 9% Tax Credit Award   | Not Started | June 2024      |
| Close Construction Financing                                  | Not Started | December 2024  |
| Start Construction  | Not Started | December 2024  |
| End Construction  | Not Started | March 2026     |
| 100% Occupancy  | Not Started | July 2026      |

\*Please note this schedule for submitting a 9% TCAC application is contingent on successful applications and the County's funding commitment.



## **Veterans Affairs Permanent Supportive Housing**

### **5. Experience**

#### **MidPen Housing Corporation**

For more than 50 years, MidPen Housing Corporation ("MidPen") has been one of the largest, most trusted developers and owners of high-quality affordable rental housing in Northern California. We have played a leading role in the growth of the affordable housing industry in California, consistently setting new standards for best practices in development, property management, and resident services.

MidPen operates through three distinct non-profit companies that work closely together to manage corporate activities and partnerships, while furthering its mission to provide safe, affordable housing of high quality. MidPen drives all the development efforts which include property acquisition, planning, design, construction, renovation, and existing property rehabilitation. It also serves as the corporate umbrella and houses all administrative functions: Finance, HR and IT. MidPen Property Management Corporation provides professional property management for its properties as well as fee-based management for other non-profit affordable housing communities. MidPen Resident Services Corporation provides and coordinates robust onsite support programs to help residents, with wide range of needs, advance in their well-being.

MidPen has extensive experience in the development of affordable housing. Since it was founded in 1970, MidPen has achieved recognition as a leading non-profit sponsor and developer of affordable housing. MidPen has constructed or rehabilitated more than 8,300 residential units for low-income families, seniors, farm workers, and physically, mentally, or developmentally disabled people throughout Northern California. MidPen has housing communities in Alameda, Contra Costa, Monterey, Napa, San Benito, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, and Yuba Counties. Of our total portfolio, 27 properties house special needs populations and 8 are in San Mateo County.

MidPen has a proven track record of developing affordable housing in suburban and infill sites that blend successfully into the surrounding community. MidPen's keen attention to both design and community has resulted in over 150 industry awards and honors including the following:

- Half Moon Village - Sustainable San Mateo County Award - 2016
- Stevenson Terrace, Structures Award – Best Affordable Project Winner, Silicon Valley Business Journal – 2020
- Donner Lofts - Structures Award – Best Affordable Residential Project Winner, Silicon Valley Business Journal - 2015
- Station Center - 2013 ULI National Award Winner
- Fair Oaks Plaza, Affordable Housing Finance Reader's Choice Award
- 636 El Camino - Sustainable San Mateo County Award - 2012
- Peninsula Station - Sustainable San Mateo County Award - 2010
- Edwina Benner Plaza – AHF Editors' Choice Award - 2019
- Shirley Chisholm Village – Golden Nugget Grand Award – Best On-the Boards Affordable Housing Community, Pacific Coast Builders Conference – 2021
- Paseo Estero & Vista Estero – Real Estate Deal of the Year – Best Affordable Residential – SF Business Times – 2021
- Firehouse Square – Beautiful Belmont Award, Mixed use Category, City of Belmont – 2022



MidPen has the demonstrated capacity to complete a project on time and on budget. In addition, San Mateo County has been and remains a core focus area for us. Our recent projects in pre-construction include Midway Village (phases II-IV) in Daly City, Broadway Plaza in Redwood City, Cypress Point in Moss Beach and 965 Weeks in East Palo Alto, all projected to be completed between 2023 and 2028. Firehouse Square in Belmont recently completed construction in 2022, Gateway Rising in Menlo Park, Midway Village – Phase I in Daly City, and Kiku Crossing in San Mateo are all currently under construction with expected completions in 2023 and 2024. Sequoia Belle Haven in Menlo Park, Serenity Senior Apartments in East Palo Alto, and Sweeney Lane in Daly City, all of which completed construction in 2017, and Mosaic Gardens in Redwood City, which completed a substantial renovation in 2019. Arroyo Green and Shores Landing in Redwood City were completed in 2021.

### **MidPen Property Management Company**

In the mid- 1980s, MidPen formed an in-house Property Management Company, MidPen Property Management (MPPMC). MPPMC owns and manages 8,592 homes in 130 communities. Our management company includes a well-seasoned team with extensive experience in all aspects critical to property management, including compliance, operations, training, facility maintenance, and community relations. We take pride in keeping our communities safe, beautiful, and well maintained for the long term. MPPMC has an excellent track record reflected in the high occupancy maintained across our portfolio. Over the last 12 months, our occupancy has averaged over 98%.

MPPMC manages 1,787 units at 35 properties across San Mateo County. MPPMC and MidPen Resident Services Staff work side-by-side at our properties to provide comprehensive on-site management and services and have developed a strong rapport and communication systems. MidPen's approach to property management is based on three core values:

- **Being Good Neighbors:** MidPen Management strives to ensure that every community we manage benefits both our residents as well as the surrounding neighborhood.
- **Enhancing Residents' Lives:** Our staff responds to individual, and community needs with a commitment to customer service.
- **Commitment to Sustainable Operations and Maintenance:** This includes retrofits to improve building performance, water conservation and indoor air quality; using drought resistant landscaping and green cleaning products; and training residents on environmentally friendly practices.

Communities that involve a population of a similar demographic that MidPen Property Management manages are as follows: Arroyo Green, Laguna Commons, Mosaic Gardens, Onizuka Crossing, St. Stephens, Stevenson Terrace.

The following pages contain a list of properties owned and operated by MidPen Property Management Company.



# MidPen Housing Corporation Property List

| Property Name (DBA)        | Address  | City                | County      | Zip Code | Occupancy Type<br>(Budget Reporting) | Residential Units | PIS / TCO | Years Under Ownership/<br>Management |
|----------------------------|--|---------------------|-------------|----------|--------------------------------------|-------------------|-----------|--------------------------------------|
| Arroyo Green               | 707 & 715 Bradford Street  | Redwood City        | San Mateo   | 94063    | Senior                               | 117               | 2022      | <1                                   |
| Avance                     | 4260 First Street  | Livermore           | Alameda     | 94551    | Special Needs                        | 45                | 2022      | <1                                   |
| Foon Lok West              | 311 9th Avenue   | Oakland             | Alameda     | 94606    | Family/Supportive                    | 130               | 2022      | <1                                   |
| Firehouse Square           | 1300 El Camino   | Belmont             | San Mateo   | 94002    | Family                               | 66                | 2022      | <1                                   |
| Paseo Estero 4%            | 255 8th Ave  | Oakland             | Alameda     | 94606    | Family                               | 60                | 2022      | 1                                    |
| Paseo Estero 9%            | 255 8th Ave  | Oakland             | Alameda     | 94606    | Family                               | 41                | 2022      | 1                                    |
| Vista Estero               | 285 8th Ave  | Oakland             | Alameda     | 94606    | Senior                               | 110               | 2022      | 1                                    |
| Sunset Pines               | 1705 Sunset Ave  | Fairfield           | Solano      | 94533    | Family                               | 36                | 2021      | 2                                    |
| Celestina Garden           | 125 Dorene Way   | Sonoma              | Sonoma      | 95476    | Senior                               | 40                | 2020      | 3                                    |
| Moon Gate Plaza            | 21 Soledad Street  | Salinas             | Monterey    | 93901    | Special Needs                        | 90                | 2020      | 3                                    |
| Shorebreeze Expansion      | 460 N. Shoreline Boulevard   | Mountain View       | Santa Clara | 94043    | Family                               | 62                | 2020      | 3                                    |
| Chestnut Square Family     | 1625-1635 Chestnut Street  | Livermore           | Alameda     | 94551    | Family                               | 42                | 2020      | 2                                    |
| Chestnut Square Senior     | 1651 Chestnut Street   | Livermore           | Alameda     | 94551    | Senior                               | 72                | 2019      | 2                                    |
| Kottinger Gardens II       | 240 Kottinger Drive  | Pleasanton          | Alameda     | 94566    | Senior                               | 54                | 2019      | 3                                    |
| Posolmi Place              | 183 Alcalanes Drive  | Sunnyvale           | Santa Clara | 94086    | Family                               | 24                | 2019      | 4                                    |
| Stevenson Terrace          | 39605 Stevenson Place  | Fremont             | Alameda     | 94538    | Family                               | 80                | 2019      | 2                                    |
| Sunset Creek               | 840 E. Travis Blvd.  | Fairfield           | Solano      | 94533    | Family                               | 76                | 2019      | 2                                    |
| Mosaic Gardens             | 3752, 3762, and 3770 Rolison Road  | Redwood City        | San Mateo   | 94063    | Family                               | 55                | 2019      | 4                                    |
| Edwina Benner Plaza        | 460 Persian Drive  | Sunnyvale           | Santa Clara | 94089    | Family                               | 66                | 2018      | 5                                    |
| Kottinger Gardens I        | 240 Kottinger Drive  | Pleasanton          | Alameda     | 94566    | Senior                               | 131               | 2018      | 5                                    |
| Pippin Orchards            | 56 Atkinson Lane   | Watsonville         | Santa Cruz  | 95076    | Family                               | 46                | 2018      | 3                                    |
| Van Buren                  | 669 Van Buren Street   | Monterey            | Monterey    | 93940    | Senior                               | 19                | 2018      | 5                                    |
| City Center Plaza          | 950 Main Street  | Redwood City        | San Mateo   | 94063    | Family                               | 81                | 2017      | 5                                    |
| Fetters                    | 17310 Sonoma Highway   | Sonoma              | Sonoma      | 95476    | Family                               | 60                | 2017      | 4                                    |
| Sequoia Belle Haven        | 1221 Willow Road   | Menlo Park          | San Mateo   | 94025    | Senior                               | 90                | 2017      | 4                                    |
| Serenity Senior Apartments | 2358 University Avenue   | East Palo Alto      | San Mateo   | 94303    | Senior                               | 41                | 2017      | 4                                    |
| St. Stephens               | 2500 Soquel Avenue   | Santa Cruz          | Santa Cruz  | 95062    | Senior                               | 40                | 2017      | 4                                    |
| Sweeney Lane               | 6800 Mission Street  | Daly City           | San Mateo   | 94014    | Family                               | 52                | 2017      | 4                                    |
| 168 Pacific                | 168 Pacific  | Pacifica            | San Mateo   | 94044    | Family                               | 9                 | 2016      | 56                                   |
| 335 Pierce                 | 335 Pierce   | Menlo Park          | San Mateo   | 94025    | Family                               | 4                 | 2016      | 63                                   |
| Alma Point                 | 710 Foster Square Blvd.  | Foster City         | San Mateo   | 94404    | Senior                               | 66                | 2016      | 5                                    |
| Donner Lofts               | 156 E. St. John Street   | San Jose            | Santa Clara | 95112    | SRO                                  | 102               | 2016      | 5                                    |
| Laguna Commons             | 41152 Fremont Blvd.  | Fremont             | Alameda     | 94538    | Family                               | 64                | 2016      | 5                                    |
| Onizuka Crossing           | 620 E. Maude Avenue  | Sunnyvale           | Santa Clara | 94085    | Family                               | 58                | 2016      | 5                                    |
| Half Moon Village II       | 1-6 Bloom Lane   | Half Moon Bay       | San Mateo   | 94019    | Senior                               | 115               | 2015      | 6                                    |
| Aptos Blue                 | 3200 Aptos Rancho Road   | Aptos               | Santa Cruz  | 95003    | Family                               | 40                | 2014      | 8                                    |
| Half Moon Village I        | 801 Arnold Way   | Half Moon Bay       | San Mateo   | 94019    | Senior                               | 45                | 2014      | 7                                    |
| Main Street Park I         | 1101 Main St.  | Half Moon Bay       | San Mateo   | 94019    | Family                               | 36                | 2014      | 7                                    |
| Sharmon Palms Lane         | 964, 952, 949, 961, 975, 989, 739, 751, 775, 844, 858, 870, 886, 898, 910 Sharmon Palms Lane | Campbell            | Santa Clara | 95008    | Family                               | 60                | 2014      | 6                                    |
| Century Village            | 41299 Paseo Parkway  | Fremont             | Alameda     | 94539    | Family                               | 100               | 2013      | 8                                    |
| Delaware Pacific           | 1990 S. Delaware Street  | San Mateo           | San Mateo   | 94403    | Family                               | 60                | 2013      | 8                                    |
| Garland Plaza              | 662 Garland Avenue   | Sunnyvale           | Santa Clara | 94086    | Family                               | 20                | 2013      | 8                                    |
| Manzanita Place            | 17500 Reynolds Street and 17900 Kearny Street  | East Garrison       | Monterey    | 93933    | Family                               | 66                | 2013      | 8                                    |
| Schapiro Knolls            | 33 Minto Road  | Watsonville         | Santa Cruz  | 95076    | Family                               | 88                | 2013      | 8                                    |
| Sunny Meadows              | 200 Ross Avenue  | Freedom             | Santa Cruz  | 95019    | Family                               | 200               | 2013      | 8                                    |
| Woodlands Newell           | 1761 & 1767 Woodland Avenue and 44 & 48 Newell Road  | East Palo Alto      | San Mateo   | 94303    | Family                               | 49                | 2013      | 8                                    |
| 636 El Camino A            | 636 El Camino Real   | South San Francisco | San Mateo   | 94080    | Family                               | 62                | 2012      | 9                                    |
| 636 El Camino B            | 636 El Camino Real   | South San Francisco | San Mateo   | 94080    | Family                               | 47                | 2012      | 9                                    |
| Station Center II          | 34888 11th Street  | Union City          | Alameda     | 94587    | Family                               | 57                | 2012      | 9                                    |
| Cynara Court               | 10860 Merritt Street   | Castroville         | Monterey    | 95012    | Family                               | 58                | 2011      | 10                                   |
| Fair Oaks Plaza            | 690 South Fair Oaks Avenue   | Sunnyvale           | Santa Clara | 94086    | Senior                               | 124               | 2011      | 10                                   |
| Main Street Village        | 3515 Main Street   | Fremont             | Alameda     | 94538    | Family                               | 64                | 2011      | 10                                   |
| Station Center I           | 34888 11th Street  | Union City          | Alameda     | 94587    | Family                               | 100               | 2011      | 10                                   |
| Vista Meadows              | 108 East Park Street   | Hollister           | San Benito  | 95023    | Senior                               | 72                | 2011      | 10                                   |
| Peninsula Station          | 2901 South El Camino Real  | San Mateo           | San Mateo   | 94403    | Family                               | 68                | 2010      | 11                                   |
| Hillsdale Townhouses       | 1626-1656 Hillsdale Ave  | San Jose            | Santa Clara | 95124    | Family                               | 48                | 2009      | 12                                   |
| Marymead                   | 612 E. 17th Street   | Marysville          | Yuba        | 95901    | Family                               | 68                | 2009      | 12                                   |
| DeVries Place              | 163 N. Main St.  | Milpitas            | Santa Clara | 95035    | Senior                               | 103               | 2008      | 13                                   |
| Paulson Park II            | 111 Montebello Avenue  | Mountain View       | Santa Clara | 94043    | Senior                               | 104               | 2008      | 13                                   |
| Parkhurst Terrace          | 100A Parkhurst Circle  | Aptos               | Santa Cruz  | 95003    | Family                               | 68                | 2007      | 14                                   |
| Vineyard Crossings         | 202-265 Tapestry Lane  | American Canyon     | Napa        | 94503    | Family                               | 145               | 2007      | 14                                   |



|                      |  |                     |              |       |               |     |      |    |
|----------------------|--|---------------------|--------------|-------|---------------|-----|------|----|
| Mission Gateway      | 33155 Mission Blvd.                      | Union City          | Alameda      | 94587 | Family        | 121 | 2006 | 15 |
| Moulton Plaza        | 1601 Tenaka Place                        | Sunnyvale           | Santa Clara  | 94087 | Family        | 66  | 2006 | 15 |
| Monte Vista Terrace  | 1101 Grant Road                          | Mountain View       | Santa Clara  | 94040 | Senior        | 150 | 2005 | 16 |
| Timberwood           | 3903 Seven Trees Boulevard               | San Jose            | Santa Clara  | 95111 | Family        | 286 | 2005 | 16 |
| Via del Mar          | 124 West Beach St.                       | Watsonville         | Santa Cruz   | 95076 | Family        | 40  | 2005 | 16 |
| Villas del Paraiso   | 340 A Paraiso Drive                      | Watsonville         | Santa Cruz   | 95076 | Family        | 51  | 2005 | 16 |
| Riverwood Grove      | 2150 Tasman Dr.                          | Santa Clara         | Santa Clara  | 95054 | Family        | 71  | 2003 | 18 |
| Riverwood Place      | 5090 Lick Mill Blvd.                     | Santa Clara         | Santa Clara  | 95054 | SRO           | 148 | 2003 | 18 |
| Tyrella Gardens      | 449 Tyrella Avenue                       | Mountain View       | Santa Clara  | 94043 | Family        | 56  | 2003 | 17 |
| Country Hills        | 124 Rancho Drive                         | San Jose            | Santa Clara  | 95111 | Family        | 152 | 2002 | 19 |
| Homestead Park       | 1601 Tenaka Pl                           | Sunnyvale           | Santa Clara  | 94087 | Family        | 211 | 2002 | 17 |
| Arbor Park           | 899 North King Road                      | San Jose            | Santa Clara  | 95133 | Family        | 75  | 2001 | 20 |
| Avelina              | 221 Bryant Commons                       | Fremont             | Alameda      | 94539 | Senior        | 41  | 2001 | 20 |
| Italian Gardens      | 1525 Almaden Expressway                  | San Jose            | Santa Clara  | 95125 | Family        | 148 | 2001 | 20 |
| Main Street Park II  | 1131 Main St.                            | Half Moon Bay       | San Mateo    | 94019 | Family        | 28  | 2001 | 20 |
| Moonridge II         | 2002 Miramontes Rd.                      | Half Moon Bay       | San Mateo    | 94019 | Family        | 80  | 2001 | 20 |
| Runnymede Gardens    | 2301 Cooley Avenue                       | East Palo Alto      | San Mateo    | 94303 | Senior        | 78  | 2001 | 20 |
| San Andreas          | 295 San Andreas Rd.                      | Watsonville         | Santa Cruz   | 95076 | Family        | 43  | 2001 | 20 |
| San Pedro Commons    | 101 A St.                                | Colma               | San Mateo    | 94014 | Senior        | 74  | 2001 | 20 |
| Tice Oaks            | 2150 Tice Valley Blvd.                   | Walnut Creek        | Contra Costa | 94595 | Senior        | 91  | 2001 | 20 |
| Colma Ridge          | 85 Reiner St.                            | Colma               | San Mateo    | 94014 | Special Needs | 20  | 1999 | 22 |
| Emerald Hill         | 101 Civic Center Drive                   | Scotts Valley       | Santa Cruz   | 95066 | Family        | 46  | 1999 | 22 |
| Willow Greenridge    | 1565 El Camino Real                      | South San Francisco | San Mateo    | 94080 | Family        | 70  | 1999 | 22 |
| Moonridge I          | 2001 Miramontes Rd.                      | Half Moon Bay       | San Mateo    | 94019 | Family        | 80  | 1999 | 22 |
| Oroyson Village      | 43280 Bryant Terrace                     | Fremont             | Alameda      | 94539 | Family        | 60  | 1999 | 22 |
| Palo Alto Gardens    | 650 San Antonio Road                     | Palo Alto           | Santa Clara  | 94306 | Family        | 156 | 1999 | 22 |
| Paulson Park I       | 90 Sierra Vista Avenue                   | Mountain View       | Santa Clara  | 94043 | Senior        | 149 | 1999 | 13 |
| Girasol              | 1710 Alum Rock Road                      | San Jose            | Santa Clara  | 95116 | Senior        | 60  | 1998 | 23 |
| Page Mill Court      | 2700 Ash Street                          | Palo Alto           | Santa Clara  | 94306 | Special Needs | 24  | 1998 | 23 |
| St. Matthew          | 215 E 2nd Ave                            | San Mateo           | San Mateo    | 94401 | SRO           | 56  | 1998 | 23 |
| Jardines del Valle   | 76 Murphy Rd.                            | Watsonville         | Santa Cruz   | 95076 | Family        | 18  | 1997 | 24 |
| Maryce Freelen Place | 2230 Latham Street                       | Mountain View       | Santa Clara  | 94040 | Family        | 74  | 1997 | 11 |
| Pickering Place      | 20 W. Pickering Ave.                     | Fremont             | Alameda      | 94536 | Family        | 43  | 1997 | 24 |
| Shorebreeze          | 460 N. Shoreline Boulevard               | Mountain View       | Santa Clara  | 94043 | Family        | 108 | 1997 | 24 |
| Bay Oaks             | 2400 Gloria Way                          | East Palo Alto      | San Mateo    | 94303 | Family        | 38  | 1996 | 25 |
| Baker Park           | 4748 Campbell Avenue                     | San Jose            | Santa Clara  | 95130 | Family        | 98  | 1995 | 26 |
| Carroll Inn          | 174 Carroll Street                       | Sunnyvale           | Santa Clara  | 94086 | SRO           | 122 | 1994 | 27 |
| Laureola Oaks        | 907 East San Carlos Ave.                 | San Carlos          | San Mateo    | 94070 | Family        | 16  | 1994 | 27 |
| Farm                 | 3210 Cunnison Lane                       | Soquel              | Santa Cruz   | 95073 | Family        | 39  | 1993 | 28 |
| Gintzon Terrace      | 375 Oaktree Drive                        | Mountain View       | Santa Clara  | 94040 | Senior        | 107 | 1993 | 5  |
| Horizons             | 825 Old County Rd                        | Belmont             | San Mateo    | 94002 | Special Needs | 24  | 1993 | 10 |
| Milagro              | 2850 Rose Avenue                         | San Jose            | Santa Clara  | 95127 | Special Needs | 15  | 1993 | 27 |
| Open Doors           | 634 West Parr Avenue                     | Los Gatos           | Santa Clara  | 95030 | Family        | 64  | 1993 | 28 |
| Santa Familia        | 4984 Severance Drive                     | San Jose            | Santa Clara  | 95136 | Family        | 79  | 1993 | 28 |
| Jessie Street        | 314 Jessie St.                           | Santa Cruz          | Santa Cruz   | 95060 | Special Needs | 14  | 1992 | 18 |
| Willow Court         | 1105 & 1141 Willow Road                  | Menlo Park          | San Mateo    | 94025 | Family        | 6   | 1992 | 29 |
| Garden Street        | 1278, 1288, 1290 Garden Street           | East Palo Alto      | San Mateo    | 94303 | Family        | 3   | 1991 | 30 |
| Homeport             | 5030 Union Ave                           | San Jose            | Santa Clara  | 95124 | Special Needs | 15  | 1991 | 30 |
| Dent Commons         | 5363 Dent Avenue                         | San Jose            | Santa Clara  | 95118 | Family        | 23  | 1989 | 32 |
| Fountains            | 2005 San Ramon Avenue                    | Mountain View       | Santa Clara  | 94043 | Senior        | 124 | 1989 | 32 |
| Vivente I            | 2400 Enborg Lane                         | San Jose            | Santa Clara  | 95118 | Special Needs | 29  | 1989 | 32 |
| Los Gatos Four Plex  | 221-227 Nicholson Avenue                 | Los Gatos           | Santa Clara  | 95030 | Senior        | 4   | 1988 | 13 |
| Vivente II           | 5347 Dent Avenue                         | San Jose            | Santa Clara  | 95118 | Special Needs | 29  | 1988 | 33 |
| Gateway              | 1317-1385 Willow Rd                      | Menlo Park          | San Mateo    | 94025 | Family        | 82  | 1987 | 34 |
| Crescent Terrace     | 130 Crescent Avenue                      | Sunnyvale           | Santa Clara  | 94087 | Senior        | 48  | 1986 | 35 |
| Willow Terrace       | 1115, 1121, 1125, 1139, 1143 Willow Road | Menlo Park          | San Mateo    | 94025 | Family        | 31  | 1986 | 26 |
| Le Beaulieu          | 10092 Bianchi Way                        | Cupertino           | Santa Clara  | 95014 | Special Needs | 27  | 1984 | 13 |
| Saratoga Court       | 18855 Cox Avenue                         | Saratoga            | Santa Clara  | 95070 | Senior        | 20  | 1984 | 10 |
| Morse Court          | 825 Morse Avenue                         | Sunnyvale           | Santa Clara  | 94085 | Family        | 35  | 1983 | 16 |
| Redwood Court        | 635 Spruce St                            | Redwood City        | San Mateo    | 94063 | Family        | 27  | 1983 | 16 |
| Sundial              | 224 Grand Ave.                           | South San Francisco | San Mateo    | 94080 | SRO           | 11  | 1983 | 32 |
| Aster Park           | 1059 Reed Ave                            | Sunnyvale           | Santa Clara  | 94086 | Family        | 95  | 1975 | 46 |
| San Veron Park       | 807 San Veron Road                       | Mountain View       | Santa Clara  | 94043 | Family        | 32  | 1970 | 51 |
| Geil Street          | 11300 Geil Street                        | Castroville         | Monterey     | 95012 | Family        | 11  | 1962 | 5  |



## Veterans Affairs Permanent Supportive Housing

### 6. Experience and References

#### **MIDPEN EXECUTIVE TEAM**

##### **MATTHEW O. FRANKLIN, PRESIDENT AND CEO**

Matt Franklin is a nationally recognized leader in the field of affordable housing. He has dedicated his career to producing high-quality affordable housing that improves the lives of low-income working families and seniors while enhancing the economic vitality of the regions where they live. With a unique combination of public and private sector experience, Matt has held senior positions at the federal, state and local levels. These include Deputy Chief of Staff for the U.S. Department of Housing and Urban Development (HUD) under President Clinton; Director of California's Department of Housing and Community Development where he was the lead housing policy advisory to the Governor; and Director for the San Francisco Mayor's Office of Housing where he championed innovative housing programs that have become national models. Matt currently leads MidPen Housing, one of the nation's largest non-profit developers and owners of affordable housing with real estate assets totaling over \$1 billion. In the seven years that Matt has served as President, MidPen's housing production has doubled and new and innovative investors have been secured. As a board member for the National Housing Trust, the Housing Partnership Network, and former board chair for the Non-Profit Housing Association of Northern California, Matt helps drive legislation to advance affordable housing policy and funding. Matt has a Masters in Public Policy from the John F. Kennedy School of Government at Harvard University and a Bachelors in Political Science from Colgate University. He also attended the London School of Economics and Political Sciences.

##### **SHWETHA SUBRAMANIAN, CHIEF REAL ESTATE DEVELOPMENT OFFICER**

Shwetha has a deep passion for leading teams and supporting individuals in their professional growth. In her role as Chief Real Estate Development Officer, Shwetha leads MidPen's 40+ member development team, currently stewarding a pipeline of more than 25 development projects that will produce an additional 3,000 homes over the next five years. Shwetha joined MidPen in November 2022 and was previously with FivePoint Communities as Senior Vice President of Urban Development and Planning. Shwetha has spent more than two decades building her extensive real estate development acumen: At Forest City Ratner Companies, she led large, complex, multi-use urban developments in their New York offices. In her role as Director of Development, she led all vertical development at Pacific Park Brooklyn, overseeing multiple project teams and consulting groups while also coordinating financial modeling, residential marketing and leasing, and property operations and budgeting across Forest City's residential properties in New York. Shwetha also worked as a Design Architect with DeStefano and Partners in Chicago, Illinois. When Shwetha is not busy guiding her teams through the most complex development challenges, you can find her taking a crack at The New York Times' Wordles, Spelling Bees, and Crossword Puzzles. She's a problem solver!

##### **MICK VERGURA, CHIEF FINANCIAL OFFICER**

Mick joined MidPen in February 2019 with over two decades of experience in finance, capital strategy and corporate management for both for-profit and non-profit companies. As Chief Financial



Officer, Mick oversees MidPen's finance, accounting, asset management and legal teams and has the overall responsibility to steward the organization's \$1.5 billion in real estate assets. During his tenure as CFO and Senior Vice President of The Community Builders, Inc., a non-profit affordable housing developer in Boston, Mick developed a passion to bring affordable housing to all. He's excited to continue his mission-driven work here at MidPen.

## **ALICE TALCOTT, VICE PRESIDENT OF HOUSING FINANCE**

Alice provides strategic direction on the funding of MidPen's development and portfolio projects. She has over 20 years of experience in affordable housing development and is an expert in the financing and structuring of rental housing projects. Prior to MidPen, Alice worked for 14 years at Community Economics, where she assisted non-profit developers in the financing and structuring of over 9,000 units of affordable housing in California and Hawaii, including negotiating over \$825 million in investor equity for 90 projects. Her experience also includes six years at the Mayor's Office of Housing in San Francisco. She has been an active advocate on statewide housing issues and has served on the board of the Non-Profit Housing Association of Northern California (NPH). She is a frequent presenter at the Housing California and NPH conferences on housing finance issues. Alice received a B.A. in Political Science from Washington University in St. Louis and a Masters of City Planning from University of California, Berkeley.

## **MIDPEN DEVELOPMENT TEAM**

### **ABIGAIL GOLDWARE, DIRECTOR OF HOUSING DEVELOPMENT**

Abby provides strategic guidance regarding project phasing, resident relocation, and property disposition to the MidPen team. Since joining MidPen in 2008, she has contributed to the development of affordable homes, including 160 units at Half Moon Village in Half Moon Bay and 185 units at Kottinger Gardens in Pleasanton. Through her work on these two projects in particular, Abby has developed an expertise in multi-phased redevelopment projects and understands how to approach resident relocation, plan for phasing, and complete complex transactions with HUD and other public entities. Abby also partnered with the County of San Mateo Housing Department and County of San Mateo Health Plan to pilot the innovative Community Care Settings program at Half Moon Village, providing housing for frail seniors who can live independently with supportive services while creating significant healthcare cost savings. She brings experience working collaboratively with public partners to create and implement new programs that will benefit the property and its residents. Abby holds a B.A. from Clark University in Worcester, Massachusetts. She also attended the London School of Economics and Political Science.

### **CYNTHIA LUZOD, BUSINESS DEVELOPMENT MANAGER**

Cynthia joined MidPen Housing in 2019, bringing broad experience in the nonprofit sector and affordable housing development. As a Business Development Manager at MidPen, Cynthia's role includes responding to request for proposals and qualifications, site acquisitions, building community partnerships, and project management. She has extensive experience working on new construction and rehabilitation projects that serve low-income households and special needs populations. Currently, Cynthia manages two supportive housing projects, one of which is Shores Landing, a first-round Homekey project in Redwood City that provides 93 homes to permanent supportive housing residents. She also manages the predevelopment of VA Menlo Park, a 62-unit new construction project for homeless veterans in Menlo Park. Prior to MidPen, Cynthia worked at BRIDGE Housing Corporation, assisting in the occupied rehabilitation of seven Rental Assistance Demonstration (RAD) developments in San Francisco. Cynthia attended University of California Berkeley where she received a B.A. in Public Health with a minor in City Planning. Relevant Project



## REFERENCES

### Raymond Hodges

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Director of Department of Housing  
264 Harbor Blvd.  
Belmont, CA 94002  
(650) 802-3389  
[rhodges@smchousing.org](mailto:rhodges@smchousing.org)

Recent Experience with MidPen: Shores Landing (permanent supportive housing), Arroyo Green Apartments (affordable family housing), Alma Point at Foster Square (affordable senior housing) and Serenity Senior (affordable senior housing)

### Trudi Ryan

City of Sunnyvale  
Community Development Director  
456 W. Olive. Avenue  
Sunnyvale, CA 94086  
(408) 730-7444  
[tryan@sunnyvale.ca.gov](mailto:tryan@sunnyvale.ca.gov)

Recent Experience with MidPen: Edwina Benner (affordable family housing) and Onizuka Crossing (affordable family housing)

### Lucia Hughes

City of Fremont  
Housing Manager  
39550 Liberty Street  
Fremont, CA 94538  
(510)494-4506  
[lhughes@fremont.gov](mailto:lhughes@fremont.gov)

Recent Experience with MidPen: Stevenson Terrace, Laguna Commons (affordable family housing with large population of HUD-VASH Veterans)



## **Veterans Affairs Permanent Supportive Housing**

### **7. Financial Proforma**



RENT SCHEDULE

Developer: MidPen Housing Corporation  
Project: Veterans Affairs Permanent Supportive Housing

|           | % AREA<br>MEDIAN | NO. OF<br>UNITS | MONTHLY<br>GROSS<br>RENT<br>(2022<br>TCAC<br>Levels*) | MONTHLY<br>UTILITY<br>ALLOWANCE<br>(2022<br>Levels) | MONTHLY<br>NET RENT | TOTAL<br>MONTHLY<br>RENT | GROSS<br>ANNUAL<br>RENT |
|-----------|------------------|-----------------|---|---|---------------------|--------------------------|-------------------------|
| STUDIO    | 30%              | 0               | 978   | (52)  | 926                 | -                        | -                       |
|           | 40%              | 0               | 1,304   | (52)  | 1,252               | -                        | -                       |
|           | 50%              | 0               | 1,631   | (52)  | 1,579               | -                        | -                       |
|           | 60%              | 0               | 1,957   | (52)  | 1,905               | -                        | -                       |
|           | 80%              | 0               | 2,609   | (52)  | 2,557               | -                        | -                       |
| ONE BED   | 30%              | 18              | 1,048   | (63)  | 985                 | 17,730                   | 212,760                 |
|           | 40%              | 3               | 1,398   | (63)  | 1,335               | 4,005                    | 48,060                  |
|           | 50%              | 33              | 1,748   | (63)  | 1,685               | 55,605                   | 667,260                 |
|           | 60%              | 0               | 2,097   | (63)  | 2,034               | -                        | -                       |
|           | 80%              | 0               | 2,796   | (63)  | 2,733               | -                        | -                       |
| TWO BED   | 30%              | 1               | 1,258   | (85)  | 1,173               | 1,173                    | 14,076                  |
|           | 40%              | 1               | 1,677   | (85)  | 1,592               | 1,592                    | 19,104                  |
|           | 50%              | 2               | 2,097   | (85)  | 2,012               | 4,024                    | 48,288                  |
|           | 60%              | 0               | 2,516   | (85)  | 2,431               | -                        | -                       |
|           | 80%              | 0               | 3,355   | (85)  | 3,270               | -                        | -                       |
| THREE BED | 30%              | 1               | 1,453   | (112)   | 1,341               | 1,341                    | 16,092                  |
|           | 40%              | 0               | 1,938   | (112)   | 1,826               | -                        | -                       |
|           | 50%              | 1               | 2,423   | (112)   | 2,311               | 2,311                    | 27,732                  |
|           | 60%              | 0               | 2,907   | (112)   | 2,795               | -                        | -                       |
|           | 80%              | 0               | 3,876   | (112)   | 3,764               | -                        | -                       |
| MANAGER   |                  | 2               |   |   |                     |                          |                         |

|                     |    |  |  |  |        |           |
|---------------------|----|--|--|--|--------|-----------|
| TOTAL HOUSING UNITS | 62 |  |  |  | 87,781 | 1,053,372 |
|---------------------|----|--|--|--|--------|-----------|

|                          |    |     |                |
|--------------------------|----|-----|----------------|
| Units @ or below 30% AMI | 20 | 32% | of total units |
| Units @ or below 40% AMI | 4  | 6%  | of total units |
| Units @ or below 50% AMI | 36 | 58% | of total units |
| Units @ or below 60% AMI | 0  | 0%  | of total units |
| Units @ or below 80% AMI | 0  | 0%  | of total units |

PROJECT BASED VOUCHER ASSUMPTIONS (2022 FMRs)

|                         |         |                  |
|-------------------------|---------|------------------|
|                         |         | total # of units |
| Payment Standard Studio | \$2,156 | 0                |
| Payment Standard 1-bed  | \$2,665 | 28               |
| Payment Standard 2-bed  | \$3,188 | 2                |
| Payment Standard 3-bed  | \$3,912 | 0                |
|                         |         | 30               |

\* Using 2022 TCAC rent levels due to conservative view of year on year TCAC rent escalation



DEVELOPMENT COSTS

Developer: MidPen Housing Corporation  
Project: Veterans Affairs Permanent Supportive Housing

|                             |        |
|-----------------------------|--------|
| Number of Dwelling Units    | 62     |
| Gross Building Area (SF)    | 51,913 |
| Net Rentable Area (SF)      | 35,235 |
| Circulation and Common (SF) | 16,678 |

|   | <u>TOTAL COST</u>        | <u>\$ PER UNIT</u>    | <u>\$ PER SF</u>        | <u>% of TOTAL</u>  |
|---|--------------------------|-----------------------|-------------------------|--------------------|
| LAND COSTS                                    |                          |                       |                         |                    |
| Acquisition including Closing Costs           | <u>7,350,000</u>         | <u>118,548</u>        | <u>\$ 141.58</u>        | 12%                |
| TOTAL LAND COSTS                              | <u><b>7,350,000</b></u>  | <u><b>118,548</b></u> | <u><b>\$ 141.58</b></u> | <b>12%</b>         |
| DIRECT CONSTRUCTION COSTS                     |                          |                       |                         |                    |
| Residential Site Work & Structures            | <u>33,102,297</u>        | <u>533,908</u>        | <u>\$ 637.65</u>        | 56%                |
| Contactor's Overhead & Profit                 | <u>1,453,705</u>         | <u>23,447</u>         | <u>\$ 28.00</u>         | 2%                 |
| General Conditions                            | <u>2,181,812</u>         | <u>35,191</u>         | <u>\$ 42.03</u>         | 4%                 |
| Construction Contingency                      | <u>2,980,757</u>         | <u>48,077</u>         | <u>\$ 57.42</u>         | 5%                 |
| Contractor's Bond & Insurance                 | <u>363,426</u>           | <u>5,862</u>          | <u>\$ 7.00</u>          | 1%                 |
| TOTAL CONSTRUCTION COSTS                      | <u><b>40,081,998</b></u> | <u><b>646,484</b></u> | <u><b>\$ 772.10</b></u> | <b>67%</b>         |
| INDIRECT COSTS                                |                          |                       |                         |                    |
| Local Permits and Impact Fees                 | <u>1,349,597</u>         | <u>21,768</u>         | <u>\$ 26.00</u>         | 2%                 |
| Architectural and Engineering Fees            | <u>821,440</u>           | <u>13,249</u>         | <u>\$ 15.82</u>         | 1%                 |
| Consultants and Professional Services         | <u>1,084,225</u>         | <u>17,488</u>         | <u>\$ 20.89</u>         | 2%                 |
| Developers Fee                                | <u>2,200,000</u>         | <u>35,484</u>         | <u>\$ 42.38</u>         | 4%                 |
| Indirect Construction Costs Contingency       | <u>242,500</u>           | <u>3,911</u>          | <u>\$ 4.67</u>          | 0%                 |
| Relocation                                    | <u>-</u>                 | <u>-</u>              | <u>\$ -</u>             | 0%                 |
| Legal   | <u>190,000</u>           | <u>3,065</u>          | <u>\$ 3.66</u>          | 0%                 |
| TOTAL INDIRECT COSTS                          | <u><b>5,887,762</b></u>  | <u><b>94,964</b></u>  | <u><b>\$ 113.42</b></u> | <b>10%</b>         |
| FINANCING COSTS                               |                          |                       |                         |                    |
| Construction Loan Interest                    | <u>3,727,281</u>         | <u>60,117</u>         | <u>\$ 71.80</u>         | 6%                 |
| Construction Loan Fees/Expenses               | <u>835,603</u>           | <u>13,477</u>         | <u>\$ 16.10</u>         | 1%                 |
| Permanent Loan Fees/Expenses                  | <u>68,564</u>            | <u>1,106</u>          | <u>\$ 1.32</u>          | 0%                 |
| Tax Credit Costs                              | <u>127,420</u>           | <u>2,055</u>          | <u>\$ 2.45</u>          | 0%                 |
| Capitalized Reserves                          | <u>744,052</u>           | <u>12,001</u>         | <u>\$ 14.33</u>         | 1%                 |
| Soft cost contingency                         | <u>433,903</u>           | <u>6,998</u>          | <u>\$ 8.36</u>          | 1%                 |
| TOTAL FINANCING COSTS                         | <u><b>5,936,824</b></u>  | <u><b>95,755</b></u>  | <u><b>\$ 114.36</b></u> | <b>10%</b>         |
| RENT-UP COSTS                                 |                          |                       |                         |                    |
| Marketing /Advertising Expense                | <u>50,000</u>            | <u>806</u>            | <u>\$ 0.96</u>          | 0%                 |
| Common Area Furnishings                       | <u>250,000</u>           | <u>4,032</u>          | <u>\$ 4.82</u>          | 0%                 |
| TOTAL RENT UP/MARKETING COSTS                 | <u><b>300,000</b></u>    | <u><b>4,839</b></u>   | <u><b>\$ 5.78</b></u>   | <b>1%</b>          |
| <b>TOTAL DEVELOPMENT COSTS</b>                | <u><b>59,556,584</b></u> | <u><b>960,590</b></u> | <u><b>1,147</b></u>     | <u><b>100%</b></u> |
| <b>TDC NET OF RECONTRIBUTED DEVELOPER FEE</b> | <u><b>57,356,584</b></u> | <u><b>925,106</b></u> | <u><b>1,105</b></u>     | <u><b>100%</b></u> |



## SOURCES OF FUNDS

Developer: MidPen Housing Corporation

Project: Veterans Affairs Permanent Supportive Housing

|                                   | CONSTRUCTION      | PERMANENT         | STATUS                                    |
|-----------------------------------|-------------------|-------------------|---|
| State, Local, Federal Assistance: |                   |                   |   |
| County AHF                        | 6,000,000         | 6,000,000         | partially committed (\$500,000 committed) |
| VA Land Donation                  | 7,320,000         | 7,320,000         | committed                                 |
| City of Menlo Park BMR Funds      | 2,000,000         | 2,000,000         | anticipated                               |
| SuperNOFA (VHHP)                  | 0                 | 11,120,220        | anticipated                               |
| AHP                               | 1,000,000         | 1,000,000         | anticipated                               |
| Construction Loan                 | 35,971,108        |                   | anticipated                               |
| GP Equity                         | 0                 | 100               | anticipated                               |
| Tax Credit Proceeds               | 4,817,439         | 32,116,263        | anticipated                               |
| Permanent Loan                    |                   | 0                 | anticipated                               |
| <b>Total Sources</b>              | <b>57,108,548</b> | <b>59,556,584</b> |   |
| <b>Total Development Costs</b>    | <b>57,108,548</b> | <b>59,556,584</b> |   |
| <b>GAP(Surplus)</b>               | <b>0</b>          | <b>0</b>          |   |



**OPERATING EXPENSES**

DEVELOPER:

MidPen Housing Corporation

PROJECT:

Veterans Affairs Permanent Supportive Housing

Number of Dwelling Units 62**Annual Residential Operating Expenses**

|                              |                             |          |
|------------------------------|-----------------------------|----------|
| <b>Administrative</b>        | Advertising:                | \$1,543  |
|                              | Legal:                      | \$3,086  |
|                              | Accounting/Audit:           | \$14,245 |
|                              | Communications/IT           | \$17,975 |
|                              | Other: Office/Misc Expenses | \$3,721  |
| <b>Total Administrative:</b> |                             | \$40,570 |

|                   |                          |          |
|-------------------|--------------------------|----------|
| <b>Management</b> | <b>Total Management:</b> | \$56,730 |
|-------------------|--------------------------|----------|

|                  |                         |           |
|------------------|-------------------------|-----------|
| <b>Utilities</b> | Waste Removal           | \$14,457  |
|                  | Gas:                    | \$9,211   |
|                  | Electricity:            | \$22,082  |
|                  | Water/Sewer:            | \$99,212  |
|                  | <b>Total Utilities:</b> | \$144,962 |

|                                |                                       |           |
|--------------------------------|---------------------------------------|-----------|
| <b>Payroll / Payroll Taxes</b> | On-site Manager:                      | \$201,017 |
|                                | Maintenance Personnel:                | \$51,648  |
|                                | Other: Payroll Taxes/Benefits         | \$106,427 |
|                                | <b>Total Payroll / Payroll Taxes:</b> | \$359,092 |

|                  |                         |          |
|------------------|-------------------------|----------|
| <b>Insurance</b> | <b>Total Insurance:</b> | \$34,839 |
|------------------|-------------------------|----------|

|                    |                             |           |
|--------------------|-----------------------------|-----------|
| <b>Maintenance</b> | Painting:                   | \$427     |
|                    | Repairs:                    | \$17,687  |
|                    | Trash Removal:              |           |
|                    | Exterminating:              | \$5,857   |
|                    | Grounds:                    | \$7,505   |
|                    | Elevator:                   | \$13,176  |
|                    | Other: Fire Alarm, Security | \$129,074 |
|                    | <b>Total Maintenance:</b>   | \$173,726 |

|                       |                              |         |
|-----------------------|------------------------------|---------|
| <b>Other Expenses</b> | Other: Misc Tax/License      | \$800   |
|                       | Other: Real Estate Taxes     | \$2,550 |
|                       | Other: Unit Turnover         | \$1,830 |
|                       | Other: Marketing             | \$1,555 |
|                       | <b>Total Other Expenses:</b> | \$6,559 |

**Total Operating Expenses**

|   |           |
|---|-----------|
| <b>Total Annual Residential Operating Expenses:</b> | \$816,478 |
| <b>Total Annual Operating Expenses Per Unit:</b>    | \$13,169  |

|                          |                                     |           |
|--------------------------|-------------------------------------|-----------|
| <b>Resident Services</b> | <b>Total Resident Services Fee:</b> | \$189,720 |
|--------------------------|-------------------------------------|-----------|

**Total Operating Expenses (Including Resident Services)**

|  |             |
|--|-------------|
| <b>Total Annual Residential Operating Expenses (Incl. Resident Services)</b> | \$1,006,198 |
| <b>Total Annual Operating Expenses (Incl. Resident Services) Per Unit:</b>   | \$16,229    |



# Veterans Affairs Permanent Supportive Housing

## 9% TAX CREDIT CALCULATION

County: **SAN MATEO**  
Year: **2023**

### Unadjusted Basis Limits

| Unit Type                      | Basis/Unit   | No. Units | Total                |
|--------------------------------|--------------|-----------|----------------------|
| Studio                         | \$ 532,060   | 0         | \$ -                 |
| One Bdrm                       | \$ 613,460   | 55        | \$ 33,740,300        |
| Two Bdrm                       | \$ 740,000   | 5         | \$ 3,700,000         |
| Three Bdrm                     | \$ 947,200   | 2         | \$ 1,894,400         |
| Four Bdrm                      | \$ 1,055,240 | 0         | \$ -                 |
| <b>Unadjusted Basis Limits</b> |              | <b>62</b> | <b>\$ 39,334,700</b> |

### Adjustment to Basis Limits

| Basis Boosts                                       | Qualified       | Additional % | \$ Adjustment        |
|--|-----------------|--------------|----------------------|
| Prevailing wage                                    | Yes             | 20%          | \$ 7,866,940         |
| Project Labor Agreement                            | No              | 0%           | \$ -                 |
| Structured parking                                 | No              | 0%           | \$ -                 |
| Childcare center                                   | No              | 0%           | \$ -                 |
| 100% Special Needs                                 | Yes             | 2%           | \$ 786,694           |
| 95% of units elevator served                       | Yes             | 0%           | \$ -                 |
| <i>Section 1037-Exceptions to limits</i>           | <b>Subtotal</b> | <b>22%</b>   | <b>OK</b>            |
| Energy and Green Features                          | up to 10%       | <b>3%</b>    | \$ 1,180,041         |
| Seismic or Environmental                           | up to 15%       | <b>0%</b>    | \$ -                 |
| TCAC Highest Resource Area census tract            | No              | 0%           | \$ -                 |
| TCAC High Resource Area census tract               | No              | 0%           | \$ -                 |
| Impact Fees- <i>Don't include waived fees</i>      |                 |              | \$ 661,811           |
| <b>Total Adjusted Threshold Basis Limits</b>       |                 |              | <b>\$ 49,830,186</b> |
| <b>Total Eligible Basis as a % of Basis Limits</b> |                 |              | <b>98.5%</b>         |
| <b>High Cost Test</b>                              |                 |              | <b>OK</b>            |

### Credit and Equity Calculation

|  |                      |
|--|----------------------|
| Total Eligible Basis                                   | \$ 49,104,972        |
| 9% only: excess parking basis reduction per 10327c(10) | \$ -                 |
| TCAC Eligible Basis                                    | \$ 49,104,972        |
| Basis Limit  | \$ 49,830,186        |
| Allowed Basis (lower of the two)                       | \$ 49,104,972        |
| Voluntary Reduction of Basis                           | \$ 21,100,000        |
| Total Requested Unadjusted Eligible Basis              | \$ 28,004,972        |
| <a href="#">DDA or QCT Adjustment- DDA or QCT?</a>     | Yes 130%             |
| Total Adjusted Eligible Basis                          | \$ 36,406,463        |
| Applicable Fraction                                    | 100%                 |
| Qualified Basis  | \$ 36,406,463        |
| Credit Rate  | 9.00%                |
| Annual Federal Credit                                  | \$ 2,500,000         |
| *State Credit Rate- <i>Special Needs Project?</i>      | No 30%               |
| Maximum Total State Credit                             | \$ 10,921,939        |
| State Credits Reduction                                | \$ -                 |
| <b>Total Adjusted State Credits</b>                    | <b>\$ 10,921,939</b> |
| Federal Equity Pay in Rate                             | <b>\$ 0.93</b>       |
| Total Federal Credit Equity                            | \$ 23,250,000        |
| State Credit Pay in Rate                               | <b>\$ 0.80</b>       |
| Total State Credit Equity                              | <b>\$ 8,737,551</b>  |
| Solar Credit Equity (Photovoltaic Credits)             | 128,712              |
| <b>Total Tax Credit Equity Proceeds</b>                | <b>32,116,263</b>    |



30 YEAR CASH FLOW PROJECTION

| DEVELOPER: MidPen Housing Corporation                  |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                 |                 |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|-----------------|
| PROJECT: Veterans Affairs Permanent Supportive Housing |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                 |                 |
|  | Y1             | Y2             | Y3             | Y4             | Y5             | Y6             | Y7             | Y8             | Y9             | Y10            | Y11            | Y12            | Y13            | Y14            | Y15            | Y16            | Y17            | Y18            | Y19            | Y20            | Y21            | Y22            | Y23            | Y24            | Y25            | Y26            | Y27            | Y28            | Y29            | Y30            | 30 Year Total   |                 |
| REVENUE  |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                 |                 |
| Tenant Payments  | \$ 1,053,372   | \$ 1,079,706   | \$ 1,106,699   | \$ 1,134,366   | \$ 1,162,726   | \$ 1,191,794   | \$ 1,221,589   | \$ 1,252,128   | \$ 1,283,431   | \$ 1,315,517   | \$ 1,348,405   | \$ 1,382,115   | \$ 1,416,668   | \$ 1,452,085   | \$ 1,488,387   | \$ 1,525,597   | \$ 1,563,737   | \$ 1,602,830   | \$ 1,642,901   | \$ 1,683,973   | \$ 1,726,073   | \$ 1,769,224   | \$ 1,813,455   | \$ 1,858,791   | \$ 1,905,261   | \$ 1,952,893   | \$ 2,001,715   | \$ 2,051,758   | \$ 2,103,052   | \$ 2,155,628   | \$ 46,245,878   |                 |
| Section B Payments                                     | \$ 334,296     | \$ 342,653     | \$ 351,220     | \$ 360,000     | \$ 369,000     | \$ 378,225     | \$ 387,681     | \$ 397,373     | \$ 407,307     | \$ 417,490     | \$ 427,927     | \$ 438,625     | \$ 449,591     | \$ 460,831     | \$ 472,351     | \$ 484,160     | \$ 496,264     | \$ 508,671     | \$ 521,388     | \$ 534,422     | \$ 547,783     | \$ 561,477     | \$ 575,514     | \$ 589,902     | \$ 604,650     | \$ 619,766     | \$ 635,260     | \$ 651,142     | \$ 667,420     | \$ 684,106     | \$ 14,676,498   |                 |
| Other Revenue  | \$ 3,720       | \$ 3,813       | \$ 3,908       | \$ 4,006       | \$ 4,106       | \$ 4,209       | \$ 4,314       | \$ 4,422       | \$ 4,532       | \$ 4,646       | \$ 4,762       | \$ 4,881       | \$ 5,003       | \$ 5,128       | \$ 5,256       | \$ 5,388       | \$ 5,522       | \$ 5,660       | \$ 5,802       | \$ 5,947       | \$ 6,096       | \$ 6,248       | \$ 6,404       | \$ 6,564       | \$ 6,728       | \$ 6,897       | \$ 7,069       | \$ 7,246       | \$ 7,427       | \$ 7,613       | \$ 163,318      |                 |
| Distributions from Services Reserve                    | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ 8,681       | \$ 28,355      | \$ 49,272      | \$ 71,488      | \$ 95,064      | \$ 120,062     | \$ 146,546     | \$ 174,584     | \$ 694,052      |                 |
| Less Residential Vacancy                               | \$ (73,996)    | \$ (75,846)    | \$ (77,743)    | \$ (79,686)    | \$ (81,678)    | \$ (83,720)    | \$ (85,813)    | \$ (87,959)    | \$ (90,157)    | \$ (92,411)    | \$ (94,722)    | \$ (97,090)    | \$ (99,517)    | \$ (102,005)   | \$ (104,555)   | \$ (107,169)   | \$ (109,848)   | \$ (112,594)   | \$ (115,409)   | \$ (118,294)   | \$ (121,252)   | \$ (124,283)   | \$ (127,390)   | \$ (130,575)   | \$ (133,839)   | \$ (137,185)   | \$ (140,615)   | \$ (144,130)   | \$ (147,734)   | \$ (151,427)   | \$ (3,248,644)  |                 |
| Less Section B Vacancy                                 | \$ (23,401)    | \$ (23,986)    | \$ (24,585)    | \$ (25,200)    | \$ (25,830)    | \$ (26,476)    | \$ (27,138)    | \$ (27,816)    | \$ (28,512)    | \$ (29,224)    | \$ (29,955)    | \$ (30,704)    | \$ (31,471)    | \$ (32,258)    | \$ (33,065)    | \$ (33,891)    | \$ (34,739)    | \$ (35,607)    | \$ (36,497)    | \$ (37,410)    | \$ (38,345)    | \$ (39,303)    | \$ (40,286)    | \$ (41,293)    | \$ (42,325)    | \$ (43,384)    | \$ (44,468)    | \$ (45,580)    | \$ (46,719)    | \$ (47,887)    | \$ (1,027,355)  |                 |
| EFFECTIVE GROSS INCOME                                 | \$ 1,293,991   | \$ 1,326,341   | \$ 1,359,499   | \$ 1,393,487   | \$ 1,428,324   | \$ 1,464,032   | \$ 1,500,633   | \$ 1,538,148   | \$ 1,576,602   | \$ 1,616,017   | \$ 1,656,418   | \$ 1,697,828   | \$ 1,740,274   | \$ 1,783,781   | \$ 1,828,375   | \$ 1,874,085   | \$ 1,920,937   | \$ 1,968,960   | \$ 2,018,184   | \$ 2,068,639   | \$ 2,120,355   | \$ 2,173,364   | \$ 2,226,379   | \$ 2,311,745   | \$ 2,389,747   | \$ 2,470,475   | \$ 2,554,026   | \$ 2,640,497   | \$ 2,729,992   | \$ 2,822,616   | \$ 57,503,747   |                 |
| OPERATING EXPENSES                                     |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                 |                 |
| Replacement Reserves                                   | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (27,900)    | \$ (837,000)    |                 |
| Operating Expenses                                     | \$ (816,478)   | \$ (845,055)   | \$ (874,632)   | \$ (905,244)   | \$ (936,927)   | \$ (969,720)   | \$ (1,003,660) | \$ (1,038,788) | \$ (1,075,146) | \$ (1,112,776) | \$ (1,151,723) | \$ (1,192,033) | \$ (1,233,754) | \$ (1,276,936) | \$ (1,321,628) | \$ (1,367,885) | \$ (1,415,761) | \$ (1,465,313) | \$ (1,516,595) | \$ (1,569,680) | \$ (1,624,619) | \$ (1,681,480) | \$ (1,740,332) | \$ (1,801,244) | \$ (1,864,287) | \$ (1,929,538) | \$ (1,997,071) | \$ (2,066,969) | \$ (2,139,313) | \$ (2,214,189) | \$ (2,291,480)  | \$ (22,148,780) |
| County \$5,000 Fee                                     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (5,000)     | \$ (150,000)    |                 |
| Services Fee   | \$ (189,720)   | \$ (196,360)   | \$ (203,233)   | \$ (210,346)   | \$ (217,708)   | \$ (225,328)   | \$ (233,214)   | \$ (241,377)   | \$ (249,825)   | \$ (258,569)   | \$ (267,619)   | \$ (276,985)   | \$ (286,680)   | \$ (296,714)   | \$ (307,099)   | \$ (317,847)   | \$ (328,972)   | \$ (340,486)   | \$ (352,403)   | \$ (364,737)   | \$ (377,503)   | \$ (390,715)   | \$ (404,390)   | \$ (418,544)   | \$ (433,193)   | \$ (448,355)   | \$ (464,047)   | \$ (480,289)   | \$ (497,099)   | \$ (514,497)   | \$ (9,793,854)  |                 |
| Total Operating Expenses                               | \$ (1,039,098) | \$ (1,074,315) | \$ (1,110,764) | \$ (1,148,490) | \$ (1,187,535) | \$ (1,227,948) | \$ (1,269,774) | \$ (1,313,065) | \$ (1,357,871) | \$ (1,404,245) | \$ (1,452,242) | \$ (1,501,919) | \$ (1,553,334) | \$ (1,606,549) | \$ (1,661,627) | \$ (1,718,633) | \$ (1,777,633) | \$ (1,838,699) | \$ (1,901,902) | \$ (1,967,317) | \$ (2,035,022) | \$ (2,105,096) | \$ (2,177,623) | \$ (2,252,688) | \$ (2,330,381) | \$ (2,410,792) | \$ (2,494,019) | \$ (2,580,158) | \$ (2,669,312) | \$ (2,761,586) | \$ (52,929,635) |                 |
| ANNUAL OPERATING EXPENSES                              | \$ (1,039,098) | \$ (1,074,315) | \$ (1,110,764) | \$ (1,148,490) | \$ (1,187,535) | \$ (1,227,948) | \$ (1,269,774) | \$ (1,313,065) | \$ (1,357,871) | \$ (1,404,245) | \$ (1,452,242) | \$ (1,501,919) | \$ (1,553,334) | \$ (1,606,549) | \$ (1,661,627) | \$ (1,718,633) | \$ (1,777,633) | \$ (1,838,699) | \$ (1,901,902) | \$ (1,967,317) | \$ (2,035,022) | \$ (2,105,096) | \$ (2,177,623) | \$ (2,252,688) | \$ (2,330,381) | \$ (2,410,792) | \$ (2,494,019) | \$ (2,580,158) | \$ (2,669,312) | \$ (2,761,586) | \$ (52,929,635) |                 |
| NET OPERATING INCOME                                   | \$ 254,893     | \$ 252,026     | \$ 248,735     | \$ 244,997     | \$ 240,788     | \$ 236,084     | \$ 230,858     | \$ 225,084     | \$ 218,732     | \$ 211,773     | \$ 204,176     | \$ 195,910     | \$ 186,940     | \$ 177,231     | \$ 166,748     | \$ 155,452     | \$ 143,303     | \$ 130,261     | \$ 116,282     | \$ 101,322     | \$ 85,333      | \$ 68,268      | \$ 58,756      | \$ 59,057      | \$ 59,366      | \$ 59,683      | \$ 60,007      | \$ 60,340      | \$ 60,680      | \$ 61,030      | \$ 4,574,113    |                 |
| Debt Service - Tranche A                               | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -            |                 |
| Debt Service - Tranche B                               | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -            |                 |
| HCD Debt Services Payment                              | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (46,705)    | \$ (1,401,148)  |                 |
| NET ANNUAL CASH FLOW                                   | \$ 208,188     | \$ 205,321     | \$ 202,030     | \$ 198,292     | \$ 194,083     | \$ 189,379     | \$ 184,153     | \$ 178,379     | \$ 172,027     | \$ 165,068     | \$ 157,471     | \$ 149,205     | \$ 140,235     | \$ 130,526     | \$ 120,043     | \$ 108,747     | \$ 96,598      | \$ 83,556      | \$ 69,577      | \$ 54,617      | \$ 38,628      | \$ 21,563      | \$ 12,051      | \$ 12,352      | \$ 12,661      | \$ 12,978      | \$ 13,302      | \$ 13,635      | \$ 13,975      | \$ 14,325      | \$ 3,172,965    |                 |
| USES OF AVAILABLE CASH                                 |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                |                 |                 |
| Deferred Developer Fee                                 | \$ 7,000       | \$ 7,175       | \$ 7,354       | \$ 7,538       | \$ 7,727       | \$ 7,920       | \$ 8,118       | \$ 8,321       | \$ 8,529       | \$ 8,742       | \$ 8,961       | \$ 9,185       | \$ 9,414       | \$ 9,650       | \$ 9,891       | \$ 10,138      | \$ 10,392      | \$ 10,651      | \$ 10,918      | \$ 11,191      | \$ 11,470      | \$ 11,757      | \$ 12,051      | \$ 12,352      | \$ 12,661      | \$ 12,978      | \$ 13,302      | \$ 13,635      | \$ 13,975      | \$ 14,325      | \$ 307,319      |                 |
| Asset Management Fee                                   | \$ 20,000      | \$ 20,500      | \$ 21,013      | \$ 21,538      | \$ 22,076      | \$ 22,628      | \$ 23,194      | \$ 23,774      | \$ 24,368      | \$ 24,977      | \$ 25,602      | \$ 26,242      | \$ 26,898      | \$ 27,570      | \$ 28,259      | \$ 28,964      | \$ 29,686      | \$ 30,424      | \$ 31,178      | \$ 31,948      | \$ 32,734      | \$ 33,536      | \$ 34,354      | \$ 35,188      | \$ 36,038      | \$ 36,904      | \$ 37,786      | \$ 38,684      | \$ 39,598      | \$ 40,528      | \$ 358,639      |                 |
| Partnership Mgmt. Fee                                  | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -           | \$ -            | \$ -            |
| SURPLUS CASH FLOW                                      | \$ 181,188     | \$ 177,646     | \$ 173,663     | \$ 169,216     | \$ 164,281     | \$ 158,831     | \$ 152,842     | \$ 146,284     | \$ 139,130     | \$ 131,348     | \$ 122,909     | \$ 113,778     | \$ 103,923     | \$ 93,306      | \$ 81,893      | \$ 69,609      | \$ 56,207      | \$ 42,905      | \$ 28,660      | \$ 13,626      | \$ -           | \$ -           | \$ 0           | \$ 0           | \$ 0           | \$ 0           | \$ 0           | \$ 0           | \$ 0           | \$ 0           | \$ 0            | \$ 2,507,008    |

|                                  |         |
|----------------------------------|---------|
| Assumptions:                     |         |
| Vacancy                          | 7.0%    |
| Debt Svc Coverage                | 1.15    |
| Permanent Loan Amount: Tranche A | -       |
| Interest Rate:                   | 7.11%   |
| Amortization Term ( months):     | 420     |
| Permanent Loan Amount: Tranche B | -       |
| Interest Rate:                   | 7.11%   |
| Amortization Term ( months):     | 180     |
| Tax Credit Equity Pricing        | \$ 0.93 |
| Out-year calculations:           |         |
| Rental Income                    | 2.50%   |
| Section B Income                 | 2.50%   |
| Operating Exp                    | 3.50%   |
| Fee Escalator                    | 2.50%   |
| Replacement Reserves             | 0.00%   |



City of Menlo Park  
2023 NOFA Application Attachments

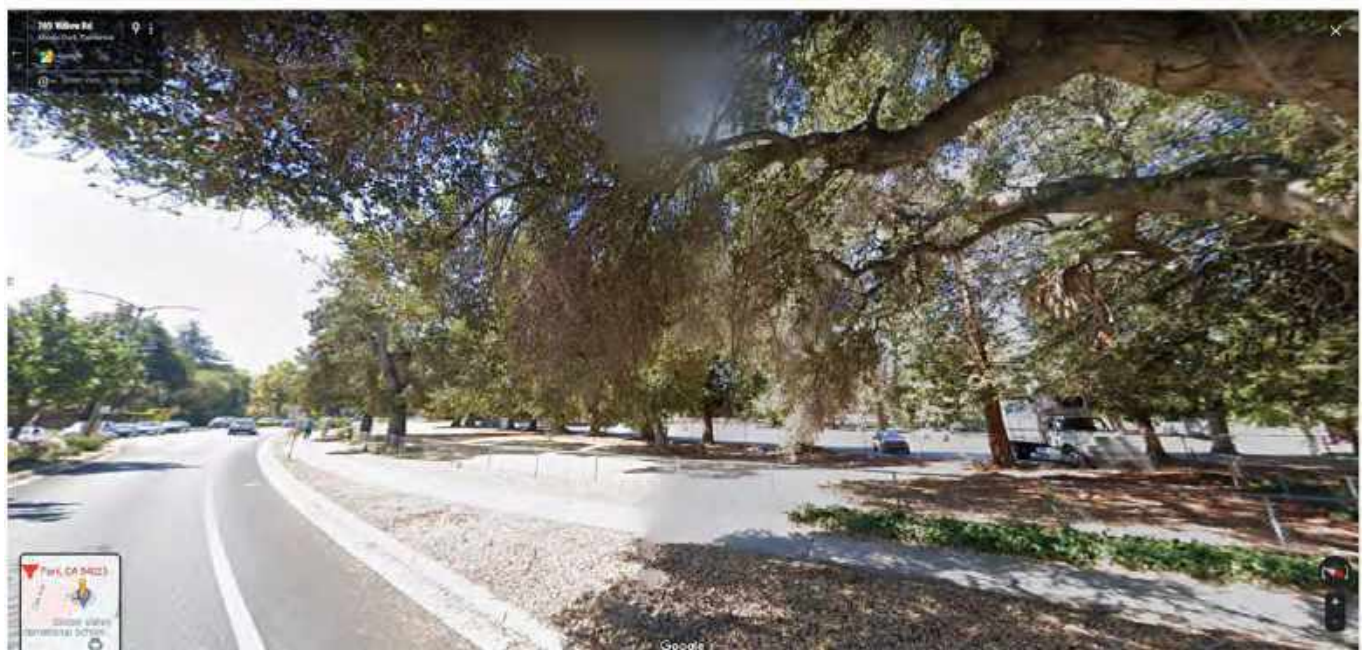
## **Veterans Affairs Permanent Supportive Housing**

### **8. Photos**





North West View of the Proposed Development Site from Willow Road



Westward View of the Proposed Development Site from Willow Road





North View of the Proposed Development Site from Willow Road



View of Willow Road from Site





Aerial View of the Site



**City of Menlo Park**  
**2023 NOFA Application Attachments**

## **Veterans Affairs Permanent Supportive Housing**

### **9. Board of Directors**



**MIDPEN HOUSING CORPORATION  
BOARD MEMBERS  
2023**

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**Beth Bartlett – Director**  
Portola Valley, CA 94028

**Gina Diaz – Secretary**  
San Francisco, CA 94134

**Terry Freeman – Director**  
Woodside, CA 94062

**Fay Sien Goon – Director**  
Saratoga, CA 95070

**Reneé McDonnell – Director**  
San Francisco, CA 94111

**Enrique Torres – Treasurer**  
Danville, CA 94506

**Jennifer Martinez – Director**  
San Mateo, CA 94401

**Jessica Garcia-Kohl – Vice-  
Chairperson**  
San Jose, CA 95112

**Eric Harrison – Chairperson**  
Walnut Creek, CA 94612

**Elisa Jagerson – Director**  
Portola Valley, CA 94078

**Jennifer “Jenny” Hicks - Director**  
Oakland, CA 94603

**Chan U Lee – Director**  
Oakland, CA 94618

**Rob Hollister – Director**  
Woodside, CA 94062



## 2022-23 NOTICE OF FUNDING AVAILABILITY APPLICATION

Community Development – Housing Division  
701 Laurel St., Menlo Park, CA 94025  
tel 650-330-6702

| Project applicant   |  |   |   |
|---|--|---|---|
| Organization/Agency: <b>Rebuilding Together Peninsula</b>   |  |   |   |
| Primary contact person: <b>Joy Dickinson</b>  |  |   |   |
| Phone: <b>650-201-1985</b>  |  | Email: <b>development@rebuildingtogetherpeninsula.org</b> |   |
| Address: <b>841 Kaynyne Street</b>  |  | City: <b>Redwood City</b>                                 | State: <b>CA</b> Zip: <b>94063</b>        |
| <p>1. What is the role of the applicant in the project (check all that apply):</p> <p><input type="checkbox"/> Ownership entity</p> <p><input type="checkbox"/> Managing partner or managing member</p> <p><input type="checkbox"/> Sponsoring organization</p> <p><input type="checkbox"/> Developer</p> <p><input checked="" type="checkbox"/> Other (describe): <b>501c3 nonprofit providing home repairs to low-income homeowners in Menlo Park</b></p> <p>2. Applicant legal status:</p> <p><input type="checkbox"/> General partnership</p> <p><input type="checkbox"/> Joint venture</p> <p><input type="checkbox"/> Limited partnership corporation</p> <p><input checked="" type="checkbox"/> Nonprofit organization</p> <p><input type="checkbox"/> Other (please specify):</p> <p>3. Organization status:</p> <p><input checked="" type="checkbox"/> Currently exists</p> <p><input type="checkbox"/> To be formed (estimated date):</p> <p>4. Name(s) of individuals who are/will be general partner(s) or principal owner(s): <b>repair sites are owned by low-income homeowners</b></p> <p>If the applicant is a joint venture, a joint venture agreement is required that clearly describes the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.</p> |  |   |   |
| Project detail  |  |   |   |
| Project name: <b>Rehabilitation and preservation of homes owned by low-income Menlo Park residents</b>  |  |   |   |
| Project address: <b>see attached project list</b>   |  | City: <b>Menlo Park</b>                                   | State: <b>CA</b> Zip: <b>see attached</b> |
| Assessor's parcel number:   |  |   |   |
| <p>Project type (check all that apply):</p> <p><input checked="" type="checkbox"/> Families</p> <p><input checked="" type="checkbox"/> Seniors</p> <p><input checked="" type="checkbox"/> Special needs</p> <p><input checked="" type="checkbox"/> Other (please describe):</p>   |  |   |   |
| <p>Project activity (check all that apply):</p> <p><input type="checkbox"/> Acquisition</p> <p><input checked="" type="checkbox"/> Rehabilitation</p> <p><input type="checkbox"/> New construction</p> <p><input checked="" type="checkbox"/> Preservation</p> <p><input type="checkbox"/> Mixed-income</p> <p><input type="checkbox"/> Mixed-use</p> <p><input type="checkbox"/> Other (please specify):</p>   |  |   |   |
| Land area: <b>City of Menlo Park - 8 residential lots</b>   |  | Number of residential buildings: <b>8</b>                 |   |



|  |  |      |          |          |          |                     |      |            |            |            |
|--|--|------|----------|----------|----------|---------------------|------|------------|------------|------------|
| Number of units: <b>8 homes owned by low-income persons</b>  | Residential total floor area: <b>see attached list</b> |      |          |          |          |                     |      |            |            |            |
| Number of stories: <b>single story homes</b>   | Number of elevators: none                              |      |          |          |          |                     |      |            |            |            |
| Number of community rooms: n/a   | Community room(s) total floor area: n/a                |      |          |          |          |                     |      |            |            |            |
| Commercial/office uses (please specify):<br>n/a  |  |      |          |          |          |                     |      |            |            |            |
| Commercial total floor area: n/a   | Office total floor area: n/a                           |      |          |          |          |                     |      |            |            |            |
| Other uses (please specify): n/a   |  |      |          |          |          |                     |      |            |            |            |
| Total parking spaces: n/a  | Parking type(s): n/a                                   |      |          |          |          |                     |      |            |            |            |
| Residential parking spaces: <b>see attached list</b>   | Residential parking ratio: n/a                         |      |          |          |          |                     |      |            |            |            |
| Guest parking spaces: <b>street parking</b>  |  |      |          |          |          |                     |      |            |            |            |
| Commercial parking spaces: n/a   | Commercial parking ratio: n/a                          |      |          |          |          |                     |      |            |            |            |
| Office parking spaces: n/a   | Office parking ratio: n/a                              |      |          |          |          |                     |      |            |            |            |
| <b>Income categories *</b>   |  |      |          |          |          |                     |      |            |            |            |
| City BMR funds may only fund units serving extremely low, very low or low income households at or below 80% of the area median income (AMI). Inclusions of units for homeless households are encouraged. |  |      |          |          |          |                     |      |            |            |            |
| Category   | Number of units  |      |          |          |          | Percentage of units |      |            |            |            |
|  | Studio   | 1 bd | 2 bd     | 3 bd     | 4 bd     | Studio              | 1 bd | 2 bd       | 3 bd       | 4 bd       |
| 0 to 30% AMI – Extremely low   |  |      | <b>2</b> | <b>2</b> | <b>1</b> |                     |      | <b>25%</b> | <b>25%</b> | <b>12%</b> |
| 31 to 50% AMI – Very low   |  |      |          | <b>2</b> |          |                     |      |            | <b>25%</b> |            |
| 51 to 80% AMI – Low  |  |      |          | <b>1</b> |          |                     |      |            | <b>12%</b> |            |
| 81 to 120% AMI – Moderate  |  |      |          |          |          |                     |      |            |            |            |
| Unrestricted   |  |      |          |          |          |                     |      |            |            |            |
| TOTAL  |  |      |          |          |          |                     |      |            |            |            |
| * estimated based on previous City of Menlo Park applicants to our minor home repair program funded by the County  |  |      |          |          |          |                     |      |            |            |            |
| What is your existing total BMR obligation by unit type? <b>Not applicable</b>   |  |      |          |          |          |                     |      |            |            |            |
| Category   | Number of units  |      |          |          |          | Percentage of units |      |            |            |            |
|  | Studio   | 1 bd | 2 bd     | 3 bd     | 4 bd     | Studio              | 1 bd | 2 bd       | 3 bd       | 4 bd       |
| BMR Obligation   |  |      |          |          |          |                     |      |            |            |            |



|   |
|---|
| <b>Unit amenities</b>   |
| <p>Provide a brief list of unit amenities (e.g., air conditioning, laundry in unit, balconies, etc.):</p> <p><b>Not applicable, this program will not repair apartments but single family homes. Each home has typical amenities for single family homes, washer/dryer hookups, yards, garages, etc.</b></p>  |
| <b>Project narrative (please attach any additional responses)</b>   |
| <p>1. Project description: Provide a brief narrative summary of the proposed project including location, project type (e.g., new versus rehab), target population and any unique project characteristics.</p> <p><b>Rebuilding Together Peninsula (RTP) seeks funds from the City of Menlo Park to rehabilitate the homes of eight low-income homeowners in Menlo Park. This will aid in the preservation of the City's affordable housing stock by repairing the homes owned by low-income Menlo Park residents, preventing displacement and gentrification. RTP's free home repair program will enable Menlo Park's low-income, primarily elderly residents to age-in-place and pass a safe, affordable home down to the next generation.</b></p> |
| <p>2. Project design: Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.</p> <p><b>This is not applicable. The rehabilitation to be performed on each home does not require architectural plans or site plans. The category of repairs for each home are listed in the attached project descriptions.</b></p>   |
| <p>3. Green building features: Describe the green building features that will be incorporated into the project.</p> <p><b>Based on the needs of each home, we will install energy saving materials (e.g. LED light fixtures and double paned windows).</b></p>  |
| <p>4. On-site amenities: Describe any on-site amenities including any project characteristics that address the special needs of the population you intend to serve.</p> <p><b>This project will rehabilitate single family homes owned by low-income Menlo Park residents so they can be preserved as part of the City's affordable housing stock. One of the main "on-site amenities" that we will add are grab bars, handrails and trip-resistant flooring so that elderly, low-income homeowners can age-in-place.</b></p>   |
| <p>5. Neighborhood off-site amenities: Describe the property location, neighborhood transportation options, and local services and amenities that are within 1/4 mile and 1/2 mile of the site.</p> <p><b>The 8 proposed homes are located in the Belle Haven neighborhood of Menlo Park, specifically on the streets of Madera, Ivy, Sevier, Carlton and Hollyburn. Neighborhood amenities include Belle Haven School, Cesar Chavez Ravenswood Middle School, child care agencies, churches, restaurants, and public transportation (Bus stops are located on the corners of Carlton and Newbridge (near Madera Ave); Hollyburn and Newbridge; and Ivy and Sevier.</b></p>   |



6. Potential development obstacles: Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below including an outline of steps that will be taken and the time needed to resolve these issues.

**While construction delays have been common over the last two years, it seems that the supply chain issues of the pandemic are subsiding. That said, we do not foresee any significant delays or obstacles. RTP has over 30 years of experience in navigating home repair on the Peninsula. We hold a general contractors license and we are in good standing with every city and the county. We understand the permitting processes and have a trusted bank of 100+ subcontractors.**

**Site information (please attach any additional responses)**

Site control is required. Evidence should also be submitted demonstrating that the entity that has site control is the same entity applying for funds. Please include the site control document with the application. **attached**

What type of site control does the applicant currently hold? **Each home is owned by the low-income homeowner. Proof is required before work commences.**

Will site acquisition be a purchase or long-term lease? **homes are owned by the low-income homeowner**

What is the purchase price of the land? For proposed leaseholds, indicate the amount of the annual lease payment and the basis for determining that amount: **n/a - RTP will not purchase these homes. They are owned by low-income Menlo Park residents.**

What is the current County-assessed value of the site? **varies - see attached project descriptions**

Who is the current property owner and what is their address and contact information? **See attached project descriptions**

Total square footage of site: **varies - see attached project descriptions**

Existing uses on the site and the approximate square footage of all structures:

**All 8 homes are single story residential homes ranging from 910 to 1500 square feet. See attached project descriptions for details on each home.**

Planned use of on-site existing structures:

- ☐ Demolish  
☒ Rehabilitate  
☐ Other (describe):

Provide the square footage, date built and number of stories for each on-site building to be retained as part of this project:

**Homes were built between 1947 and 1955 and range from 910 to 1500 square feet. See attached project descriptions for details on each home.**

Provide a brief description of the condition of any buildings to be rehabilitated:

**Each of the 8 homes need a number of repairs in order to be safe and healthy, on the attached list the categories of repairs for each home are provided. For example, one home needs a driveway repaired, several need tree trimming and electrical work. Most need flooring repairs or replacement, as well as safety modifications and mobility modifications.**



Describe unique site features (heritage trees, parcel shape, etc.)

**No unique features. All single family home lots ranging from 5227 to 5967 square feet.**

Identify problem site conditions (high noise levels, ingress/egress issues, etc.)

**not applicable**

### **Floodplain**

Is the site in a floodplain? ☐ Yes ☐ No **varies, see attached project descriptions**

If yes, type of flood plain and number of years: **varies, see attached project descriptions**

List any maps referenced:

**FEMA Flood Map Service Center**

### **Describe adjoining land uses**

West: **residential**

East: **residential**

North: **residential**

South: **residential**

### **Zoning**

What is the current zoning of the project site? **residential**

Is the proposed project consistent with the existing zoning of the site? ☒ Yes ☐ No

Explain:

**all 8 sites are zoned residential and are single family homes and will remain that way after repairs are completed.**

Indicate any discretionary review permits required for the project (e.g., planned community permits, design review permits, rezoning, etc.)

**not applicable**



|  |  |
|--|--|
| If rezoning is required identify the requested zoning district for the project: not applicable   |  |
| <b>Community priorities (please attach any additional responses)</b>   |  |
| <p>Explain how this project meets the objectives of the project priorities identified in this NOFA and the goals and objectives of the <u>City's Housing Element and General Plan</u>:</p> <p><b>The City's 2015-2023 Housing Element plan has four main goals. This project, to rehabilitate the homes owned by eight low-income Menlo Park residents, aligns with the plan's goal H2 to "maintain, protect, and enhance existing housing" and its policies H2.1 "Maintenance, Improvement and Rehabilitation of Existing Housing. Encourage the maintenance, improvement, and rehabilitation of the City's existing housing stock, the preservation of the City's affordable housing stock..." and H2.5 "Maintenance and Management of Quality Housing and Neighborhoods. Encourage good management practices, rehabilitation of viable older housing, and long-term maintenance and improvement of neighborhoods." and program H2.D "Assist in Implementing Housing Rehabilitation Programs. Continue to target Belle Haven as a primary area for rehabilitation to prevent existing standard units, both single family and apartments, from becoming deteriorated and to significantly reduce the number of seriously deteriorated units."</b></p> |  |
| <b>Project funding (please attach any additional responses)</b>  |  |
| City funds requested: <b>\$180,000</b>   | Funds per assisted unit: <b>\$22,500</b> |
| Total project cost: <b>\$180,000</b>   | Cost per assisted unit: <b>\$22,500</b>  |
| How will the requested City funding be used? <b>Home rehabilitation for 8 low-income homeowners in Menlo Park</b>  |  |
| <p>Assess the chances of the project securing required funding and steps that will be taken to make the project competitive.</p> <p><b>Upon funding from the City of Menlo Park, this project will be a success. RTP currently has eight low-income homeowners that have applied for repairs to their home. The only thing prohibiting repairs is the funds to do so. RTP holds CDBG contracts with seven jurisdictions, including the County of San Mateo, however, CDBG funds often only cover a fraction of the repairs needed at a home. In addition, site approval has been delayed this year due to new review processes required by HUD. This has resulted in these eight homes waiting for repairs. This project is "ready to go" as soon as funding is secured from the City of Menlo Park.</b></p>   |  |
| OPTIONAL: What is the self-scored 9% tax credit tiebreaker score for the project? (Please note that you may be required to provide this during the application review) <b>N/A</b>  |  |
| <b>Developer experience (please attach any additional responses)</b>   |  |
| <p>Applicants may be nonprofit or for-profit affordable housing developers or owners who have affordable housing experience in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda and Santa Clara) and a successful track record of at least two years of ownership of at least two affordable, deed-restricted housing projects within the nine-county Bay Area in which 100% of the units, are targeted to those at or below 80% AMI. Joint venture partnerships are allowed assuming at least one member of the partnership meets the minimum experience requirement. Previous development/ownership experience must include projects that contain at least 10 units.</p>   |  |
| Years of experience: <b>34 years</b>   |  |
| Number of projects: <b>3500</b>  |  |
| Number of projects in San Mateo County: <b>3000 homes and 500 community facilities have been repaired in 34 years</b>  |  |
| Average size of projects: <b>\$20,000 per site in staff, materials, sub contractors and administration costs.</b>  |  |
| Number of units placed in service: <b>3000 homes preserved as affordable housing for their low-income owners</b>   |  |



|   |                                     |
|---|-------------------------------------|
| Please describe two projects completed in the last 10 years that are similar to the proposed project and provide photographs of each project: |                                     |
| <b>Project 1 – Project name:</b>  | Fortier Household                   |
| Location:   |                                     |
| Number of units:  | 1                                   |
| Type of development (senior, family, etc.):   | single family home                  |
| Name of project manager:  | Greg Bernard                        |
| Number of stories:  | 1                                   |
| Unit types (studio, 1 bedroom, etc.):   | 4 bedroom home, 1270 square feet    |
| Type of construction:   | repairs                             |
| Project amenities:  | not applicable                      |
| Entitlement date:   | not applicable                      |
| Occupancy date:   | not applicable                      |
| Funding sources:  | Lowes                               |
| <b>Project 2 – Project name:</b>  | Irving Household                    |
| Location:   |                                     |
| Number of units:  | 1                                   |
| Type of development (senior, family, etc.):   | single family home                  |
| Name of project manager:  | Greg Bernard                        |
| Number of stories:  | 2                                   |
| Unit types (studio, 1 bedroom, etc.):   | 3 bedroom, 1 bath, 1170 square feet |
| Type of construction:   | rehabilitation                      |
| Project amenities:  | not applicable                      |
| Entitlement date:   | not applicable                      |
| Occupancy date:   | not applicable                      |
| Funding sources:  | Lowes                               |

Repairs at the Whittier property: At Ms. Fortier's home RTP cleared overgrown landscaping, removed debris, created a level path, repaired a fence, repaired a set of stairs, installed a handrail, and set up outdoor furniture and fire pit in her backyard. Now this elderly, low-income, Black woman can safely enjoy her home for years to come.

Repairs at the Morton property: At Ms. Irving's home, RTP painted the exterior of her home, installed a new garage door opener, trimmed trees in the back of her house and replaced window screens around house. Ms. Irving is low-income, elderly, multiethnic, and disabled. She now has a home she can be proud of, she is able to open windows to get fresh air and safely get in and out of her garage.

Photos are attached



| Personnel  |                      |  |   |                           |
|--|----------------------|--|---|---------------------------|
| List the names of key members of the applicant's development team, their titles, responsibilities and years of experience in affordable housing.   |                      |  |   |                           |
| Project Staff  | Name                 | Role in proposed project                           | Years of housing development experience | Years with this developer |
| Project manager  | <b>Greg Bernard</b>  | <b>Director of Programs and General Contractor</b> | <b>20+</b>                              | <b>5</b>                  |
| Director of real estate development  | <b>n/a</b>           |  |   |                           |
| Executive director   | <b>Melissa Lukin</b> | <b>Executive Leadership</b>                        | <b>20+</b>                              | <b>4+</b>                 |
| Chief financial officer  | <b>Jan Sager</b>     | <b>Sr. Accountant</b>                              | <b>20+</b>                              | <b>20+</b>                |
| Other  |                      |  |   |                           |
| Other  |                      |  |   |                           |
| Indicate which of the following development team members have been selected and identify them if different from applicant.   |                      |  |   |                           |
| Developer: n/a   |                      | Architect(s): n/a                                  |   |                           |
| Engineer(s): n/a   |                      | General contractor: n/a                            |   |                           |
| Attorney(s) and/or tax professionals n/a   |                      |  |   |                           |
| Property management agent n/a  |                      |  |   |                           |
| Financial and other consultant(s) n/a  |                      |  |   |                           |
| Investor(s): n/a   |                      |  |   |                           |
| List all other participants and affiliates (people, businesses and organizations) proposing to participate in the project.   |                      |  |   |                           |
| Name   |                      | Address  |   |                           |
| n/a  |                      |  |   |                           |
|  |                      |  |   |                           |
|  |                      |  |   |                           |
|  |                      |  |   |                           |
|  |                      |  |   |                           |
| Describe how the property will be managed including the number of staff, locations and management office hours.  |                      |  |   |                           |
| Not applicable. Each property is privately owned and managed by a low-income homeowner.  |                      |  |   |                           |
| If the project will be managed by an agency other than the project applicant describe the project applicant's role in the ongoing management of the project and resolution of management issues. |                      |  |   |                           |
| n/a  |                      |  |   |                           |



**Applicant certification**

I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and or information herein are found to be misrepresented it shall constitute grounds for disqualification of my proposal. I further certify that the following statements are true except if I have indicated otherwise on this certification:

- ☒ I have not sold any of the projects listed on the 10 Year Projects list
- ☒ No mortgage on a project listed by me has ever been in default
- ☒ Government, or foreclosed, nor has mortgage relief by the mortgagee been given
- ☒ I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low Income Housing Tax Credit (LIHTC) project on the 10 Year Projects list
- ☒ To the best of my knowledge there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past 10 years
- ☒ I have not been suspended, been barred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs
- ☒ I have not failed to use state funds or LIHTC allocated to me in any state

I have checked each deletion, if any, and have attached a true and accurate signed statement, if applicable; to explain the facts and circumstances that I think help to qualify me as a responsible principal for participation in this NOFA.



01/25/2023

Signature

Date

Melissa Lukin

Executive Director

Printed name

Title

This application and all supporting material are regarded as public records under the California Public Records Act.



### **Applicant supporting material**

In addition to submitting a complete application, the following additional supporting material must be provided with the application:

1. Cover letter: Provide a brief summary of the proposed project and discuss your agency's qualifications and why your proposal should be selected for funding.
2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.
3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.
4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.
5. Experience (owner/developer and property manager): Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.
6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.
7. Financial proforma: Please provide detailed financial information for the proposed project including permanent and construction fund sources, detailed permanent development budget, unit affordability mix/rent schedule, operating budget and 30-year cash flow. If the project will use tax credits, please provide the tax credit calculations.
8. Photos: Attach recent clearly labeled photos of the project site and surrounding area.
9. Board of directors: Provide a listing of the board of directors including the city of residence.





January 25, 2023

City of Menlo Park  
Community development - Housing Division  
701 Laurel Street  
Menlo Park, CA 94025

To Whom it May Concern:

**Summary of the proposed project:** Rebuilding Together Peninsula (RTP) proposes to preserve affordable housing in Menlo Park by providing no cost rehabilitation and repairs to eight low-income homeowners over the next year. By preserving our affordable housing stock we prevent displacement of vulnerable populations and reduce gentrification in the community. RTP's no cost repair programs address core issues that put low-income homeowners at risk of losing their homes due to leaky roofs, faulty electrical systems, extensive mold and more.

This project is aligned with the City of Menlo Parks' 2015-2023 Housing Element and its goal H2 to "maintain, protect, and enhance existing housing." Its policies H2.1 "Maintenance, Improvement and Rehabilitation of Existing Housing" and H2.5 "Maintenance and Management of Quality Housing and Neighborhoods." And program H2.D "Assist in Implementing Housing Rehabilitation Programs."

**Agency's qualifications and why your proposal should be selected for funding:** RTP's mission is to repair homes, revitalize communities, and rebuild lives. Our work preserves affordable housing by bringing together skilled staff, trusted subcontractors, and volunteers to address critical health and safety-related repairs for vulnerable, low-income homeowners. As such, we bring hope, dignity and build intergenerational housing equity to low-income families who might otherwise become displaced.

Since 1989, with the help of approximately 2000 volunteers each year, RTP has repaired over 3,500 homes and community centers throughout San Mateo County and Northern Santa Clara County. These repairs are valued at more than \$45 million in donated time and materials. RTP relies on its nearly 35 years of experience effectively working with some of San Mateo County's most vulnerable residents to preserve existing affordable housing, stabilize families living on the edge financially, address critical health and safety needs, and revitalize communities. RTP is led by Melissa Lukin, Executive Director, who has over twenty years of experience working on behalf of marginalized populations on the Peninsula and Greg Bernard, Director of Programs, a general contractor with over twenty years of experience with the Peninsula's aging housing stock.

In Menlo Park, RTP has repaired 101 homes and 19 community facilities since 2010. Right now, we have 8 low-income homeowners waiting for repairs.

Enclosed is the full application and attachments requested by the City's NOFA. Please contact me at 650-366-6597 or [Melissa@RebuildingTogetherPeninsula.org](mailto:Melissa@RebuildingTogetherPeninsula.org) if you have any questions.

In partnership,

A handwritten signature in blue ink that reads "Melissa". To the right of the signature is a blue ink checkmark.

Melissa Lukin, MBA, Executive Director

**Repairing Homes. Revitalizing Communities. Rebuilding Lives.**



**2. Community outreach plan: Include the plan for conducting community outreach to neighbors of the proposed development and interested community groups. The outreach plan should describe how the developer intends to build support for the project and address community concerns. The outreach plan should also discuss any anticipated community concerns and how they would be handled.**

In order to inform low-income homeowners about our free repair programs, RTP conducts grassroots outreach including door-to-door outreach; direct mail; distributing information to nonprofit and government agencies; participating in community events; social media campaigns; and presentations at local senior centers, churches, and other groups.

RTP is trusted by our neighbors in need. Our staff guides homeowners through the application and home repair process, providing multilingual and culturally competent support. We hold our general contractor's license and are experts in navigating building code and permitting processes, thereby reducing barriers for low-income, often monolingual, homeowners.

Before work commences at a specific home, neighbors are notified if the repairs will impact them (e.g. utilities being shut off temporarily, road closures, repairs planned for shared structures).

**3. Site control documents: Site control is required. Please include the site control document as well as documentation demonstrating that the entity that has site control is the same entity applying for funds.**

RTP requires that the owner of the home is low-income and provides proof of income and proof of ownership before work commences. Attached you will find site control documentation for all eight homes.

**4. Development schedule: Include a detailed project schedule identifying all major milestones. The schedule must include major milestones for the development approval process such as purchase of the property, community outreach process, financing, applications, approvals, closings, project construction and lease up. Projects with schedules projecting completion within three years will be given priority.**

During this grant period, RTP will rehabilitate 8 homes in Menlo Park that are currently owned by low-income residents, thus preserving the City's affordable housing stock. Each home will receive 5 services over a 3 month period:

- (1) Homeowner submits an application and it is reviewed by RTP staff. (Done)
- (2) Staff conduct a comprehensive Home Safety Assessment which assesses the repairs needed.
- (3) Staff develop a Home Safety Plan (aka scope of work) which details how the repairs will be completed.
- (4) Repairs and home safety modifications are completed by our experienced repair technicians and trusted subcontractors.
- (5) Staff review the project and collect feedback through surveys to assess the impact of our work on the homeowner.

**Purchase of the property:** not applicable. Homes are owned by low-income families in Menlo Park.



**Community Outreach:** RTP conducts community outreach on an ongoing basis. We are actively working with nonprofit organizations, government agencies and using social media and direct mail to let residents and community organizations know about our free home repair programs. Prior to construction at a home, we inform the neighbors if the construction will impact their property (e.g. shared fence line, driveway access).

**Financing:** not applicable. RTP does not charge homeowners for the repairs and does not take out loans to provide repairs.

**Applications:** homeowners submit applications for repairs to RTP on an ongoing basis. Approximately 200 applications are received each year. As of the writing of this proposal, eight Menlo Park low-income homeowners have approved applications with RTP and are waiting for repairs.

**Approvals:** Prior to work commencing the City of Menlo Park may choose to review and approve applications and scopes of work for the eight repair sites. Any permits necessary will be obtained before work commences.

**Closings:** not applicable.

**Project Construction:** Project Construction timeline depends on the scope of work for each home. Typically the five steps outlined above are completed within 3 months.

**Lease up:** Not applicable.

**5. Experience (owner/developer and property manager):** Please provide resumes for the owner/developer and property manager. The resume should include a list of affordable housing projects owned/developed and managed. Please include the following: name of project, address, number of units, target population, project PIS date and years under ownership/management.

Attached are the resumes of our Executive Director, Melissa Lukin and Director of Programs, Greg Bernard. RTP does not own or manage any affordable housing projects. We preserve the Peninsula's current affordable housing stock by providing critical health and safety repairs to the homes owned by low-income people.

Below are three recent homeowners that are willing to be contacted as references:

**#1 Susan Senning**

Date Carried Out: June 2022

Funding sources: City of San Mateo CDBG

# of housing units: 1

Description of work: remove and replace carpet, remove and replace vinyl flooring, replace baseboards, weatherstrip front door

**#2 Scott Benson**



Date Carried Out: May 2022

Funding sources: County of San Mateo CDBG

# of housing units: 1

Description of work: yard clean up, house painting, fence repair, lighting repair, closet door repair, transition strips on threshold replacement, landscaping and safety modifications (smoke detectors, etc.)

**#3 Kevin Cooke**

Date Carried Out: March 2022

Funding sources: County of San Mateo CDBG

# of housing units: 1

Description of work: replace flooring in laundry room and kitchen, replace lighting, replace garbage disposal, caulk sink, fix hallway bathroom shower and toilet, repair bedroom door, fix subfloor in master bathroom



**6. Experience and references (staff): Provide resumes and project experience for all key staff working on the project including but not limited to: principals, project manager, project staff and financial officer. Indicate the level of experience of the project manager with projects similar to the proposal. Provide at least three references from City or County staff involved with projects completed in the last six years.**

Resumes attached, brief review of duties and qualifications are below:

| Position Title       | Name           | Job duties   | Qualifications  |
|----------------------|----------------|--|---|
| Executive Director   | Melissa Lukin  | Principal on the project, responsible for oversight of the project in terms of fiscal compliance, contract compliance and alignment with RTP's mission. Reports to a board of directors    | 30 years of experience supporting traditionally underserved communities. Most recently, Melissa served for 15 years as the Executive Director of San Mateo County's only domestic violence services agency, CORA, which operates transitional housing and emergency shelter programs. Prior to that, she provided training and consulting on nonprofit, governance-related issues to local nonprofit boards. Melissa holds a B.A. from Brown University and an M.B.A. from Boston University. |
| Director of Programs | Greg Bernard   | Main responsibilities are to preview each applicant's home, create a scope of work for them and oversee project management   | General Contractor's License #986653, OSHA and RRP Certified, 20+ years' experience as a contractor, 5+ years' experience in CDBG program management with San Mateo County and the Cities of Daly City, Redwood City, South San Francisco, San Mateo and Mountain View. Bachelors in Electrical Engineering, Master's degree in Computer Engineering.   |
| Safe at Home Manager | Shauna Barbera | Manages client and vendor interaction for repair projects. Serves as the external 'face' of the organization with support of staff in the background to complete work at SAH repair sites. | Joined RTP in 2022 to manage the Sequoia Mobile Home Trailer Park renovation project, an innovative public/private partnership. Was promoted to Safe at Home Manager in 2023. Shauna holds more than 10 years of experience in operations management and project engineering. is an expert at managing project details including subcontractors. Holds a bachelors' degree in Psychology.   |



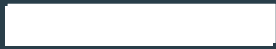
|                                 |                     |  |  |
|---------------------------------|---------------------|--|--|
| Outreach and Intake Coordinator | Esmeralda Rodriguez | Supports repair programs by working with homeowners to complete their applications, scheduling previews, and conducting homeowner survey | 12 years of nonprofit experience serving vulnerable populations. Holds a bachelor's degree in Psychology. Bilingual English/Spanish.   |
| Financial officer               | Jan Sager           | Provides accounting services for the organization, including billing, accounts payable, payroll, financial reporting and more.           | Over 35 years of experience in financial services including serving as a paralegal, Director of Operations for a software company, and since 1999, Ms. Sager has served as an Accounting Consultant for over 10 nonprofit organizations. Bachelor's degree in Psychology and classes from UC Berkeley in accounting. |

**City and County Staff References:**

- Betsy Zobell, Housing and Community Development Supervisor, City of Daly City, Phone: 650-991-8255. Email: [bzobell@dalycity.org](mailto:bzobell@dalycity.org)
- Nicholas VŨ, MPL, Housing Specialist, Community Development Department, Housing Division, City of San Mateo. Phone: 650-522-7229. Email: [nvu@cityofsanmateo.org](mailto:nvu@cityofsanmateo.org)
- Alin Lancaster, Housing Leadership Manager, City of Redwood City, Phone: (650) 780-7299, Email: [alancaster@redwoodcity.org](mailto:alancaster@redwoodcity.org)



## Contact



(LinkedIn)

## Top Skills

Community Outreach

Grant Writing

Event Planning

## Languages

Spanish

## Honors-Awards

Woman of the Year, 22nd Assembly  
District, CA

## Publications

What the Sheriff Could Have Said

Taking a Knee for DV

# Melissa Lukin

Executive Director, Rebuilding Together Peninsula  
San Francisco Bay Area

## Summary

Particularly talented at fundraising, building consensus, public speaking, and strengthening agency partnerships, culture, boards and programs.

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## Experience

### Rebuilding Together Peninsula

Executive Director

July 2018 - Present

Redwood City, CA

Oversee strategic direction and overall operations of nonprofit agency with \$2M budget that provides vulnerable homeowners with free health and safety-related home repairs. RTP provides repairs year-round and an annual volunteer-driven event that brings thousands of volunteers together with homeowners needing assistance. Rebuilding Together Peninsula has been serving San Mateo County and northern Santa Clara County since 1979.

### VISIONS, Inc

Board Member

August 2019 - Present (1 year 6 months)

Visions-Inc.org's mission is to equip individuals, organizations, and communities with the tools needed to thrive in a diverse world, remove structural and cultural barriers that prevent full and equitable participation and help create environments where differences are recognized, understood, appreciated, and utilized for the benefit of all.

### Commission on the Status of Women

Member

December 2019 - Present (1 year 2 months)

San Mateo County, California, United States

### Community Overcoming Relationship Abuse

Executive Director

April 2003 - February 2018 (14 years 11 months)



## San Mateo, CA

Responsible for strategic direction, resource generation, operations and daily management of the sole domestic violence services agency in San Mateo County (pop. 700,000). Managed \$5.8 million budget and staff of 50. Agency operated 24-hour law enforcement response, shelters and hotline as well as supportive services (transitional and permanent supportive housing, therapy, legal assistance, community advocacy, education).

### Key Contributions

- Implemented the successful merger of two culturally distinct domestic violence agencies including renaming, re-branding and consolidation of finances, programs, boards, etc.
- Oversaw a nearly four-fold increase in the budget from \$1.5M to \$5.8M including increase in annual donor revenue from approximately \$250K to \$1M and 300% increase in grants revenue; managed a personal portfolio of major donors and regularly successfully solicited five and six-figure gifts
- Established and maintained \$2M endowment
- Increased assets from approximately \$3M to over \$8M
- Significantly strengthened collaborations with county agencies and other partner organizations
- Vice Chair, Domestic Violence Council, San Mateo County, 2006-2018
- Recipient, Woman of the Year, 22nd Assembly District, CA, 2015
- Recipient, Ruby Award for Excellence, Soroptimist International, N. San Mateo County, 2014

## BoardNet, Volunteer Center of San Mateo County Manager

January 1999 - March 2003 (4 years 3 months)

### San Mateo

Responsible for the development and day-to-day operations of a pilot program designed to support and strengthen the governing boards of nonprofits in San Mateo County. Provided consulting, training and facilitation to members of local boards of directors on governance-related issues including board member roles and responsibilities, recruitment, meeting management, fundraising, and staff/board relations. Supervised staff and consultants. Provided education, consulting and training for approximately 200 agencies and 300 board members annually.

- Oversaw ten-fold increase in participating agencies
- Designed and delivered 20-50 trainings per year.



- Initiated and facilitated Board Chair roundtables.
- Introduced, organized and oversaw annual conferences with nationally and internationally recognized keynote speakers on governance-related issues.

### Beaver Country Day School

Director of Summer Programs/English Teacher

January 1994 - October 1998 (4 years 10 months)

Brookline, Massachusetts

Managed one of the largest day/specialty summer programs in the U.S. offering over fifty different activities and serving over 1000 young people per season. Recruited, hired, trained and supervised 175 staff annually. Responsible for 25% of the school's annual revenue. Taught Honors high school English. Voted #1 Boston Area Camp, Reader's Choice Award three years in a row.

### Lukin & Associates

President

January 1989 - January 1993 (4 years 1 month)

Greater Boston Area

Founded and managed adventure-based leadership development and management consulting firm. Specialized in working with Fortune 100 businesses, K-12 institutions, and nonprofits on team building and leadership development. Clients included MIT Sloan School of Management, Harvard University's Principal's Center, JFK School of Government Institute for School Superintendents, Exxon Chemical and General Electric. Obtained public funding and designed and conducted trainings for teachers in applying experiential education to the classroom.

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## Education

### Brown University

Bachelor of Arts (B.A.), English Language and Literature/  
Letters · (1978 - 1982)

### Boston University

MBA, Nonprofit Management · (1991 - 1993)



## **GREGORY J. BERNARD**

### **SUMMARY**

Experience leading groups of people to bring projects to completion. As a general contractor leading teams to repair and renovate houses. As a lead engineer and project manager to implement business requirements. Positive, motivated team player with a strong work ethic. Self starter with an inquisitive mind who enjoys problem solving as well as interacting with people on a daily basis. Entrepreneurial spirit with an eye on the bottom line.

### **PROFESSIONAL EXPERIENCE**

**REBUILDING TOGETHER PENINSULA**, Redwood City CA June 2017 – Present

#### **Construction Program Director**

Responsible for construction related projects and issues for below market households.

- Project management for the Safe At Home program
- Dealt with jurisdictions and clients on permit related issues
- Scheduled jobs and technicians based on availability and need
- Performed billing and accounting on a quarterly or monthly basis
- Worked with Program staff on budget considerations for tools, warehouse, projects, and fund raising events
- Used Salesforce and Google software to track expenses and report metrics for reporting
- Worked with Development to set future contract and grant expectations
- Dealt with In-Kind donations based on current project requirements

**HABITAT FOR HUMANITY GREATER SF**, San Francisco CA March 2016 – May 2017

#### **Neighbourhood Revitalization Site Supervisor**

Worked as a site supervisor performing minor home repairs to below market income households.

- Performed job walks and estimated project scope in both hours and materials
- Dealt with clients to explain work being done, set expectations, coordinate schedules and minimize in house disruptions
- Led groups of volunteers, AmeriCorp, and JobTrain personnel to perform the work
- Jobs included but not limited to painting, electrical, plumbing, and carpentry
- Worked at large group events (Building Blocks) with corporate volunteers to perform repairs in a reduced time frame
- Used Salesforce software to manage volunteers and track their hours
- Worked with large retail chains to solicit corporate donations
- Tracked and reported work progress for office staff and business metrics

**BAY AREA HOME REPAIR**, Palo Alto CA 2004 – March 2016

#### **Owner**

Worked as a trades handyman and general contractor performing service work on residential buildings. Versed in all areas of company functions, including but not limited to:

- Estimated job scope both in terms of hours and materials



- Dealt with customers to manage expectations and establish a cordial rapport
- Ordered supplies to ensure that common materials were on hand while minimize inventory to avoid tax implications
- Performing the work either independently, with co-workers, or subs and managed the project accordingly
- Produced customer billing and tracked invoices for tax and company purposes
- Interacted with banks and business to get financing or lines of credit when applicable
- Produced tax statements for the CPA to prepare company income tax
- Sent reminders to customers and followed up on past due bills to keep accounts receivable up to date
- Advertised for the business and attended networking events to generate contacts and leads and meet other trades and crafts people

UNIVERSAL BUILDING SYSTEMS, Palo Alto CA 2006 – March 2016

**Project Manager**

Estimator and project manager for small tenant improvement remodels in the 500,000\$ - 1,000,000\$ range.

- Estimated job costs based on plans and specs.
- Interacted with clients to assess needs and determine constraints.
- Interacted with architects/engineers to determine plan scope and resolve drawing and/or technical issues.
- Interface for subcontractors in order to answer technical questions and provide guidance.
- Led field staff based on project schedule and any issues that arose during construction.
- Contacted vendors and ordered supplies based on project requirements and vendor pricing/availability.
- Stood for field inspections; answered and/or resolved any issues brought about by the inspector.
- Kept accounting department updated to insure timely and accurate billing.

KODAK HEALTH IMAGING, Fremont CA 2003 – 2004

**Quality Engineer/Continuous Process Engineer**

Technical project lead for a DICOM medical imaging replacement system. Guided installation and upgrade procedures, analyzed and debugged software issues. Managed system resources and schedule while executing test plans and procedures.

- Managed a three person team replacing a back end DICOM system. Replaced vendor specific system with a more open system, allowing opportunity for growth in three new arenas as well as saving the company on third party products.
- Researched requirements, and led the testing effort and documentation.
- Led the North American testing effort, worked closely with the team in France on issue resolution, as well as the team in Asia for international language support.
- Group representative in division CMM and SCM policies and procedures to enforce generally accepted coding standards and practices in order to achieve SCM Level 2 compliance.

LYCOS FINANCIAL DIVISION, Mountain View CA 1999 – 2002

**Principal Engineer**



Software maintenance consisting of Perl scripting, shell scripts, Java programming, and MS-SQL stored procedures in a five-tier architecture for financial news and research feeds.

- Led five person team re-launching partner OEM web site. Replaced proprietary Unix system with company standard NT system by adding functionality to NT system, and eliminating need to support two systems, which decreased operational expenses. Implemented new system architecture that lowered response time to less than 2 seconds and increased availability to 99.9% uptime.
- In conjunction with an international team, conducted needs analysis for sister company in Mexico. Implemented architecture that increased reliability and scalability towards goal of 2 second response time and 99.9% uptime, replacing their outdated, unreliable system.
- Liaison to Business Development for HTML Newsletter project that rivaled competitors' products. Worked with web development in building static home page suitable for emailing. Built custom Java JMS components and worked with operations, building an entirely new email farm supporting one hour post stock market open delivery requirement.
- Pioneered Global QA plan that standardized sites, projects, and processes throughout organization.

INTERACTIVE DATA CORPORATION, Hayward CA 1994 – 1999

#### **Senior Network Engineer**

Primary duties included network programming, system management, troubleshooting and configuring systems receiving financial stock market data from RS-232, V.35, or Ethernet using TCP/IP.

- Designed and integrated multicast headline receiver, decreasing response time from minutes to under 5 seconds.
- Implemented programs that received and re-distributed TCP data via broadcast and multicast, saving company money by eliminating redundant hardware.

#### **SOFTWARE TECHNICAL EXPERIENCE**

**Languages:** Java, J2EE, EJB, JDBC, JMS, SQL, XML, XSLT, ASP, HTTP, Perl, C, C++, FORTRAN

**Software:** Oracle, MS-SQL Server 2000, MS Word, Project, Excel, Apache, IIS, JBoss, Tomcat, Perforce, CVS, Ant, JUnit, DOORS, ClearQuest, QuickBooks

**Operating Systems:** Linux, VMS, Sun Solaris, Windows 2000

**Hardware:** VAXs, Alphas, IBM PC clones, Solaris workstations

**Other:** Servlets, TCP/IP, socket programming, shell scripting, RS-232, MIL-STD-1553B, V.35, GPIB bus logic, DICOM

#### **EDUCATION**

**General Building/B License**, CA #911976, March 2008, Palo Alto CA

**MS**, Computer Engineering, SAN JOSE STATE UNIVERSITY, San Jose CA

**BS**, Electrical Engineering, LAWRENCE TECH. UNIVERSITY, Southfield MI



## PERSONAL SUMMARY

A driven, versatile, and caring professional with a commitment to serving underprivileged and stigmatized populations and making a difference where I can. With more than 5 years of construction experience and more than 10 years of operations/administrative experience within the non-profit sector, I have a dynamic set of strengths and strong leadership skills.

## PROFESSIONAL EXPERIENCE

**02.2022 -Present**                      **Safe at Home Manager**  
**Rebuilding Together Peninsula**

### **Safe-at-Home Project Manager (01.2023 -Present)**

- Coordinating and overseeing the successful planning, scheduling, implementation, and completion of all Safe at Home projects
  - Developing appropriate scopes of work that comply with local jurisdictions funding parameters
- Attending and participating in weekly Leadership & Applications meetings
- Assessing sites and determining which ones are a good fit for Safe at Home
- Supervising and scheduling RTP's Repair Technicians/Laborers and Subcontractors
  - Overseeing AmeriCorp Volunteers
- Communicating with City and County Representatives for project approval and to secure funding
- Acquiring necessary building permits
- Ensuring site and personnel safety, as well as compliance with OSHA Safety Regulations and RTP's policies
- Managing expenses and billing
  - Tracking, documenting, and billing Staff Time, mileage to/from project sites
  - Cost-coding invoices and receipts, and submitting billing packets to CDBG for reimbursement
  - Issuing Requests for Proposals from Subcontractors and qualifying bids

### **Sequoia Mobile Home Trailer Park Project Manager (06.2022 - Present)**

- Managing 45 projects (RV's/trailers) within a local mobile home community in partnership with the County of San Mateo, to assist eligible, low-income residents correct Violations/Citations from Environmental Health and County Inspectors
  - Ensuring the work performed by RTP meet minimum applicable Code Requirements
- Scheduling and sequencing
- Coordinating, problem-solving, and negotiating with key Project stakeholders (i.e., County & State Officials, Residents, & Park Management)
- Most of the responsibilities listed above, under *Safe-at-Home Project Manager*

### **Intake Coordinator - Contract position via Robert Half (02.2022 - 06.2022)**

- First point-of-contact for inquiries and new/prospective Applicants
  - Entering new Homeowner/Community Facility Repair Applications into Salesforce
  - Collecting required supplemental applicant documentation and determining eligibility
- Scheduling and attending "Site Previews" with new Applicants
- Performing outreach to local community facilities and forming relationships with their Directors/Facilities dept.
- Identifying and developing alternative resources for ineligible Applicants

### **12.2021 – 02.2022:                      Various Contract (Temporary) Positions**

#### **Robert Half International**

- Deliberately retired from the for-profit sector and decided to exclusively work for non-profit organizations with values that aligned with my own, moving forward
- Paperwork and administrative duties

### **08.2020 – 12.2021                      Family & Health Sabbatical during COVID-19 Pandemic**

### **07.2017 – 07.2020                      Project Engineer & Estimating Coordinator**

#### **E.A. Davidovits & Co., Inc. (laid-off due to death of Boss & COVID-19 pandemic)**

- Project Engineer for a design-build, commercial general contractor
- Managing the bidding process
- Planning, coordinating, and organizing the activities of a construction project under the direction of the Sr. Project Manager / V.P. of Construction, from design/pre-construction to project close-out
- Preparing and negotiating changes to contracts with clients, architects, structural engineers, consultants, suppliers/vendors, and subcontractors
- Maintaining financial records and documentation; performing monthly audits
- Reviewing and issuing material specification submittals for AOR/Owner approval



- Supervising field personnel
- Managing & scheduling labor

**09.2010 – 03.2017**

***Operations Coordinator / Operations Manager***  
**California Institute of Integral Studies**

- Supervising a team of fifteen employees
- Establishing and maintaining vendor relations
- Department budgeting and basic accounting
- Negotiating significant cost-saving contracts
- Managing security for all campuses
- Member of Institutional Safety & Security Committee and Safety and Emergency Response Committee
  - Assessing individuals and groups to determine if they posed a security threat
- Developing and implementing Institute-wide policies
- Reduced purchasing budget by 40%
- Developing RFP's and coordinating bid response process for construction projects
  - Ensuring proposals were submitted in accordance with established project parameters, required specifications, and applicable building codes/ordinances

***EDUCATION***

**08.2012**

***B.A. in Critical Psychology*** (3.7 GPA)  
**California Institute of Integral Studies (CIIS)**

**09.2014 - 10.2014**

**Completed one year of graduate degree courses (psychology, philosophy & cosmology)**

***INTERESTS***

- Community outreach
- Consciousness studies
- Volunteering
- Reading & writing
- Integrative health
- Facilitating workshops for those affected by trauma
- Improving communication & listening skills



## Esmeralda Rodriguez-Ortiz

### **Selected Experience:**

#### **Client Intake and Outreach Coordinator**, Rebuilding Together Peninsula

Redwood City, CA | April 2019-Present

- Main contact for clients for intake and application process, healthy housing inspections, maintain client database, and update client files for audits.
- Designing and implementing a client outreach plan. Conduct presentation and tabling events.
- Support programs logistics for projects. Assist with billing, reporting and data entry.

#### **Housing Services Coordinator**, Abode Services

Redwood City, CA | Nov 2017 - May 2019

- Developed working relationships with clients to understand and meet their needs, assist with housing clients, resolve conflicts with landlords, monitoring progress and documentation.
- Reduced housing barriers and increased readiness by collaborating with participants.
- Refer participants to community service agencies for individualize needs.

#### **Housing Specialist**, Abode Services

Milpitas, CA | Oct 2016 - Nov 2017

- Responsible for \$1,000,000/year in subsidy payments to landlords, Evaluating and approving all leases, Housing Quality Inspections, organizing accurate participant demographic and income information for grant reporting.
- Housed 50 participants collaborating with case managers, landlords, and property managers.
- Scaled impact by working with eight partners agencies supporting people who are experiencing homelessness.

#### **Family Services Specialist**, Early Head Start/Child Care, Community Child Care Council of Santa Clara County

San Jose, CA | May 2015 - June 2016

- Launched Early Head Start program, growing parents served from 0 to 120 and recruiting 40 licensed childcare providers from scratch, maintaining positive and constructive relationships.
- Established health, nutrition, parenting, and child development programs; designed the recruitment program to connect with eligible families, and handled all documentation, statistics, and procedure creation.
- Trained five staff members on best practices, procedures, and their duties as agency ramped-up.

#### **Earl Head Start Home Visitor**, Encompass Community Services

Watsonville, CA | February 2010 - May 2015

- Managed a caseload of 12 pregnant and parenting teens, providing 90-minute visit-45 times a year, home-based visits with individualized development plans including nutrition, parent skills and health.
- Maintained up-to-date records of services, evaluations, and family progress for grant reporting.
- Initiated and ran playgroups/parent meetings to bring parents together for peer-learning and skill-building.

### **Education**

UC Santa Barbara

BA: Psychology, 2006

*Key Courses: Health Psychology,  
Child Development, Accounting,  
Abnormal Psychology*

### **Skills**

- Spanish (Native Speaker)  
- Salesforce Databases  
- Exceptional Organization  
- Excellent Prioritization  
- High Professional Standards

### **Training**

- OSHA 2021  
- Motivational Interviewing 2017  
- HQS Inspections 2016  
- Standard of Quality for  
Family Strengthening 2015



## JAN SAGER

**OBJECTIVE: To provide accounting services to small or early-stage companies and nonprofits.**

### Experience

#### ACCOUNTING CONSULTANT

Various Bay Area locations • 1999 – 2023

Provide freelance accounting services, including setup, ongoing maintenance, and preparation of financial reports for management and Board of Directors. Clients have included:

*David Powell, Inc., Financial Services Division:* assignments at Gazooba, Inc. (subsequently Qbiquity), Digital Fuel, Vetmedsupply.com

*IWACS Networks* (also responsible for incorporating the company and preparation of tax returns, trademark application, consulting agreements and stock plan documents)

*Supporting Our Sons* (a 501(c) (3) nonprofit organization advocating for the healthy development of whole boys)

*Rebuilding Together* (a 501(c) (3) nonprofit organization providing building renovation services to low-income homeowners and nonprofits)

*Woodside School Foundation* (a 501(c) (3) nonprofit organization raising funds to support the educational mission of Woodside Elementary School)

*Birdcage Press LLC* (publisher of art games, books and gifts featuring museum-quality art)

*Travelers' Tales, Inc.* (publisher of travel literature)

*Elfenworks Foundation* (a 501(c) (3) nonprofit organization focused primarily on issues of domestic poverty)

*Sococo* (a startup company developing an application for intuitive, collaborative online communication)

*Acterra* (a 501(c) (3) nonprofit organization focused on environmental issues)

#### DIRECTOR OF OPERATIONS

Morgan Interactive, Inc., San Francisco, CA • 8/93-11/98

Morgan Interactive developed animated educational software for children. The company grew during my employment to include up to 40 employees and independent contractors locally and over 100 working at the company's production facility in Southeast Asia. As the company's second employee, I had management responsibilities in all areas of the company's operations; managed relationships with outside accountants, attorneys, lessors and vendors; and had extensive contact with the company's principal investor and shareholder (based in Luxembourg) with respect to financial, stock, investment and legal matters.

##### *Accounting and Tax:*

- Implemented all accounting-related systems
- Managed payroll and 1099 reporting



- Prepared financial statements
- Estimated and tracked project costs
- Prepared depreciation/amortization schedules
- Generated cash flow analyses
- Prepared tax returns
- Managed audits

*Legal:*

- Drafted, reviewed and/or negotiated agreements and other documents relating to:  
Software development, independent contractors and consultants, loans and promissory notes, preferred stock financing, equipment lease, and employee stock option plan
- Prepared copyright applications
- Prepared corporate minutes
- Managed insurance claims
- Prepared capitalization tables

*Human Resources and Benefits:*

- Selected and implemented medical/dental benefits
- Tracked employee stock options and issued shares
- Handled employee relations issues
- Implemented vacation policies
- Created procedures manual

*Manufacturing ('93-'95):*

- Coordinated package and graphics production
- Tracked finished goods and parts inventory
- Coordinated product manufacturing
- Selected suppliers

*Office and Equipment:*

- Purchased office equipment, including telephone system
- Managed office lease and renovations
- Managed equipment lease

## **SENIOR PARALEGAL**

Brown & Bain, Palo Alto, CA • 11/86 – 7/93

Litigation paralegal at high technology and intellectual property litigation firm. The position required rapid assimilation of information on a variety of technical subjects. Collected and analyzed documents in complex civil litigation cases for clients including Intel, Dell Computer, Conner Peripherals, and United Technology Corporation. Implemented computerized databases and other document control systems for management of millions of pages of documents and exhibits. In addition:

- Supervised paralegal teams on large cases and at trial
- Wrote training materials for junior staff
- Performed factual and legal research

## **Education:**

Stanford University, B.A. Psychology, With Distinction

UC Berkeley Extension: Financial Accounting

Pricewaterhouse Coopers Expert Access Seminar: "Tax and Accounting Issues for Start-Ups"

Stanford Professional Education Executive Programs: Financial Seminar

Carr McClellan seminar: Legal Issues Surrounding Investment Planning for Exempt Organizations

## **Other:**

Treasurer, Friends of the Woodside Library



## Rebuilding Together Peninsula

Board of Directors: 2022-23

### 4<sup>th</sup> Term

| Name & Affiliation   | Contact Information | Term End Date        | Start Date |
|--|---------------------|----------------------|------------|
| <b>Kurt Ricci</b><br>Vice President,<br>Webcor Builders          |                     | 4th Term<br>12/30/23 | 2015       |
| <b>Fergus O'Shea</b><br>Director, Campus Development<br>Facebook |                     | 4th Term<br>12/30/23 | 2015       |
| <b>Larry Briscoe, Treasurer</b><br>Retired                       |                     | 4th Term<br>12/30/24 | 12/16      |

### 3<sup>rd</sup> Term

| Name & Affiliation  | Contact Information | Term End Date        | Start Date |
|---|---------------------|----------------------|------------|
| <b>T. Hardy Jackson, Chair</b><br>Managing Director<br>EncoreLogic, LLC |                     | 3rd Term<br>12/30/23 | 12/17      |
| <b>Nick Palmer</b><br>CEO, Commercial Casework                          |                     | 3rd Term<br>12/30/23 | 12/17      |

### 2<sup>nd</sup> Term

| Name & Affiliation   | Contact Information | Term End Date        | Start Date |
|--|---------------------|----------------------|------------|
| <b>Damon Ellis</b><br>Senior Vice President<br>Whiting-Turner              |                     | 2nd Term<br>12/30/23 | 12/19      |
| <b>Peter Tsai</b><br>Vice President of Real Estate<br>Sobrato Foundation   |                     | 2nd Term<br>12/30/23 | 12/19      |
| <b>Paul Moran</b><br>Vice President of Operations<br>Level 10 Construction |                     | 2nd Term<br>12/30/23 | 12/19      |
| <b>Rumana Jabeen</b><br>Realtor<br>Rumana Jabeen & Associates              |                     | 2nd Term<br>3/31/24  | 3/20       |
| <b>Pete Hooper</b><br>President, Hooper Construction<br>and Remodeling     |                     | 2nd Term<br>5/31/24  | 5/20       |
| <b>Garrett Farwell</b><br>Solution Engineer, Salesforce                    |                     | 2nd Term<br>7/31/24  | 7/20       |



## Rebuilding Together Peninsula

Board of Directors: 2022-23

|   |  |                                  |       |
|---|--|----------------------------------|-------|
| <b>Corinne Augustine</b><br>Interim VP of Operations<br>Intersect ENT |  | 2 <sup>nd</sup> Term<br>11/30/24 | 11/20 |
|---|--|----------------------------------|-------|

### 1st Term

| Name & Affiliation  | Contact Information | Term                             | Start Date |
|---|---------------------|----------------------------------|------------|
| <b>Susan Moriconi</b><br>Chief Human Resources Officer<br>Personalis                                  | (                   | 1 <sup>st</sup> Term<br>7/30/23  | 7/21       |
| <b>Katy Scott</b><br>Sr. Director, Integration,<br>Facilities, and Site Services<br>Roche Diagnostics | (                   | 1 <sup>st</sup> Term<br>11/30/23 | 11/21      |
| <b>Anna Zuo</b><br>Commercial Banking Regional<br>Manager, Tri Counties Bank                          | (                   | 1 <sup>st</sup> Term<br>11/30/24 | 11/22      |
| <b>Angela Castro</b><br>Partner<br>Seubert French Frimel &<br>Warner LLP                              |                     | 1 <sup>st</sup> Term<br>11/30/24 | 11/22      |
| <b>Jim Fowler</b><br>CEO<br>Novo Construction   | (                   | 1 <sup>st</sup> Term<br>11/30/25 | 11/23      |
| <b>Nicki Lowy</b><br>Community<br>Development Manager<br>Google                                       | (                   | 1 <sup>st</sup> Term<br>9/30/24  | 9/22       |
| <b>Jean Snider</b><br>Associate Vice President,<br>Real Estate<br>Stanford University                 |                     | 1 <sup>st</sup> Term<br>1/30/25  | 1/23       |

### Executive

| Name & Affiliation                       | Contact Information |                    |
|--|---------------------|--------------------|
| Melissa Lukin<br>Executive Director, RTP |                     | Executive Director |

**Board Meeting Dates in 2022:** 1/27/22, 3/24/22, 5/26/22, 6/17/22 (all day retreat), 7/28/22, 9/22/22, 11/17/22

**Board Term Limits:** One board term is two years long and each board member is limited to a total of 4 terms (8 years).



## Menlo Park NOFA Applications

| NOFA     |  | Mid Pen Housing   | HIP Housing                     | Habitat of Greater SF  | Rebuilding Together Peninsula   |
|----------|--|---|---------------------------------|--|---|
| Priority | Developer, Project Name, Address                   | VA Perm Supportive Housing<br>795 Willow Rd.                                | 1162 El Camino Real             | 123 Independence   | Various Locations   |
|          | <b>Project Type</b>                                | New Construction  | New Construction                | New Construction   | Rehabilitation  |
|          | <b>Tenure</b>                                      | Rental  | Rental                          | Ownership  | Ownership   |
|          | <b>Target Poplulation</b>                          | Vets/families formerly or at risk of homelessness                           | Families                        | Families   | Families, seniors, disabled   |
| *        | <b>Central or West Menlo Park?</b>                 | N-Willows   | Y-Downtown                      | N-Bayfront Innovation Area   | N-Belle Haven   |
|          | <b>Current Use</b>                                 | Over flow parking and grass area  | Small retail/office             | Vacant commercial  | Single family   |
|          | <b>Surrounding Uses</b>                            | VA campus, single family and multi family residential, commercial           | Offices, retail                 | Offices, residential   | Residential   |
| *        | <b>Walking Distance (1/2 mi) Transit/Amenities</b> | Sam Trans (3 routes), grocery store, VA health care systems, 2 public parks | DT Menlo Park, Sam Trans, Train | 1/2 mile to park, 1 mile to shopping/ services   | Neighborhood schools, bus stops, child care, church restaraunts       |
| *        | <b>Improve Property/ Neighborhood?</b>             | Y   | Y                               | Y  | Y   |
| *        | <b>Very Low and Low Income HH?</b>                 | Y   | Y                               | Y  | Y   |
|          | <b>Total Housing Units</b>                         | 62  | 9                               | 18   | 8   |
|          | <b>ELI:0-30% AMI</b>                               | 20  | 0                               | 0  | 5   |
|          | <b>VLI: 30-50% AMI</b>                             | 40  | 0                               | 0  | 2   |
|          | <b>LI: 50-80% AMI</b>                              | 0   | 9                               | 18   | 1   |
|          | <b>Mgr. Units</b>                                  | 2   | N/A                             | N/A  | N/A   |
|          | <b>BMR Requirement?</b>                            | 9   | 3                               | 18   | N/A   |
| *        | <b>Affordable for at least 55 years</b>            | Y   | Y                               | Y  | N/A   |
| *        | <b>Family Units 2+ BR?</b>                         | N- mostly 1BR   | Mixed-S,1, 2                    | Y  | Y   |
|          | <b>Studio</b>                                      | 0   | 2                               | 0  | 0   |
|          | <b>1 BR</b>  | 55  | 3                               | 0  | 0   |
|          | <b>2 BR</b>  | 5   | 4                               | 3  | 2   |
|          | <b>3 BR</b>  | 2   | 0                               | 6  | 5   |
|          | <b>4 BR</b>  | 0   | 0                               | 9  | 1   |
| *        | <b>Community Spaces/Amenities</b>                  | Multi purpose room/computer station/outdoor community space, garden         | Unit balconies                  | Units contain laundry, ground floor BR, most have balconies. Open green space with seating areas, playground | Grab bars, handrails, trip resistant flooring to assist age in place. |
|          | <b>Parking</b>                                     | 55 surface parking, 62 bike parking   | 9 parking garage, bike parking  | 18 attached garages, bike parking  | N/A   |
|          | <b>Financial Info</b>                              |   |                                 |  |   |
|          | <b>Land</b>  | 7,350,000   | 3,400,000                       | 8,000,000  |   |
|          | <b>Development Cost Excl Land</b>                  | 52,206,584  | 13,241,490                      | 19,303,560   |   |



## Menlo Park NOFA Applications

| NOFA     |   | Mid Pen Housing  | HIP Housing   | Habitat of Greater SF  | Rebuilding Together Peninsula  |
|----------|---|--|---|--|--|
| Priority | Developer, Project Name, Address                                      | VA Perm Supportive Housing<br>795 Willow Rd.   | 1162 El Camino Real   | 123 Independence   | Various Locations  |
|          |   | <b>Total Dev Cost (Incl land)</b>  | 59,556,584  | 16,641,490   | 27,303,560   |
|          |   | <b>Dev Cost per Unit (excl land)</b>   | 842,042   | 1,471,277  | 1,072,420  |
|          |   | <b>City Financial Request</b>  | 2,000,000   | 11,315,903   | 2,000,000  |
|          |   | <b>City Assistance per Unit</b>  | 32,258  | 1,257,323  | 111,111  |
| *        | <b>Reasonable Costs, Ability to Compete for Other Funding Sources</b> | Y  | N   | Y  | Y  |
|          | <b>Confirmed Funding Sources</b>                                      | SMC AFH predevelop (500K)<br>Land donation (7.3M)<br>30 VASH vouchers  | Land donation (3.4M)  | Land donation est. (8M)<br>Developer contribution (2M)   | N/A  |
|          | <b>Anticipated Funding Sources</b>                                    | SMC AFH (5.5M)<br>AHP(1M)<br>Vet homeless program(11.1M)<br>Tax credits ( 32M)<br>VASH vouchers  | Perm Loan (2M)  | Other public funds: SMC AFH,<br>HOME, AHP, CEC Build (5.7M)<br>Developer contribution(2M)<br>Targeted private funds(2M)<br>HGSF Mortgages (7.7M)<br>Homeowner sweat equity | N/A  |
| *        | <b>Readiness (completion goal of 3 yrs)</b>                           | Y  | N   | N  | Y  |
|          | <b>Project to Date</b>  | Selected by VA through RFQ in 2019<br>Formal planning app submitted 9/22 to City<br>Expect letter of conformance once HE is approved   | 9 units entitled Feb 2020<br>Construction docs completed        | Draft EIR 11/22<br>LOI from owner 2/23   | 8 owners screened for eligibility and initial list of repairs made.                  |
|          | <b>Future Timeline</b>  | Apply for financing March 2023 -March 2024 (Tax credits March24)<br>Submit for Bldg Sept 2024<br>Execute Lease Oct 2024<br>Start Const Dec 2024<br>Complete Const March 2026 | Obtain perm loan 3 mos<br>Unknown time to confirm gap financing | Planning Entitlements Winter 23<br>Design Docs Winter 24<br>Bldg permit and start construction Fall 25<br>Complete construction Fall/Winter 27                             | Finalize scopes of work, secure bids, and complete construction. (3 mos per project) |
| *        | <b>Proposed Density Compared to Max Allowed</b>                       | 62/64  | 9/9.6   | 432/815  | N/A  |
| *        | <b>Incorporate Green Building</b>                                     | Y  | Y   | Y  | varies   |
| *        | <b>Local HireProgram</b>  | Can consider as long as it doesn't conflict with Section 3 and County requirements   | Can consider as long as it doesn't create cost implications.    | Relies on volunteer labor and owner sweat equity, makes efforts to use local subcontractors  | Outreach to subcontractors that are closest to projects.                             |



## Menlo Park NOFA Applications

| NOFA     |   | Mid Pen Housing   | HIP Housing  | Habitat of Greater SF   | Rebuilding Together Peninsula  |
|----------|---|---|--|---|--|
| Priority | Developer, Project Name, Address                    | VA Perm Supportive Housing<br>795 Willow Rd.  | 1162 El Camino Real  | 123 Independence  | Various Locations  |
| *        | <b>Experienced Development Team</b>                 | Y   | Y  | Y   | Y  |
|          | <b>Site Control</b>                                 | VA letter committing to 99 year lease to be signed after receiving tax credits.   | Under negotiations (Prince Street Partners current owners)   | LOI with owner  | Obtained title reports for each owner  |
| *        | <b>Promotes HealthyLiving Environment</b>           | Y   | Y  | Y   | Y  |
| *        | <b>Consistent with Housing Element/General Plan</b> | HE 2023 Housing Opportunity Site (#64)<br>HE Goals 3,4:Provide special needs housing and affordable housing for ELI and VLI incomes<br>H3.F: Work with VA to reduce homelessness<br>GP: Enhance neighborhoods, promote mixed uses, sustainable planning | H1.3/H4.12 Fair share distribution in neighborhoods<br>H4.3 Housing choices near jobs/tranist<br>H4.7 Infill near Downtown<br>H4.12 100% Affordable housing in high opportunity areas<br>GP: Enhance neighborhoods, sustainable planning | H3.L Provide large family size units<br>H4.3 Mix of units sizes and affordability levels in master project<br>H5.1 Opportunities for those historically excluded from ownership<br>H5.7 Provide ownership<br>GP: Enhance neighborhoods, promote mixed use, sustainable planning | H2.1 Maintenance, Improvement of existing housing, H2.5 Maint and mgt of quality housing and neighborhoods.<br>Program H2.C Assist Housing Rehab programs particularly in Belle Haven. |
|          | <b>Community Outreach Plan</b>                      | Met with various stakeholders (11 meetings 8/19 to 7/22)<br>Virtual Neighborhood mtg (7/22)<br>Noticing via email and direct mail   | HIP will work with City to develop community outreach plan if revisions to the approved project are desired.   | Met w/ 15 stakeholders (Winter 22/23), 2 Community Meetings (11/22). Dedicated outreach mgr who works w/ local agencies. Targeted affirmative outreach. Bilingual print and social media, and direct mailings.  | Grass roots outreach: door to door, direct mail, info thru other agencies, presentations to groups, events, social media   |
|          | <b>Application Submittal Date</b>                   | 1/27/2023   | 1/27/2023  | 1/26/2023   | 1/27/2023  |