



20269 BROADWAY

SONOMA, CALIFORNIA

RESPONSE TO REQUEST FOR PROPOSALS AND QUALIFICATIONS

30 OCTOBER 2015

SONOMA COUNTY COMMUNITY DEVELOPMENT COMMISSION
SONOMA COUNTY HOUSING AUTHORITY
1440 GUERNEVILLE ROAD, SANTA ROSA, CA 95403-4107



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Provided under separate cover: SAHA audited financial statements.

SECTION 1: COVER SHEET

Request for Proposals and Qualifications for Development of 20269 Broadway, Sonoma, California

Cover Sheet

Individual/Agency Name: Satellite Affordable Housing Associates (SAHA)
Mailing Address: 1835 Alcatraz Avenue, Berkeley, CA 94703
E-mail Address: estewart@sahahomes.org
Telephone Number: 510-809-2754
Primary Contact Person: Eve Stewart

The Proposer certifies that all documents listed below are valid as of the date of this proposal and that current, dated copies have been submitted with this proposal. All items must be included in the response to the Request for Preliminary Proposals in order to meet minimum qualifications. Please organize proposal materials in the order listed below.

Signature:  Date: 10/29/15

Check items included in the proposal (two hard copies):

Proposal Coversheet (this page)



Project Overview



Financing Plan



Organizational Information



Qualifications



SECTION 2: PROJECT CONCEPT

SECTION 2: PROJECT OVERVIEW

The site at 20269 Broadway in Sonoma presents an exciting opportunity to meet affordable housing needs in Sonoma Valley while enhancing a prominent corner along one of the City's major thoroughfares. SAHA proposes to develop 49 homes on the site, incorporating a community clubhouse, play area, gardening beds and sustainable building features. SAHA will continue our partnership with La Luz Center and will also work with COTS to ensure that families are supported in their housing and have opportunities to realize their full potential.

Development Concept

SAHA envisions a vibrant community serving families and individuals with a combination of 1-, 2- and 3- bedroom units. All of the units will be affordable to very low and extremely low-income households and 10% of units will be set-aside for people who are currently without shelter and an additional 10% for disabled veterans.

SAHA proposes the following residential unit mix and affordability levels:

Unit Type	No. Units	AMI Affordability	Net Rent
1 bedroom	10	30% AMI	\$422
1 bedroom	0	40% AMI	\$572
1 bedroom	3	50% AMI	\$722
1 bedroom	6	60% AMI	\$863
subtotal	19 units		
2 bedroom	3	30% AMI	\$503
2 bedroom	3	40% AMI	\$683
2 bedroom	9	50% AMI	\$863
subtotal	15 units		
3 bedroom	3	30% AMI	\$577
3 bedroom	3	40% AMI	\$785
3 bedroom	9	50% AMI	\$993
subtotal	15 units		
Total	49 units		

In addition to providing housing opportunities for working families, 20269 Broadway will also provide homes for households experiencing homelessness and for veterans. A total of five (5) one-bedroom units will be set-aside for veterans who are currently unsheltered and who meet the HUD definition of chronically homeless. An additional five (5) units will be set-aside for disabled veterans. SAHA has considerable experience housing people who were previously unsheltered and who may have special needs; our experience and services plan is discussed in more detail later in this section.

If selected, SAHA would be very interested in working with the adjacent landowners to purchase their property for incorporation into the development to create more housing.

Site Plan & Open Space

Responding to the City's design guidelines and development code, our design creates an attractive street presence consistent with the scale and character of the surrounding neighborhoods. In recognition of the acute need for affordable housing in the Valley, we have incorporated 49 units into the site plan in a combination predominantly in two-story buildings. The site plan preserves the existing Valley Oak trees on site and endeavors to maintain as many of the other existing mature, healthy trees as possible to provide shade and privacy for the adjacent parcels.

The proposed homes are organized around a central shared open space that is anchored by existing Valley Oak trees in the center of the property. The larger two- and three- bedroom units are centrally located to provide families direct access to common outdoor spaces and allow for supervised play.

The site plan offers ample open spaces and gathering areas adjacent to the community clubhouse and includes centrally located play areas for toddlers and young children. Raised garden beds throughout the site offer opportunities for residents to grow their own flowers, herbs, and vegetables. Gardening is very popular with SAHA residents!

Pedestrian paths are arranged to encourage strolling through the property and foster a sense of neighborhood community.

Parking is placed at the perimeter to avoid conflicts between play areas and vehicles and to provide a buffer to surrounding uses, particularly to the homes located immediately to the west of the site. We have incorporated 61 parking stalls to allow for a dedicated space for each unit plus additional parking for visitors and staff.

The site plan also allows for full fire department access with a "T" turn around.

Community Clubhouse & Other Amenities

At the corner of Broadway and Clay Street, a spacious community clubhouse welcomes residents and visitors alike to the property. The clubhouse provides a large community room with a full kitchen for gatherings and activities as well as smaller activity and meeting rooms. A computer lab will be available for individual resident use as well as to facilitate homework club and computer literacy classes sponsored by our services partner La Luz. The clubhouse also includes a lobby/lounge, property management office, services office and laundry. The laundry is adjacent to the patio and play areas allowing residents to enjoy the outdoors or play with their children while waiting for the laundry cycle.

Large doors lead from the clubhouse directly to a large patio with the play structure and gardening beds just beyond. This adjacency supports indoor/outdoor activity programming such as tai chi, gardening club, farm-to-table cooking projects, and community potlucks. This proximity is also helpful to families with young children, enabling them to attend meetings or classes in the community room while their children play within view.

Covered bicycle parking is located in several locations around the property and we will also include a charging station for electric vehicles powered by the property's photo-voltaic renewable energy system.

Architecture & Unit Designs

As envisioned, the character of the buildings at 20269 Broadway is consistent with the vernacular traditions of Sonoma and the surrounding communities, and also consistent with high quality contemporary materials and detailing. Local design references and influences include front porches, low fences, and craftsman-style detailing.

Proposed buildings have sloped roofs and simple well-proportioned massing. Each unit will have a front porch, or shared front porch. Along Clay Street, units have front porches along the street to emphasize neighborhood connections and to maintain consistency with the style of existing homes on Clay Street. Elevations along Clay Street and Broadway are two-stories tall; in two interior locations buildings increase to 3-stories but stay within the 36' height limit.

Materials will include horizontal siding and high quality cement plaster with troweled finish. Roofing will be factory finish standing-seam metal and asphalt shingle with low reflective index. Service elements such as electric meters, roof vents and downspouts will be carefully integrated into the overall design.

The two- and three- bedroom units will be predominately townhome units allowing for separation between living and sleeping areas and better access to outdoor spaces for families. Two- and three-bedroom flats will also be provided to ensure accessibility and to accommodate households that cannot utilize stairs.

Unit finishes will be high-quality and durable with an emphasis on non-toxic products that promote healthy indoor air quality.

Green Building & Sustainability

Over the years, SAHA has made substantial investment in green building technologies at our housing developments and within our organization. Since 2003, the majority of SAHA's developments have incorporated renewable energy systems (photovoltaics and/or solar thermal) and we have recently upgraded our older buildings with PV systems using an incentive program from the State's California Solar Initiative. Our projects have been featured on the Build It Green Home tours and guidebook since 2005 and we have been called upon to set regional standards for green building through participation in pilot programs with Build It Green, HUD EnergyStar Midrise, and Bayfriendly Landscaping Coalition. We have set an internal goal of achieving a minimum of LEED Silver on all new construction projects and several of our newest developments have earned LEED Platinum accreditation.

At 20269 Broadway, Sustainable design will be integrated into each design decision, from building orientation to material selection. Stormwater management will be integrated into the landscape design via bioswales; the use of drought tolerant landscape program will give the site a bountiful yet sustainable landscape identity. “Edible landscaping” that incorporates herbs and fruit trees will be used.

We will also work to implement **virtual net-metering** at 20269 Broadway allowing us to distribute savings from the property’s photo-volatic system back to tenants thereby directly reducing their individual electricity bills. We have successfully implemented net-metering at our Valley Oak Homes property. We will also work with the City to incorporate a **gray-water irrigation system** similar to what we pioneered at Valley Oak Homes. This system takes wastewater from sinks and washing machines located in the clubhouse and uses it for landscape irrigation at the property. The overall goal for 20269 Broadway is to achieve a minimum LEED Silver certification.

Resident Services

At 20269 Broadway, SAHA’s Director of Resident Services, Chris Hess, will work closely with our local service partners La Luz and COTS to ensure that a high level of on-site services are available to our residents. La Luz and SAHA have worked together since 2013 to provide supports to families living at SAHA’s property Valley Oak Homes in Sonoma. La Luz will facilitate community engagement activities (potlucks, movie nights) as well as health & wellness programs and educational supports (financial literacy, computer lab, homework club, parenting classes) available to all residents at the property. COTS (Committee on the Shelterless) will work specifically with residents who were unsheltered prior to coming to live at the development. Since 1988, COTS has provided emergency shelter, transitional housing, and a range of supportive services to help people and families experiencing homelessness in Sonoma County. Their services at the property will include work readiness and wellness programs, case management, and referrals to medical care. Please find enclosed letters of interest from La Luz and COTS.

SAHA is experienced in serving people who were formerly homeless and we are integrally involved in efforts to end homelessness throughout the Bay Area region. Currently over 200 units in our portfolio serve individuals who were previously unsheltered before moving to our housing. These households are supported by SAHA’s services team and in partnership with local service agencies and health care providers. Housing retention rate for our previously homeless residents is at 97%.

Community Process

One aspect that sets SAHA apart from other groups during the development process is our commitment to community engagement process. SAHA has developed an authentic and highly participatory method for involving local stakeholders in the

design & entitlement process. Our approach is designed to maximize constructive dialogue and opportunities for collaboration. The process involves the following key elements that would be implemented for the 20269 Broadway site:

- **Identify community-wide stakeholders** and leaders representing different sectors including local businesses, the faith community, sustainability advocates, economic development, and social service agencies.
- **Meet one-on-one or in small groups** with neighboring residents and merchants who will be directly impacted by the development and construction of the project.
- **Hold an initial community-wide open house** to familiarize stakeholders with SAHA's organization, completed projects, and property management team. The open house is also an opportunity to orient participants to the site and how it relates to the surrounding uses. We begin to collect feedback on community preferences, hear participants' hopes for the project, and listen to concerns. At this time we also solicit potential volunteers for the Community Advisory Community (CAC).
- **Convene a Community Advisory Committee (CAC)** very early in the process. During the initial community open house (see above), we encourage people to join the CAC, which is a group of 6-10 stakeholders from different segments of the community. For example for one recent project, our CAC consisted of three neighbors, a social service provider, a local real estate broker, and a local design professional. On another, our CAC included several neighbors, a member of the clergy, and a senior executive from the local hospital. The CAC is asked to meet three to four times over a series of several months to consider design options, evaluate trade-offs, and to review site planning and architectural details.
- **Prepare schematic drawings**, with input from the CAC, to be submitted for approval through the City's entitlement process. Before permit submittal, the development team and the CAC will present the preferred design concept at a second community open house.

We have found that this collaborative approach to involving stakeholders during the design phase is a highly successful way to build consensus and arrive at the best development for the community. CAC members are asked to commit to attend all meetings to ensure continuity and to play a role in communicating the process and goals of the project to other stakeholders. SAHA will lead this community process in close partnership with our architect Peter Waller of Pyatok Architects, which has decades of experience with community design and planning efforts.

Project Timeline

Please find below a detailed project schedule. We have projected being able to complete the project in 3.5 years. We estimate five months to complete our community engagement process and to develop the entitlements package that will be submitted for approval by the City. County and State-wide competitive funding applications are predominantly offered only one time per year and projects typically

must demonstrate that they are fully entitled with all environmental clearances in order to be eligible for funding. Therefore, it typically takes at least one year for a project to secure 100% of the financing needed.

Below is an estimated schedule assuming Developer recommendation in Dec 2015.

Milestone	Date
DDA Drafting & Negotiations	Jan-Feb 2016
DDA Execution	Feb-16
Begin Community Engagement Process	March-16
Finalize Schematic Design through Stakeholder Process	July-16
Planning Application Submittal	Sept-16
Planning Approval	Dec-16
Select General Contractor	Jan-17
Submit Various Funding Applications*	Dec -16 to July-17
Design Development	Feb -April 2017
Tax Credit Application	Jul-17
Construction Documents Phase	July-Oct 2017
Notification of Tax Credit Award	Sept-17
Submit for Building Permit	Oct-17
Select Construction Lender & Tax Credit Investor	Nov-17
Negotiate Lender/Investor Terms & Docs	Dec-17

Close Financing; Acquire Site	Feb-18
Start Construction	Feb-18
Begin Residential Marketing	Aug-18
Complete Construction	April-19
Residents Move-In	May-July 2019
Grand Opening Celebration	Sept-19

**Includes County, AHP, VHHP, and AHSC funding applications*



PYATOK
Lori Cagwin Landscape Architecture

20269 BROADWAY

VIEW FROM BROADWAY

1

DEVELOPMENT SUMMARY

1 Bedroom: 19 40%
 2 Bedroom: 15 30%
 3 Bedroom: 15 30%
Total Units: 49
61 Parking Spaces
1.24 / Unit

Low Shrubs & Perennials
 Sage, Beard Tongue, Achillea, Verbena,
 Rockrose, Ceanothus, Manzanita

Small Fruiting Tree
 Apple, Plum, Pear, Peach, Apricot, Cherry

15' Sideyard Setback

Medium Fall Color Tree
 Pistache, October Glory Maple

Low Gabion Wall w/low Ornamental Grasses
 Pennisetum, Helictorichon,
 Sesleria, Stipa

Bioswale w/Riparian Plantings
 Sedge, Dwarf Matrush, Red Stem
 Dogwood, Cape Rush

Resident Entry Access
 Permeable Concrete

Medium Evergreen Tree
 Arbutus "Marina", Armstrong Maple

Guest Entry Access
 Permeable Concrete

Foundation Hedge
 Sunset Manzanita, Dwarf Olive, Aus-
 tralian Ivory Bells, Maidenhair Grass,
 Feather Reed Grass

2-Story Townhomes

20' Front Setback, Typical

Guest Entry Access
 Permeable Concrete

Small Flowering Tree
 Crabapple, Redbud, Plum, Dogwood,
 Star Magnolia

Large Evergreen Tree
 Valley Oak, Blue Oak

DG Paving W/Boulder Outcrops

Shaed Shrubs & Groundcovers
 Garpenteria, Ribes, Vaccinium,
 Carex, Manzanita

Waste & Recycling

Resident & Visitor
 Parking
 (61 spaces)

Espaliers on Split Rail Fence
 Picnic Area

Persimmon

Play Structure

Turf Area

Raised Planters

Picnic Area

DG Paving

Community Room

2-Story Stacked Flats

Private Resident Entrance

Horizontal Wood Slat Low Fence
 Pennisetum, Helictorichon

CLAY STREET

BRAGG STREET

BROADWAY



PYATOK
 Lori Cagwin Landscape Architecture

20269 BROADWAY



SITE PLAN

2

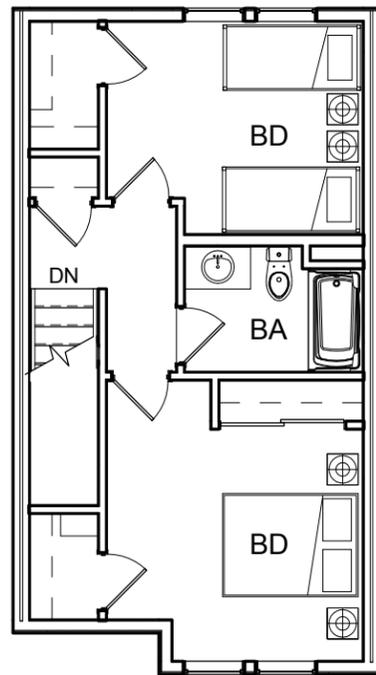


ELEVATION AT BROADWAY

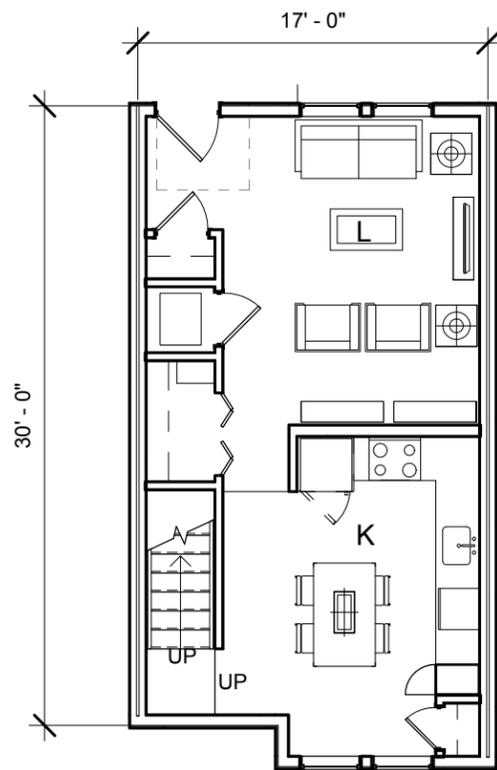


ELEVATION AT CLAY STREET

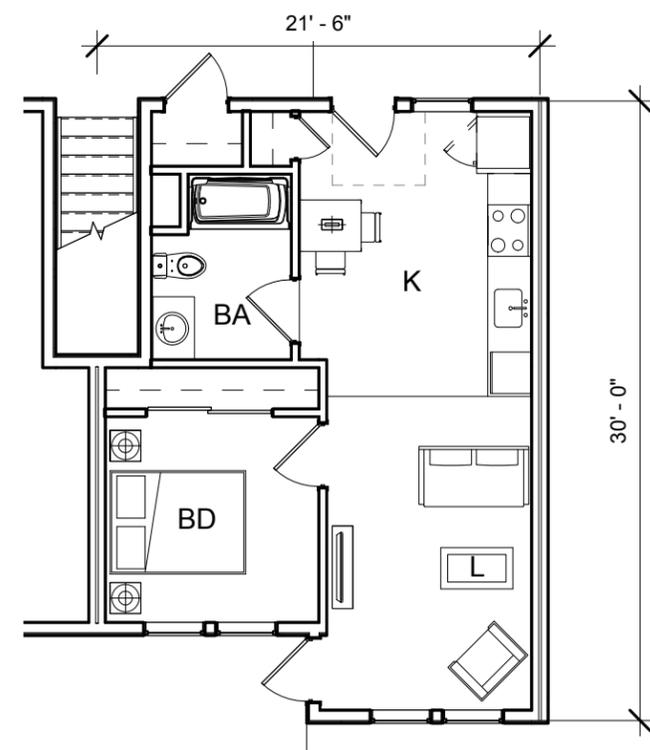




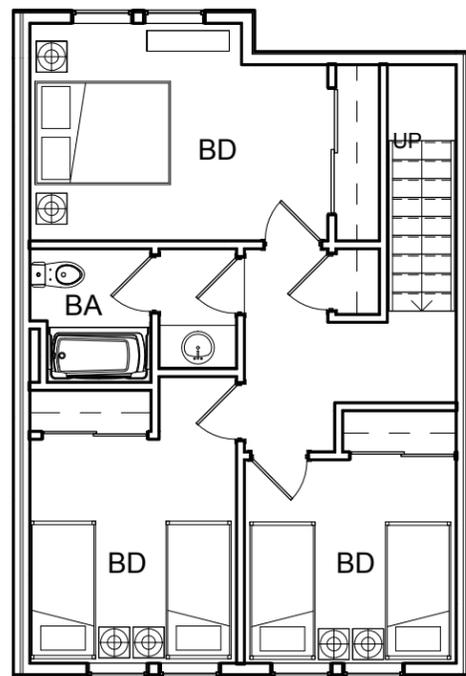
2BD TH 2ND FLR



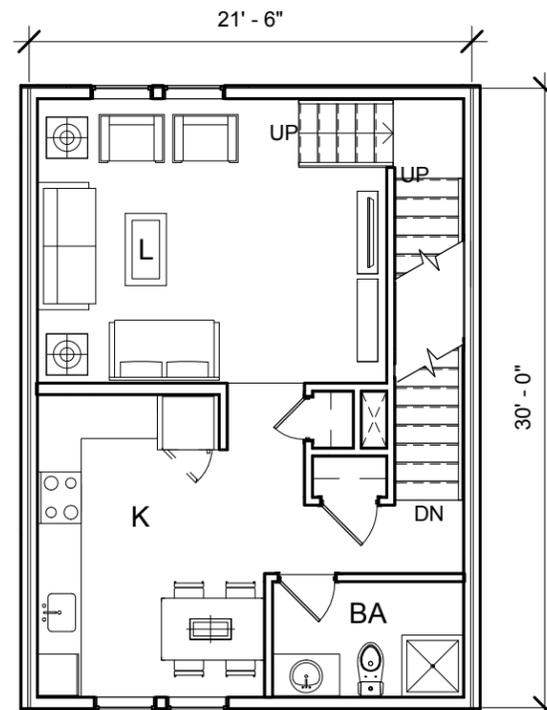
2BD TH GROUND FLR



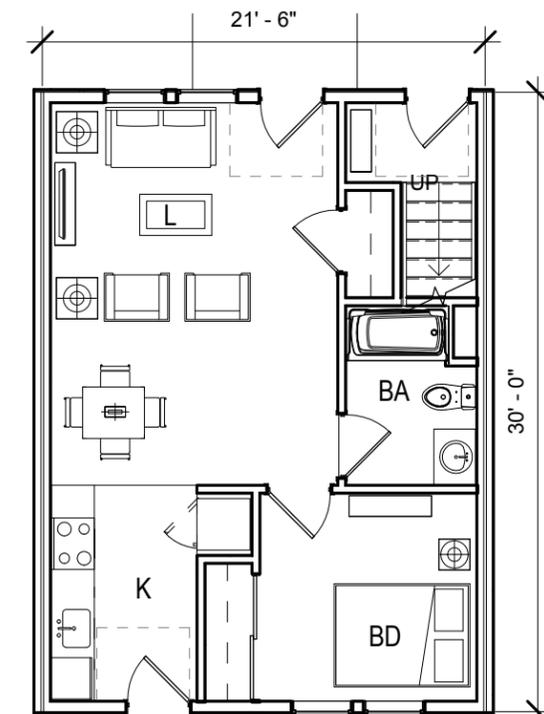
1BD/1BD GROUND FLR



3BD AT 3RD FLR



3BD TH AT 2ND FLR
(AT GRADE, 3BD TH SIM.)



1BD GROUND FLR



17560 Greger St
Sonoma, CA 95476
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Marcie Waldron

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Juan Hernandez III

La Luz is a 501(c) 3
Nonprofit organization
Tax ID # 68-0228235
www.laluzcenter.org

Legacy Giving ...
please include
La Luz Center in your
estate planning.

October 23, 2015

Eve Stewart
Satellite Affordable Housing Associated (SAHA)
1835 Alcatraz Avenue
Berkeley, CA 94703

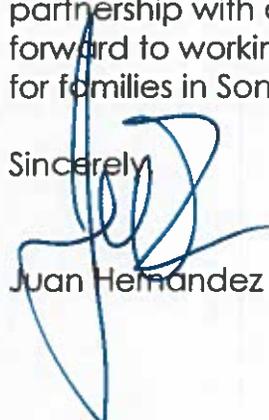
Dear Eve:

On behalf of La Luz Center, I am pleased to provide this letter of interest and support for your proposed development in the City of Sonoma located at 20269 Broadway. We understand that you are proposing to construct affordable family housing on the site that will serve very-low and extremely low households.

Since 2013, we have collaborated with SAHA to provide supportive services and resource referrals to families living at SAHA's Valley Oak Homes development on Lyon Street in Sonoma. The new proposed development on Broadway would be a natural expansion of that partnership. Our services include parenting classes, assistance with food security, financial literacy, employment readiness, computer literacy, tutoring, and health care access. La Luz serves as the primary resource in Sonoma Valley for disadvantaged families who are seeking opportunities to become economically self-sufficient. We focus on providing essential upstream skills to educate and empower our community.

We are excited about the opportunity to expand our partnership with at your new housing development. We look forward to working with you to expand housing opportunities for families in Sonoma and better serve the community.

Sincerely,



Juan Hernandez III



October 27, 2015

Eve Stewart
Satellite Affordable Housing Associates (SAHA)
1835 Alcatraz Avenue
Berkeley, CA 94703

Dear Eve:

On behalf of Committee on the Shelterless (COTS), I am pleased to provide this letter of interest and support for your proposed development in the City of Sonoma located at 20269 Broadway. We understand that you are proposing to construct affordable family housing on the site that will include approximately five to seven units set-aside for people currently without homes.

Since 1988, COTS has provided emergency shelter, transitional housing, and a range of supportive services to help people and families experiencing homeless in Sonoma County. Our services include parenting classes, financial literacy, work readiness, and wellness programs including case management and referrals to medical care. Our programs and services empower homeless families and single adults to break the cycle of homelessness, transform their lives, and stay permanently housed.

We are excited about the opportunity to increase our services in Sonoma Valley by partnering with SAHA to provide supportive services at your new housing development. We look forward to working with you to expand housing opportunities for families and better serve the community.

Sincerely,

A handwritten signature in black ink, appearing to read "Mike Johnson", is written over a light gray background.

Mike Johnson
CEO

COTS – Committee on the Shelterless
(707) 478-2481

Providing help and hope...one life at a time

SECTION 3: FINANCING PLAN

SECTION 3: PROJECT FINANCING PLAN

As requested in the RFP, we have provided a detailed financial analysis and plan for the proposed project at 20269 Broadway. In this section we have also included a letter of interest in providing financing for this project from Silicon Valley Bank. Finally, we have also included under separate cover three years of SAHA's audited financial statements.

Financing Plan

The total development budget for 20269 Broadway is estimated at \$20,795,237. The financing plan includes the 9% LIHTC program, a combination of State, County, and City funds, plus private debt, equity and grants. The enclosed pro forma provides detailed information regarding projected project costs and proposed funding sources. Please note that all construction costs assume prevailing wages.

Key items to note include:

- **County Land Loan.** The County has indicated its willingness to donate the site to the project. We recommend structuring the land contribution as a sale to the project whereby the sales price is equal to the appraised value and the City provides financing for the acquisition in the form of a long-term deferred payment loan (55 or 59- year loan term at 3% deferred interest).
- **9% LIHTC Program.** With an award of 9% low-income housing tax credits (LIHTC) we project the project can generate nearly \$15 million in private equity proceeds. SAHA has an excellent track record attracting equity to our deals; in August of this year we received unprecedented equity investment pricing equal to \$1.22 for each \$1 of tax credit. This high yield is a reflection of SAHA's reputation as a highly capable housing sponsor and developer with an outstanding record of success. We have successfully worked with direct placement investors such as Wells Fargo and Union Bank as well as syndicated equity funds through Raymond James and the National Equity Fund.
- **Affordable Housing & Sustainable Communities Fund (AHSC).** This State program, funded through California's cap & trade emissions market, debuted in 2015 and provides funding for transit-oriented affordable housing as well as transit-related improvements. SAHA was one of the few organizations in the State to secure funding for one of our projects during the program's very first round of awards in June 2015. AHSC funds reflected in the 20269 Broadway pro forma represent only the housing funds we expect to secure; additional funds for transit and transit-related improvements are also available. We look forward to working with the City of Sonoma and the regional transit agency to put forth a winning application that secures funding for both housing and transit improvements.

- **Veterans' Housing and Homeless Prevention Program (VHHP).** This State program debuted in 2015 and provides funding to create housing for homeless and disabled veterans. SAHA was one of only a few organizations in the State to secure funding under this program; we won awards for two of our projects during the program's first round of awards in June 2015. We look forward to accessing this resource to help end homelessness among Sonoma's vets.
- **Additional County Subsidy.** In addition to the land loan (see above), SAHA proposes to seek County HOME funds in the amount of \$445,000 and CDBG funds in the amount of \$200,000 for off-site improvements.
- **Project Based Section 8.** We will work to secure 10 Project-Based Section 8 vouchers. This will enable the project to leverage a \$500,000 mortgage and will support units targeted to homeless and disabled veterans.
- **Private Debt.** The financing plan includes a private construction loan, to be provided by a major financial institution such as Silicon Valley Bank or Wells Fargo, in the amount of \$15,580,396. The construction loan would have an 18 month term and typically would carry a floating interest rate based on an index (eg. LIBOR) + lender spread. In recent years, short-term rates have been consistently very low, eliminating the need to hedge against rate increases during construction. However in an inflationary environment rate locks or swaps can be purchased to reduce risk of sudden rate spikes. We estimate the permanent mortgage, typically financed through the same institution providing the construction loan, to be in the amount of \$511,909. Please see enclosed letter of interest from Silicon Valley Bank with regard to project financing.

SAHA Audited Financials

Please find enclosed under separate cover SAHA audited financial statements for Fiscal Years 2014, 2013, and 2012. Please note that SAHA's fiscal year runs from July 1 to June 30.

Financing Plan

Construction	
Uses	
\$ 1,550,000	Land / Acquisition
\$ 14,473,252	Construction
\$ 669,466	Architecture
\$ 175,000	Survey & Engineering
\$ 1,099,894	Construction Interest & Fees
\$ -	Permanent Financing
\$ 50,000	Legal
\$ -	Reserves
\$ 1,057,102	Other Costs
\$ 750,000	Developer Costs
\$ 79,516	Syndication Costs
\$ 19,904,229	Total Uses
Sources	
\$ -	Perm Loan
\$ 1,478,833	Federal Tax Credit Equity
\$ -	AHSC
\$ 650,000	FHLB AHP
\$ 1,550,000	County Loan: Land
\$ 445,000	County HOME
\$ 200,000	County CDBG
\$ -	Other: VHHP
\$ 15,580,396	Construction Loan
\$ 19,904,229	Total Sources

Permanent	
Uses	
\$ 1,550,000	Land / Acquisition
\$ 14,473,252	Construction
\$ 669,466	Architecture
\$ 175,000	Survey & Engineering
\$ 1,099,894	Construction Interest & Fees
\$ 25,000	Permanent Financing
\$ 50,000	Legal
\$ 105,042	Reserves
\$ 1,073,552	Other Costs
\$ 1,450,000	Developer Costs
\$ 124,031	Syndication Costs
\$ 20,795,237	Total Uses
Sources	
\$ 511,909	Perm Loan
\$ 14,788,328	Federal Tax Credit Equity
\$ 2,000,000	AHSC
\$ 650,000	FHLB AHP
\$ 1,550,000	County Loan: Land
\$ 445,000	County HOME
\$ 200,000	County CDBG
\$ 650,000	Other: VHHP
\$ -	Construction Loan
\$ 20,795,237	Total Sources

Permanent Sources

Permanent Sources

Description	Totals	Term	Notes
Perm Loan	\$ 511,909	10 years	NOI + S8 increment combined
Federal Tax Credit Equity	\$ 14,788,328		
AHSC	\$ 2,000,000		
FHLB AHP	\$ 650,000		
County Loan: Land	\$ 1,550,000		reflects value of City land contribution
County HOME	\$ 445,000		
County CDBG	\$ 200,000		
Other: VHHP	\$ 650,000		

Non-Permanent Sources

Acquisition Loan:			
Predevelopment Loan:			
Construction Loan	\$ 15,580,396		
SAHA Corporate Predev Loan?			
Total Sources	\$ 20,795,237		
Total Uses	\$ 20,795,237		
(GAP)/Surplus	\$0		

Permanent Uses

Description	Budgeted	NC/Rehab Eligible Basis	Notes
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LAND/ACQUISITION

Land Cost	\$ 1,550,000	X	per 2012 appraisal
Predevelopment Loan Fees	1% \$ -	X	
Predevelopment Loan Interest	3% \$ -	X	
LAND/ACQUISITION TOTAL	\$ 1,550,000	\$ -	

CONSTRUCTION

Demolition		X	
Bldg Construction	\$220 psf \$ 10,839,320	\$ 10,839,320	
Landscape	\$ 1,000,000	\$ 1,000,000	includes site work & off-site improvements
Contractor Overhead & Profit	\$ 550,000	\$ 550,000	
General Conditions	\$ 500,000	\$ 500,000	
Contractor Insurance & Bonds	\$ 250,000	\$ 250,000	
Owner Furnishings	\$ 100,000	\$ 100,000	
PV System	\$ 150,000	\$ 150,000	
Hard Cost Contingency	10% \$ 1,083,932	\$ 1,083,932	
CONSTRUCTION TOTAL	\$ 14,473,252	\$ 14,473,252	

ARCHITECTURAL FEES

Architecture & Engineering	5% \$ 669,466	\$ 669,466	
ARCHITECTURAL FEES TOTAL	\$ 669,466	\$ 669,466	

SURVEY & ENGINEERING

Survey	\$ 20,000	\$ 20,000	
Engineering - Geotechnical	\$ 85,000	\$ 85,000	
Enviro Assessment & Testing	\$ 20,000	\$ 20,000	
Construction Testing & Inspec	\$ 50,000	\$ 50,000	
SURVEY & ENGINEERING TOTAL	\$ 175,000	\$ 175,000	

Description	Budgeted	Eligible Basis	Notes
CONST INTEREST & FEES			
Construction Loan Fees	0.75% \$ 129,894	\$ 129,894	manually entered
Construction Lender Costs	\$ 75,000	\$ 75,000	
Construction Loan Interest	4% \$ 840,000	\$ 840,000	assuming a \$15m construction loan
Prevailing Wage Monitoring	\$ 20,000	\$ 20,000	
Construction Title & Recording	\$ 35,000	X	
CONST INTEREST & FEES TOTAL	\$ 1,099,894	\$ 1,064,894	
PERM FINANCING COSTS			
Perm Title & Recording	\$ 25,000	X	
PERM FINANCING TOTAL	\$ 25,000	\$ -	
LEGAL			
Owner Legal - Construction	\$ 40,000	\$ 40,000	
Owner Legal - Org, RE, Synd & Perm	\$ 10,000	X	
LEGAL TOTAL	\$ 50,000	\$ 40,000	
RESERVES			
Operating Reserve	3 mos \$ 105,042	X	
RESERVES TOTAL	\$ 105,042	\$ -	
OTHER COSTS			
Permit Fees	\$ 175,000	\$ 175,000	
Impact Fees	\$ 460,911	\$ 460,911	
Utility Connection Fees	\$ 7,000	\$ 7,000	
Green Certifications - LEED	\$ 15,000	\$ 15,000	
Builders Risk & GL Insurance	\$ 100,000	\$ 100,000	
Community Outreach	\$ 10,000	\$ 10,000	
Appraisal	\$ 15,000	\$ 15,000	
Market Study	\$ 20,000	\$ 20,000	
Marketing & Leasing	\$ 68,500	\$ 68,500	
Soft Cost Contingency	7% \$ 200,691	\$ 200,691	
Other Misc	\$ 1,450	\$ 1,450	
OTHER COSTS TOTAL	\$ 1,073,552	\$ 1,073,552	
DEVELOPER COSTS			
Developer Fee	\$ 1,400,000	\$ 1,400,000	
Construction Management	\$ 50,000	\$ 50,000	
Other Consultants	\$ 10,000	\$ 10,000	
DEVELOPER COS TOTAL	\$ 1,450,000	\$ 1,450,000	
SYNDICATION COSTS			
Syndication Consultant	\$ 50,000	X	
Accountant Fee	\$ 15,000	X	
TCAC Fees	\$ 59,031	X	from TC page
SYNDICATION COSTS TOTAL	\$ 124,031	\$ -	
TOTAL PROJECT COSTS	\$ 20,795,236	\$ 18,946,163	

Unit Mix (Rent and Income Levels)

Bedrooms	AMI	Description	Section 8	Total Units	Gross Rent	Utility Allowance	Net Rent	Proposed Rent	Annual Rental Income	FMR/Contract Rents	Section 8 Payment	Annual Section 8 Income
1	30%		Yes	10	\$ 450	\$ 28	\$ 422	\$ 422	\$ 50,640	\$ 1,047	\$ 625	\$ 75,000
1	30%			0	\$ 450	\$ 28	\$ 422	\$ 422	\$ -	\$ 1,047		
1	40%			0	\$ 600	\$ 28	\$ 572	\$ 572	\$ -	\$ 1,047		
1	50%			3	\$ 750	\$ 28	\$ 722	\$ 722	\$ 25,992	\$ 1,047		
1	60%			6	\$ 900	\$ 37	\$ 863	\$ 863	\$ 62,136	\$ 1,047		
2	30%			3	\$ 540	\$ 37	\$ 503	\$ 503	\$ 18,108	\$ 1,370		
2	40%			3	\$ 720	\$ 37	\$ 683	\$ 683	\$ 24,588	\$ 1,370		
2	50%			9	\$ 900	\$ 37	\$ 863	\$ 863	\$ 93,204	\$ 1,370		
3	30%			3	\$ 622	\$ 45	\$ 577	\$ 577	\$ 20,772	\$ 2,019		
3	40%			3	\$ 830	\$ 45	\$ 785	\$ 785	\$ 28,260	\$ 2,019		
3	50%			9	\$ 1,038	\$ 45	\$ 993	\$ 993	\$ 107,244	\$ 2,019		
					\$ -							
					\$ -							
					\$ -							
					\$ -							
					\$ -							
Total:				49					\$ 430,944			\$ 75,000

Cash Flow

		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Income											
Rent	2.5%	\$ 430,944	\$ 441,718	\$ 452,761	\$ 464,080	\$ 475,682	\$ 487,574	\$ 499,763	\$ 512,257	\$ 525,063	\$ 538,190
Section 8 Rental Subsidy		\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000	\$ 75,000
POTENTIAL GROSS INCOME:		\$ 505,944	\$ 516,718	\$ 527,761	\$ 539,080	\$ 550,682	\$ 562,574	\$ 574,763	\$ 587,257	\$ 600,063	\$ 613,190
LIHTC Units Vacancy	5.0%	\$ (21,547)	\$ (22,086)	\$ (22,638)	\$ (23,204)	\$ (23,784)	\$ (24,379)	\$ (24,988)	\$ (25,613)	\$ (26,253)	\$ (26,910)
Section 8 Units Vacancy	5.0%	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)	\$ (3,750)
EFFECTIVE GROSS INCOME:		\$ 480,647	\$ 490,882	\$ 501,373	\$ 512,126	\$ 523,147	\$ 534,445	\$ 546,025	\$ 557,894	\$ 570,060	\$ 582,531
Expenses											
Operating Expenses	3.5%	\$ 353,500	\$ 365,873	\$ 378,678	\$ 391,932	\$ 405,649	\$ 419,847	\$ 434,542	\$ 449,751	\$ 465,492	\$ 481,784
Local Assessments & Fees	2.0%	\$ 2,500	\$ 2,550	\$ 2,601	\$ 2,653	\$ 2,706	\$ 2,760	\$ 2,815	\$ 2,872	\$ 2,929	\$ 2,988
Replacement Reserve Deposits	\$ 350	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150	\$ 17,150
TOTAL EXPENSES		\$ 373,150	\$ 385,573	\$ 398,429	\$ 411,735	\$ 425,505	\$ 439,757	\$ 454,507	\$ 469,772	\$ 485,571	\$ 501,922
NET OPERATING INCOME		\$ 107,497	\$ 105,309	\$ 102,943	\$ 100,391	\$ 97,642	\$ 94,688	\$ 91,518	\$ 88,122	\$ 84,489	\$ 80,609
Hard Debt Service											
Perm Loan											
Principal & Interest		\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667
Fees		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total		\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667	\$ 66,667
Required Payments											
Bond Monitoring Fee		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bond Admin Fee		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
VHHP Required Debt Service	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730	\$ 2,730
MHSA Service Fee		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other: (Specify)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other: (Specify)		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CASH FLOW:		\$ 38,100	\$ 35,913	\$ 33,547	\$ 30,994	\$ 28,245	\$ 25,291	\$ 22,121	\$ 18,725	\$ 15,092	\$ 11,212

October 28, 2015

Ms. Eve Stewart
Director, Housing Development
Satellite Affordable Housing Associates
1835 Alcatraz Avenue
Berkeley, CA 94703

RE: 20269 Broadway, Sonoma, CA

Dear Ms. Stewart:

Satellite Affordable Housing Associates ("SAHA") has been invited to respond to a recent Request for Proposals (RFP) for the development of affordable family housing on a County-owned site at 20269 Broadway in Sonoma, CA. Subject to our standard underwriting and due diligence process, Silicon Valley Bank (SVB) would be interested in submitting a financing proposal to SAHA for construction and permanent financing at the appropriate time. The site has good proximity to health care services and schools, and is in an area with a high need for affordable housing.

SVB has a long standing relationship with SAHA, having provided financing for several of their projects over the last 10+ years, most recently for the Valley Oaks project in Sonoma, which was completed in 2013. We are currently in the process of closing another project with SAHA, for which we are providing construction debt, as well as equity (through National Equity Fund, Inc., as the tax credit syndicator). We value our relationship with SAHA and appreciate the opportunity to continue do business with them on their projects.

Since 2002, SVB has committed over \$100 million across multiple funds in CRA qualified investments and closed over \$700 million in loans in over 4,000 affordable housing units. In 2014 alone, SVB funded \$90 million in new construction loans. We have extensive experience in structuring financing to meet the complex capital and regulatory requirements for community development projects.

If you have additional questions or need anything further in support of your proposal, you can contact me at (415) 764-3144.

Sincerely,



Anne Simpson
Vice President II/Relationship Manager – Community Development Finance

SECTION 4: ORGANIZATIONAL INFORMATION

SECTION 4: ORGANIZATIONAL INFORMATION

Satellite Affordable Housing Associates (SAHA) is a California 501(c)3 public benefit corporation with 48 years of experience developing, owning, and managing affordable housing in the Bay Area. Over the years, SAHA has developed a total of 61 affordable apartment communities to serve seniors, families, and special needs groups. We work closely with the local community to plan and design buildings that are contextual and that will meet the needs of neighborhood stakeholders as well as future residents.

Our mailing address and main place of business is:

SAHA
1835 Alcatraz Avenue
Berkeley, CA 94703
www.sahahomes.org

In addition we staff a property management office at 875 Lyon Street, Sonoma and 571 Petaluma Ave, Sebastopol.

Susan Friedland, Executive Director, is authorized to execute documents on behalf of the organization. Susan can be reached at 510-809-2762 or by email at sfriedland@sahahomes.org

Eve Stewart, Director of Housing Development, will serve as the main point of contact for the Commission during this process. Eve can be reached at 510-809-2754 or by email at estewart@sahahomes.org

Disclosures:

SAHA has not had an incident of disbarment or other disqualification as a vendor for any federal, state, or local entities.

Attachment 3:
Declaration of Local Business For Services

Sonoma County gives local businesses a preference in formal solicitations of services as set forth in the County of Sonoma Local Preference Policy for Services.

In order to qualify for this preference, a business must meet *all* of the following criteria:

1. For businesses with a location in a city within Sonoma County, a valid business license if required by the city; and
2. A valid physical address located within Sonoma County from which the vendor or consultant operates or performs business on a day-to-day basis.

By completing and signing this form, the undersigned states that, under penalty of perjury, the statements provided herein are true and correct and that the business meets the definition of a local business as set forth in the County of Sonoma Local Preference Policy for Goods.

All information submitted is subject to investigation as well as disclosure to third parties under the California Public Records Act. Incomplete, unclear, or incomprehensible responses to the following will result in the bid not being considered for application of the County's local preference policy. False or dishonest responses will cause the rejection of the bid and curtail the declarant's ability to conduct business with the County in the future. It may also result in legal action.

1. Legal name of business: Petaluma Avenue Homes L.P.

2. Physical address of the principal place of business.

571 Petaluma Avenue Sebastopol, CA

3. Business license issued by incorporated city within the County:

License Number PET 0005

Issued by: City of Sebastopol

Authorized Signature:  Date: 10/29/15

Printed Name & Title: Eve Stewart - HWsig Director

SECTION 5: QUALIFICATIONS & EXPERIENCE

SECTION 5: QUALIFICATIONS & EXPERIENCE

Satellite Affordable Housing Associates (SAHA) will serve as the developer, owner, and property manager of 20269 Broadway. SAHA is a California 501(c)3 public benefit corporation with 48 years of experience developing, owning, and managing affordable housing in the Bay Area. Over the years, SAHA has developed a total of 61 affordable apartment communities to serve seniors, families, and special needs groups. We work closely with the local community to plan and design buildings that are contextual and that will meet the needs of neighborhood stakeholders as well as future residents.

As a mid-sized non-profit with a focus on Bay Area counties, SAHA is able to respond to local housing needs by creating beautiful, efficient, and affordable developments that serve households who would otherwise face limited or dire alternatives. Our residents are able to thrive and achieve goals around health, education, and employment once they are stably housed. Currently we provide housing for more than 3,000 residents including 200 households that were previously homeless.

We are proud that our developments have won national recognition for quality and innovation. In 2014, our Valley Oak Homes property in Sonoma was named “Best Green Project in the Nation” by Affordable Housing Finance Magazine.

SAHA is governed by a volunteer Board of Directors recruited from a diversity of professional and personal backgrounds. SAHA is a HUD-approved Community Housing Development Organization (CHDO) with one-third of our Board of Directors comprised of low-income members. We also have a goal of significant resident representation on the Board and currently three seats are filled by SAHA residents. We employ 170 highly skilled and committed full-time staff.

Our organization supports three primary program areas: housing development, property management, and resident services. By acting as owner, developer, and property manager, SAHA is deeply committed to the long-term health, maintenance, and quality of each of our properties.

SAHA Housing Development

The SAHA Housing Development team is highly skilled in all phases of project development including site acquisition, managing design and entitlements, securing project financing, and overseeing construction completion. Each potential development site is evaluated closely to ensure it is located near quality-of-life amenities such as transit, schools, health clinics, parks, and shopping. On every project, the architectural team is carefully selected to ensure it has the right design aesthetic for the surrounding neighborhood as well as the appropriate experience. Areas that particularly distinguish SAHA during the development process include our commitment to **green building** and **community process**. These strengths are described in more detail in *Section 2: Project Overview*.

SAHA also has considerable experience working in partnership with public agencies to develop affordable housing on City-owned land. In each of the following examples, SAHA was selected through a competitive process and then entered into a Development and Disposition Agreement with the sponsoring City:

- *Valley View Homes, American Canyon, CA*
- *Harper Crossing, Berkeley, CA*
- *Tower Park, Modesto, CA*
- *Valley Oak Homes, Sonoma, CA*
- *Petaluma Avenue Homes, Sebastopol, CA*
-

More information about these and other representative projects are provided on the project profile sheets included later in this section.

SAHA Housing Development Key Staff

The following key Housing Development staff will be assigned to the project. Brief descriptions of their professional experience as well as their role in this project are provided below. We have also included resumes following the narrative portion of this section. In addition, SAHA's Executive Director, Susan Friedland, will provide overall strategic guidance.

Eve Stewart, Director of Housing Development
(510) 809-2754
estewart@sahahomes.org

Eve Stewart has over 15 years of experience in real estate finance and development and has been with SAHA since 2003. During her tenure, Eve has directly managed or overseen the completion of more than 1,000 housing units. Currently, Eve is responsible for 750 units in SAHA's predevelopment pipeline.

Eve will oversee all aspects of SAHA's work to develop 20269 Broadway. Eve will be the County's direct point of contact during the selection process and will work closely with County staff to negotiate and execute the DDA. Eve will actively lead the community engagement process with neighbors and stakeholders and will be closely involved in the design and entitlement process with the City.

Devin Elin, Project Manager
(510) 809-2769
delin@sahahomes.org

Devin Elin has over 8 years of experience in real estate development and urban planning. Since joining SAHA in 2013, Devin has been involved in the development of over 250 units of housing representing nearly \$100m in total development costs. Devin holds a master's degree in Urban and Regional Planning with a certificate in Real Estate Development and a Bachelor of Science in Environmental Engineering.

Devin will work closely with Eve during the community engagement process and schematic design phase and will have lead responsibility for preparing and submitting funding applications.

Susan Friedland, Executive Director
(510) 809-2762
sfriedland@sahahomes.org

As the Executive Director of SAHA, Susan Friedland leads a team of 170 staff and guides the strategic direction of the organization. Prior to the merger between Satellite Housing and Affordable Housing Associates (AHA) in 2013, Susan was AHA's executive director for nine years. During that time, the organization doubled its housing portfolio, significantly grew its net worth, and won numerous local and national awards. Previously, Susan was the Director of Housing Development with Fifth Avenue Committee, a community-based development corporation in Brooklyn, NY. Susan received the National Award for Women in Planning from the American Planning Association and was recently honored by the Girl Scouts for her work promoting green building. Susan serves on the Board of Directors of the Nonprofit Housing Association of Northern California (NPH), and Enterprise's Community Leadership Committee. She holds a Masters of City Planning degree from U.C. Berkeley and graduated Phi Beta Kappa with a BA in Urban Studies from Brown University.

SAHA Property Management

SAHA has provided property management services since 1971 and today manages 55 properties. Having a number of facilities under one central management entity provides valuable economies of scale in operations and an efficient coordination of services for all developments.

The property management staff of SAHA is highly skilled and experienced in the affordable housing field. SAHA has thirty-five full-time managers, dedicated maintenance and janitorial staff, and a transportation program. Staff are responsible for providing a wide range of services including responding to resident requests and concerns, carrying out day-to-day maintenance, and coordinating capital improvements such as roof replacements. Property Managers monitor property waiting lists, fill vacancies promptly when they occur, perform tenant screening, and carry out annual income certifications.

SAHA has created and implemented preventative maintenance programs, management control systems, and emergency preparedness programs for all of our properties.

The many buildings in SAHA's portfolio represent a tremendous community asset, one that staff has pledged to protect. This commitment and care is evident in the excellent condition of SAHA's properties, including those that have been in operations for three decades or more.

SAHA Resident Services

As a housing provider for over 40 years, SAHA has seen the tremendous impact that our services program has made in lives of our residents, helping them to achieve their life goals and maintain stable housing. Our program provides personalized, supportive services to all families and individuals living in our housing communities. Currently, SAHA employs thirty full time services staff and conducts a robust volunteer program that incorporates over 250 volunteers per year.

Each of our properties is staffed with resident service coordinators who provide one-to-one non-clinical case management. In addition, SAHA delivers a comprehensive array of programs designed to help families and individuals form and strengthen social connections, develop new skills, and maintain the best possible physical, emotional, and cognitive health. These programs include social and recreational activities, community gardening, exercise and health classes, civic engagement opportunities, intergenerational interaction, and service coordination.

SAHA also has experience serving people who were formerly homeless. Currently over 200 units in our portfolio serve individuals who were previously unsheltered before moving to our housing. These households are supported by SAHA's services team and in partnership with local service agencies and health care providers. Housing retention rate for our previously homeless residents is at 97%.

At 20269 Broadway, SAHA's Director of Resident Services, Chris Hess, will work closely with our local service partners La Luz and COTS to ensure a high level of on-site services are available to our residents. La Luz and SAHA have worked together since 2013 to provide supports to families living at SAHA's property Valley Oak Homes in Sonoma. La Luz will facilitate community engagement activities (potlucks, movie nights) as well as health & wellness programs and educational supports (financial literacy, computer lab, homework club, parenting classes) available to all residents at the property. COTS (Committee on the Shelterless) will work specifically with residents who were unsheltered prior to coming to live at the development. Since 1988, COTS has provided emergency shelter, transitional housing, and a range of supportive services to help people and families experiencing homelessness in Sonoma County. Their services at the property will include work readiness and wellness programs, case management and referrals to medical care.

ADDITIONAL TEAM MEMBERS

SAHA's development team for 20269 Broadway also includes an architectural team with whom we have a history of successful collaboration: Pyatok Architects and Lori Cagwin, Landscape Architecture.

Pyatok Architects, Architect

Pyatok Architects is an award-winning Architecture and Urban Design firm based in Oakland. Pyatok's mission is to provide the highest quality design and technical

assistance in a world of shrinking resources to people across a wide spectrum of incomes, socio-cultural backgrounds, and ages. Our practice is not based on design formulas, stylistic or otherwise. We undertake careful research to uncover the unique needs of the community being served, and organize a process that engages our clients and community in a participatory, people-centered effort customized to the context. We have devised useful 2D and 3D tools to help stakeholder groups create and evaluate a wide variety of physical options that meet not only their functional requirements, but also reflect their values, goals, and aspirations.

Pyatok has successfully collaborated with SAHA to create beautiful, livable affordable housing including The Orchards on Foothill in Oakland, CA (completed 2010) and Tabora Gardens in Antioch, CA (construction start June 2016).

Peter Waller, Principal, will lead the design & entitlement process along with Curtis Caton and Teresa Dias. Resumes are included at the end of this section.

Lori Cagwin, Landscape Architecture

With over 35 years of experience, Lori has provided Landscape Architectural services throughout the Bay Area in site planning and landscape development of parks, schools, multi-unit residential subdivisions, inns, wineries, commercial properties, and residential estates. She is an experienced professional with a broad range of expertise in all aspect of landscape design and installation. She has led and managed multidiscipline teams on numerous commercial, residential and residential projects from conceptual through final design and construction. She has been involved in LEED certification projects, and dedicated to restoration of native habitats, historical preservation, community involvement, Xeriscape principals for both plant material and irrigation system development. Recent projects with SAHA include Valley Oak Homes in Sonoma and Valley View Senior Homes in American Canyon.

REFERENCES

We are pleased to provide the following references for SAHA. We have included a range of contacts who can speak to our effectiveness when it comes to planning, design, financing and development. Additional references are available upon request.

Norma Thompson

Housing Development Manager
City of Oakland
250 Frank Ogawa Plaza
Oakland, CA 94612
Phone: 510. 238.7137
Email: NThompson@oaklandnet.com

Kara Douglas

Affordable Housing Program Manager
Contra Costa County
30 Muir Road
Martinez, CA 94553
Phone: 925.674.7880
Email: kara.douglas@dcd.cccounty.us

David Goodison

Planning Director
City of Sonoma
One the Plaza
Sonoma, CA
Phone: 707.938.3681
Email: davidg@sonomacity.org

Dana Shigley

City Manager
City of American Canyon
4381 Broadway Street, Suite 201
American Canyon, CA 94503
Phone: 707. 647.4369
Email: dshigley@cityofamericancanyon.org

Tim McCann, Senior VP

Community Lending & Investment
Wells Fargo Bank - LIHTC Equity
333 Market Street, 18th Floor
San Francisco, CA 94105
Phone: 415.801.8520
Email: tim.mccann@wellsfargo.com

Lori Saito, Vice President

Community Lending & Investment
Wells Fargo Bank - Debt
45 Fremont Street, 9th Floor
San Francisco, CA 94105
Phone: 415.396.0965
Email: saitol@wellsfargo.com

Anne Simpson, Vice President

Silicon Valley Bank
555 Mission Street, Suite 900
San Francisco, CA 94105
Phone: 415.764.3144
Email: asimpson@svb.com

Dan Wendel, Vice President

Raymond James Tax Credit Funds
Phone: 503.675.3933
Email: Dan.Wendle@RaymondJames.com

VALLEY VIEW SENIOR HOMES

31 THERESA AVENUE, AMERICAN CANYON

COMPLETION DATE

January 201
(anticipated)

TOTAL COST

\$21,000,000

DENSITY

19 units per acre

NUMBER OF UNITS

70 Total

INCOME LEVELS

30% - 60% AMI

ARCHITECT

McCamant Durrett
Architects

GENERAL CONTRACTOR

Midstate Construction

FINANCING PARTNERS

City of American Canyon
HCD VHHP
FHLB AHP
State CDBG
City of Napa Housing
Authority
4% tax credit equity

PROPERTY MANAGER

SAHA PM

SERVICE COORDINATOR

SAHA



SAHA’s American Canyon project presents a special opportunity to realize the City of American Canyon’s goals of creating a senior community that will offer a high level of amenities as well as on-site services for older adults with modest financial means. SAHA proposes to develop approximately 70 cottage-style units on the site, all of which will be affordable to very low and extremely low-income seniors. American Canyon is envisioned as a vibrant community that complements the character of the existing single-family neighborhood while achieving a density that promotes financial feasibility and long-term operational sustainability. The result is a hillside development of charming cottages, centralized parking, meandering paths, active recreation, and a community clubhouse. Residents will enjoy a beautifully landscaped community that incorporates the highest standards of green building and sustainable design as well as a robust selection of on-site services and activities to support wellness, independent living, and aging-in-place.



COMPLETION DATE

March 2013

TOTAL COST

\$17, 00,000

DENSITY

N A

NUMBER OF UNITS

43 Total

INCOME LEVELS

30% - 0% AMI

ARCHITECT

McCamant Durrett

GENERAL CONTRACTOR

Segue Construction

FINANCING PARTNERS

City of Sonoma RDA

County of Sonoma

CTCAC

Silicon Valley Bank

PROPERTY MANAGER

SAHA PM

SERVICE COORDINATOR

La Luz

VALLEY OAK HOMES

875 LYON STREET, SONOMA, CA



Valley Oak Homes is a 43-unit affordable rental project on a 2.07 acre formerly vacant site located in the City of Sonoma. The project is new construction and designed to create a vibrant family community within an environmentally sustainable development. The project serves low to extremely low income families, with incomes at or below 0% Area Median Income.

SAHA prioritized community space for residents by creating a large common open space fronting a clubhouse with a common terrace. The clubhouse acts as the community hub for the seven residential buildings and includes a multipurpose room with a common kitchen, public gathering space, a homework computer room, a tenant services office, and a resident manager office. A community garden and bicycle parking is also included to bring residents together and encourage healthy living.



HARPER CROSSING

313 -3139 HARPER STREET, BERKELEY

COMPLETION DATE

February 2017
(anticipated)

TOTAL COST

\$1 , 00,000

DENSITY

13 units per acre

NUMBER OF UNITS

42 Total- 1 bedroom

INCOME LEVELS

30-60% AMI

ARCHITECT

Kodama Design

GENERAL CONTRACTOR

Cahill Construction

FINANCING PARTNERS

City of Berkeley
County of Alameda—
HOPWA and Boomerang
9% Tax Credits
HCD- IIG and TOD Loan
FHLB AHP

PROPERTY MANAGER

SAHA PM

SERVICE COORDINATOR

SAHA



In 2012 the City of Berkeley selected SAHA to develop this vacant site, which lies within one of the city’s Priority Development Area’s. The four story, wood frame structure will include 9 parking spaces in a podium garage and 42 1-bedroom units of housing for seniors ages 62 and older. The development will include a ground level outdoor and indoor community spaces, as well as an office and community laundry room.

This housing is located with exceptional access to high quality public transportation. In addition to AC Transit bus service and East Bay Paratransit, the Ashby BART station is across the street and provides high frequency, accessible, reliable, and rapid, public transportation.

In addition to transit, the neighborhood offers seniors a wide variety of businesses and services. The Berkeley Bowl (grocery store), the South Berkeley Senior Center, a pharmacy, farmer’s market, and countless restaurants and other neighborhood services are all located within 3 blocks of the station. In addition, the Alta Bates Medical Center is located 6 blocks away. This location has easy access to services in downtown Berkeley and downtown Oakland, as well as San Francisco and the greater bay area through BART.



TOWER PARK

17TH AND G STREETS, MODESTO

COMPLETION DATE

March 2016(anticipated)

TOTAL COST

\$14,900,000

DENSITY

73 units per acre

NUMBER OF UNITS

50 Total

49 1-bedroom

1 2-bedroom

INCOME LEVELS

30-60% AMI

ARCHITECT

Dahlin Group Architects

GENERAL CONTRACTOR

Huff Construct^on

FINANCING PARTNERS

City of Modesto HOME Loan

9% Tax Credits

Wells Fargo

PROPERTY MANAGER

ABHOW

SERVICE COORDINATOR

ABHOW



In 2010, the City of Modesto selected SAHA and ABHOW to partner in developing a city park that contained an old water tower at its center into affordable homes. The development will be a three story, wood frame structure and will include 29 spaces of surface parking. There will be both offices and community spaces on the ground floor.

Senior residents will be well situated and within walking distance from a park, public library, farmer's market and Modest Area Express bus service. Additionally, the site Modesto Senior Citizens Center and the Golden Valley Medical Center are both less than 1 mile away. ABHOW, with additional assistance from other city service providers, will provide on-site resident services to support independent living.



1ST FLOOR/SITE PLAN



PETALUMA AVENUE HOMES

571 Petaluma Avenue Sebastopol, CA 9 472

COMPLETION DATE

February 2009

TOTAL COST

\$17,000,000

DENSITY

17 units acre

NUMBER OF UNITS

45 Total
1 bd, 2 bd, 3 bd

INCOME LEVELS

30- 0% AMI
Family

ARCHITECT

McCamant Durrett

GENERAL CONTRACTOR

Midstate Construction

FINANCING PARTNERS

City of Sebastopol
Sonoma County
9% Tax Credits
FHLB AHP
Silicon Valley Bank

PROPERTY MANAGER

SAHA

SERVICE COORDINATOR

West County Community
Services



This building is the first affordable rental building in Sebastopol in ten years and the first affordable rental cohousing community in the nation. It contains 4 apartments and town homes with rents ranging from \$422 to \$1,171.

Petaluma Avenue Homes was developed using the concept of cohousing, which originated in Denmark in the 1960's. Cohousing is an innovative approach to housing where private homes are clustered around extensive common facilities in a walkable environment. At Petaluma Avenue Homes, cohousing principles are applied in the community garden, common house, and abundant open space, encouraging all residents to come together to build their community.

Green design is also featured prominently. Solar panels reduce external energy use, bioswales collect and filter runoff water to remove pollutants, and recycled materials were used in construction to reduce resource use.



HARMON GARDENS

3240 Sacramento Street, Berkeley , CA 94702

COMPLETION DATE

August 2011

TOTAL COST

\$6,400,000

DENSITY

106 units acre

NUMBER OF UNITS

16 Total

1 Studios 1 2bedroom

INCOME LEVELS

30- 0% AMI

ARCHITECT

HKIT Architects

GENERAL CONTRACTOR

Midstate Construction

FINANCING PARTNERS

City of Berkeley

Alameda County

9% Tax Credits

MHSA

FHLB AHP

Berkeley Housing

Authority

PROPERTY MANAGER

SAHA

SERVICE COORDINATOR

Fred Finch Youth Center

Berkeley Mental Health



Harmon Gardens is home to 1 young adults who are either homeless or at high-risk of homelessness. The property has 16 apartments (1 studios and 1 two-bedroom manager unit) including ten units set-aside for residents challenged by mental illness. The beautifully designed apartments and common areas provide a safe, comfortable, and healthy environment for tenants to adjust to living on their own for the first time. The property management and resident services of ces, backyard garden, laundry facilities, and a community house provide ample space for the high-level of supportive services offered on-site by Fred Finch Youth Center and Berkeley Mental Health.

The building incorporates numerous green building measures and sustainable design features and has achieved an impressive Green Point Rating of 170, a LEED for Homes Platinum rating and served as a pilot for developing the Multi-family High Rise LEED for Homes rating system and the EPA Indoor Air Plus Program. It has also received a Bay Friendly Landscaping certification.



THE ORCHARDS ON FOOTHILL

2719 Foothill Boulevard Oakland, CA 94601

COMPLETION DATE
September 200

TOTAL COST
\$20,000,000

DENSITY
114 units acre

NUMBER OF UNITS
6 Total
1 bedroom

INCOME LEVELS
30- 0% AMI
Seniors

ARCHITECT
Pyatok Architects Inc.

GENERAL CONTRACTOR
H Fitzmaurice, Inc.

FINANCING PARTNERS
City of Oakland
9% Tax Credits
FHLB AHP
Wells Fargo

PROPERTY MANAGER
SAHA

SERVICE COORDINATOR
Toolworks



Located in Oakland’s Lower San Antonio district close to the Fruitvale Transit Village, the Orchards on Foothill transformed vacant industrial land on one of Oakland’s primary transit corridors into 6 apartments for very-low income seniors. The building is well located near services and includes universal design features that are adaptable to residents with disabilities.

The building’s design includes a variety of common interior and outdoor spaces where both casual and organized social activities can take place. The building includes a spacious lobby and mailbox area where residents can wait for transit or sit and enjoy the neighborhood. The Orchards has a large outdoor terrace with seating areas and a variety of fruit trees and native plants. The residents can also plant their own small gardens in the community vegetable beds.

The Orchards includes many green features that enable it to operate efficiently and with limited environmental impact, including photovoltaic solar panels that power the common area energy load. Orchards on Foothill was the 2009 Gold Nugget Merit Winner by the Pacific Coast Builders Association in the Outstanding Affordable Project and Outstanding Senior Community categories.





EVE CARLISLE STEWART

DIRECTOR OF HOUSING DEVELOPMENT

510-809-2754

estewart@sahahomes.org

Eve Stewart has over 14 years experience in real estate finance and development and has been with SAHA over 10 years. During her tenure, Eve has directly managed or overseen the completion of more than 900 housing units, primarily using tax credit financing combined with additional State and local funding programs. Currently, Eve is responsible for 750 units in SAHA's predevelopment pipeline with total costs of \$280 million. Eve serves on of the board of directors of East Bay Housing Organizations (EBHO), a nonprofit advocacy and policy group and serves on the leadership Board of EveryOne Home, Alameda County's initiative to end homelessness. Eve holds a Masters degree in City & Regional Planning from the University of North Carolina and graduated magna cum laude from Harvard University with a Bachelor's degree in Archaeology. She is a Certified Green Building Professional.

PROFESSIONAL EXPERIENCE

2003-present	SAHA / Affordable Housing Associates, Berkeley, CA Director of Housing Development
2000-2003	Economic & Planning Systems, Inc. Senior Associate
2000	Dept. of City & Regional Planning, UNC Teaching Assistant, Real Estate Investment & Affordable Housing Finance (graduate level)

REPRESENTATIVE PROJECTS

The Savoy

101 units | Permanent housing for homeless and special needs; mixed use

Strawberry Creek Lodge

150 units | Senior housing

Ashby Lofts

54 units | Mixed-use family housing

Carmen Avenue Apartments

30 units | Supportive & Special Needs family housing

Harmon Gardens

16 units | Supportive housing units for transition-age youth

University Neighborhood Apartments

27 units | Family & disabled housing

EDUCATION

2000	University of North Carolina at Chapel Hill Master of City & Regional Planning, Real Estate and Housing Development
1995	Harvard University Bachelor of Arts, Archaeology, magna cum laude



DEVIN ELLIN

PROJECT MANAGER

510-809-2772

devine@sahahomes.org

Devin Ellin has over 8 years of experience in real estate development and urban planning. Since joining SAHA in 2013, Devin has been involved in the development of over 250 units of housing representing nearly \$100m in total development costs. Devin holds a master's degree in Urban and Regional Planning with a certificate in Real Estate Development and a Bachelor of Science in Environmental Engineering.

PROFESSIONAL EXPERIENCE

2013-present	SAHA / Affordable Housing Associates, Berkeley, CA Project Manager
2012-2013	Tenderloin Neighborhood Development Corporation, San Francisco, CA Assistant Project Manager
2011-2012	Sustainable Building Advisor Program, San Francisco, CA Head Instructor
2010-2011	Clean Energy Works Oregon Energy Advisor
2007-2010	Earth Consulting Group Inc, Portland, OR Senior Project Manager

REPRESENTATIVE PROJECTS

Lakeside Senior Apartments 92 units Senior & Homeless Housing
Redwood Hill Townhomes 28 units Family housing
Eastside Arts & Housing II 48 units Mixed-use family housing
Robin Lane Apartments 16 units Family & special needs housing

EDUCATION

2009	Masters of Urban and Regional Planning Portland State University
2009	Graduate Certificate in Real Estate Development Portland State University
2000	Bachelors of Science, Environmental Engineering

CERTIFICATIONS

LEED AP, BD + C US Green Building Council (USGBC)
Certified Sustainable Building Advisor Sustainable Building Advisor Institute (SBAi)



SUSAN J. FRIEDLAND

EXECUTIVE DIRECTOR

510-809-2762

sfriedland@sahahomes.org

Susan Friedland was in the Executive Director of Affordable Housing Associates (AHA) starting July of 2004 and became the Executive Director of SAHA when AHA merged with Satellite Housing in 2013. Previously, Susan was with Fifth Avenue Committee (FAC), a community development corporation in Brooklyn, New York, serving as FAC’s Director of Housing Development. The American Planning Association (APA) honored Susan with the national Diana R. Donald Award in 2002, recognizing her efforts to bring high-quality, well-planned, attractive, affordable housing to low-income women and families. Susan serves as an Officer of Nonprofit Housing Organizations of Northern California (NPH) and as a member of Enterprise’ national Leadership Council.

PROFESSIONAL EXPERIENCE

2004-present

SAHA / Affordable Housing Associates, Berkeley, CA

Executive Director

Directs \$8.5 million nonprofit housing development company with 170 employees. Oversees all aspects of affordable housing development and property management of 2607 apartment units. Implements and maintains fiscal oversight of organizational resources. Establishes and maintains personnel policy. Develops and implements organizational business plan. Actively participates in formulating municipal housing policy to implement goals of general and area plans.

1997-2004

Fifth Avenue Committee, Brooklyn, NY

Director of Housing

Managed all aspects of housing development for nonprofit community development corporation, including project concept development, architectural schematic development, financial feasibility assessment, site selection, identification of funding sources, funding application preparation, selection of contractors and architects, coordination with governmental agencies, creation of necessary documents and coordination of loan closing, oversight of construction, and management of rent-up. Directed the development of 15 multi-unit housing and two community facility projects with over \$75 million total capital budget.

1995-1996

U.S. Agency for International Development, Moscow, Russia

Housing Reform Advisor

1994-1995

Urban Planning Consultant, Berkeley, CA

1991-1992

Coro Fellow, Coro Foundation of Northern California, San Francisco, CA

EDUCATION

Masters of City and Regional Planning, University of California at Berkeley

Bachelors of Arts, Urban Studies (Honors Program), Brown University, Phi Beta Kappa, Magna cum laude



53 units	1-3 BRMs unit types	2.0 spaces/unit parking ratio
67,000 square feet	1.2 acres	44 D.U.A
\$9.5M construction cost	2005 completion	



Awards:

Grand Award / Best Mixed Use Project
Gold Nugget {2005}

Merit Award
Builder Magazine {2005}

This project lies at the edge of downtown Palo Alto in a neighborhood that has become known as "Professorville," an affluent residential enclave of classic single family craftsman homes where the median home price was \$1.5 million at the time of construction. The project consists of 53 apartments for low income families in townhomes over flats, above a partial subterranean garage.

The architects facilitated several community meetings to help generate the form, organization and program of this project. The process resulted in buildings that have been very well received by the local homeowners, despite the income and wealth disparities between the new residents and the neighbors.

A historic boarding house was moved to the corner and will be used as the manager's office and a community center. All units have patios or balconies, and several have private porches on the street matching the streetscape of the area. The building was oriented perpendicular to the streets where possible to eliminate the sense of a continuous street wall.



Sara Connor Court, Concord, CA
Affordable Family Housing

57 units	1-4- BRMs unit types	1.7 parking ratio
25,000 square feet	1.85 site area	30 D.U.A
\$12M construction cost	2006 est. completion	



Sara Conner Court is the first GreenPoint Rated affordable housing development in Alameda County; it is a 57-unit affordable family housing site situated within walking distance of the local elementary and middle schools, grocery shopping, a low-cost medical clinic, public parks and AC Transit bus line.

Four buildings are organized around a central courtyard and play area. A taller building comprised of thirty 2- and 3-story, wood-frame townhouse-style units above a concrete parking podium provides a buffer to Mission Blvd. The town homes are organized in groups of six around entry courts that provide intimate outdoor play areas for smaller children. The remaining buildings consist of 1- and 3-bedroom flats at the ground floor and 2-story townhouse-style apartments above. Private patios are oriented towards the main courtyard to encourage interaction among residents. Amenities include a community room and computer learning lab, laundry facilities, play areas, a tot-lot, barbecue and picnic areas.

As a project seeking to further develop green affordable family housing, Sara Conner focused on energy efficiency, healthy landscaping and indoor air quality. Efficient lighting and plumbing fixtures, appliances and heating systems were installed, as well as Bay-friendly landscaping and low-V.O.C. paints, flooring and adhesives.

Villa Del Norte / Rancho Cucamonga, CA
Affordable Family

88 units	3-5 BRMs unit types	2.2 parking ratio
145,000 square feet	8.7 acres	10.1 D.U.A
\$10M construction cost	1995 completion	



Awards:

AIA Merit Award
 AIA - East Bay {1996}

Grand Award
 Builder's Choice Design & Planning Awards
 {1996}

Focus on Affordability Award
 Builder's Choice Design & Planning Awards
 {1996}

Honorable Mention / Excellence in Affordable
 Housing Design
 Fannie Mae Maxwell Awards of Excellence {1997}

Grand Award
 Gold Nugget {1996}

This project is situated on an 8.7 acre parcel adjacent to a large park, and directly across from a middle school. The homes are organized into clusters of six units that front onto an intimate courtyard. Each cluster also has a rear parking court providing access to each attached one-car garage, and to 6-8 covered parking spaces required by the city. Each unit has a front porch, fenced back patio, and balconies for the master bedroom. All of the outdoor open space is distributed into small pedestrian courts as a means to increase security and supervision of public outdoor areas. The circulation within the development follows the tradition of small towns where people walk along the sidewalks adjacent to curbside parallel parking. To enhance this experience the streets are intentionally short and are bent to shorten the streetscape perspective and to slow traffic. The child care center and community meeting buildings are placed at the front of the development, directly across from the middle school.

Vineyard Crossings / American Canyon, CA
Affordable Family Housing

196 units	1-4- BRMs unit types	1.95 parking ratio
163,000 square feet	7.1 site area	27 D.U.A
\$28M construction cost	2007 completion	



Located near downtown American Canyon, about an hour north of the Bay Area, the Vineyard Crossings rental community is an integral part of a larger neighborhood of homeowners. It consists of 145 affordable rental homes for families clustered into smaller social groupings of about 25 families, each smaller grouping with its own courtyard. The pedestrian courts form the heart of the project, incorporating multiple activities to promote social interactions. The courts are enlivened by play areas for young children and sitting areas for adults; most private patios and decks adjoin them as well.

The courtyard clusters are designed such that they screen all parking from the street, yet they welcome visitors with trellised gateways. The community includes a licensed child care center, multi-purpose community room, computer center, exercise room, laundry, and swimming pool. A bike and pedestrian path links the community to the town's nearby core and surrounding areas. The architecture recalls some of the region's 'Craftsman tradition', which allows the three-story, multifamily buildings to comfortably blend with the surrounding two-story single family homes.

Avondale Park / Redmond, WA
Special Needs Housing

61 units	1-4- BRMs unit types	0.81 parking ratio
66,000 square feet	1.5 acres	40.3 D.U.A.
\$6.9M construction cost	2004 completion	



Awards:

Judges Award of Excellence
 Gold Nugget {2006}

Avondale Park provides 61 units of shelter and transitional housing along with community support facilities. The transitional housing is arranged in neighborhood courtyard clusters with individual neighborhood character defined through colors, materials, and landscaping, and a variety of secure child play areas. Through a clear definition between public and private space, the placement of windows/bay windows, the limitation of access points, and dispersed private parking, each of the residents has visual surveillance of the activities of their visitors, children, and automobiles.

Contiguous with the street front and entrance to the site, the nucleus of the Avondale Park community is the 'town square', a group of community facilities and higher density housing surrounding a public auto/pedestrian plaza. Fronting the plaza, a more civic character combines with diverse social gathering spaces, pavement, and landscaping patterns to enhance pedestrian activity in the urban village square. A fabric of circulation and open spaces connects the project to an adjacent city park.



PRINCIPAL IN CHARGE

CURTIS CATON, AIA

Curtis Caton joined Pyatok Architects in 1996 as the Project Architect for the firm’s first venture into designing student housing (the UC Berkeley Albany Village Feasibility Study). He has since led dozens of award-winning residential projects that serve seniors, families, students and those with disabilities and special needs. Curtis is an enthusiastic team player and relishes the opportunity to develop innovative projects that meet the unique requirements of each clients’ program and site with an appropriate economy of means. His expertise in Student Housing and those with special needs and accessible housing has led to speaking engagements at a number of Department of Justice Fair Housing seminars and at San Francisco Planning and Urban Research (SPUR). Curtis leads the student housing studio at Pyatok Architects and oversees the implementation of BIM, using Revit and office Information Systems.

REPRESENTATIVE PROJECTS

THE UNITY COUNCIL, L+M DEVELOPMENT PARTNERS, AND EAST BAY ASIAN LOCAL DEVELOPMENT CORPORATION

Fruitvale Transit Village Phase IIA Affordable Family Housing, Oakland, CA

HABITAT FOR HUMANITY EAST BAY SILICON VALLEY

Central Commons Multi-Family Condominiums, Fremont, CA

NATIONAL CITY REDEVELOPMENT AGENCY AND THE RELATED COMPANIES

Paradise Creek Affordable Family Housing, National City, CA

RICHMOND HOUSING AUTHORITY

Friendship Manor, Richmond, CA

Triangle Court, Richmond, CA

CHRISTIAN CHURCH HOMES & OAKLAND HOUSING AUTHORITY

Harrison Street Affordable Senior Housing, Oakland, CA

EAST BAY ASIAN LOCAL DEVELOPMENT CORPORATION

Seven Directions Affordable Family Housing and Native American Health Center and Dental Clinic, Oakland, CA

RESOURCES FOR COMMUNITY DEVELOPMENT

1701 Martin Luther King Jr. Way Apartments, Oakland, CA

Fox Courts Affordable Family Housing, Oakland, CA

Aspen Courts Apartments, Pacheco, CA

OAKLAND HOUSING AUTHORITY, THE RELATED COMPANIES, & EAST BAY ASIAN LOCAL DEVELOPMENT CORPORATION

Lion Creek Crossings Phase III Affordable Family Housing, Oakland, CA

VOLUNTEERS OF AMERICA

Lord Tennyson Apartments Renovation, Hayward, CA

EDEN HOUSING

Tienda Senior Housing, Lodi, CA

North Richmond Senior Housing, Richmond, CA

Sara Conor Court Family Housing, Hayward, CA

UNIVERSITY OF CALIFORNIA, SANTA CRUZ

Infill Apartments Repair Project, Santa Cruz, CA

UNIVERSITY OF CALIFORNIA, MERCED

The Summits Student Housing Phase III

Feasibility Study for Phase III & IV

UNIVERSITY OF CALIFORNIA, BERKELEY

Bowles Hall Historic Preservation and Renovation, Berkeley, CA

Ida L. Jackson Graduate House, Berkeley, CA

Student Housing Capacity Study at Channing Ellsworth & Anna Head Sites, Berkeley, CA

Southside Housing Feasibility Study, Berkeley, CA

University Village Master Plan & Feasibility Study, Albany, CA

University Village Phase II RFP Consulting Architect

EDUCATION

Bachelor of Environmental Design

University of Colorado, Boulder, CO

AFFILIATIONS

American Institute of Architects

East Bay Housing Organizations

Habitat for Humanity

Society for College & University Planning

Rebuilding Together



CONSULTING PRINCIPAL

PETER WALLER, AIA

For more than 20 years, Peter has been designing and leading projects across the state of California. He has particular expertise in the areas of mixed-use, adaptive re-use, and affordable housing, all with an eye toward creating transit-oriented developments that build more liveable, sustainable communities.

In the design process, Peter focuses his energies on the bigger picture, using his experience in master planning and large-scale urban design to see how all the parts of a community fit together. He especially values the community based design projects which bring out the voices of the neighbors and future residents.

In addition to designing for urban communities, Peter regularly engages in housing issues on a policy level. Peter contributes his insights and perspective to debates over affordable housing and urban development and speaks about the need for transit-oriented development through task forces, speaking engagements, and pro bono projects with EBHO (East Bay Housing Organizations) and NPH (Non-Profit Housing Association of Northern California).

EDUCATION

Master of Architecture
University of California, Berkeley

Bachelor of Architecture
University of California, Berkeley

John K. Branner Traveling Fellowship
Multi-Family Housing in Europe & The Middle East

REGISTRATION

Registered Architect, State of California

SPEAKING ENGAGEMENTS

Affordable Housing in Marin County
NPH/Greenbelt Alliance

Community Participation in Design
"Managing Community Based Design"
NPH Conference

High Density Urban Housing
"High Density Housing and Active Urban Streets"
East Bay AIA

Infill Urban Housing in the Central Valley
Mayor's Institute on City Design

Sustainable Multi-Family Housing Series
American Institute of Architects

AFFILIATIONS

American Institute of Architects
Board Member, East Bay Housing
Organizations

Past Board Member, East Bay Habitat for
Humanity

REPRESENTATIVE PROJECTS

WOOD PARTNERS

2302 Valdez Street, Oakland, CA
226 13th Street, Oakland, CA

**THE UNITY COUNCIL, L+M DEVELOPMENT PARTNERS, AND
EAST BAY ASIAN LOCAL DEVELOPMENT CORPORATION**

Fruitvale Transit Village Phase II, Oakland, CA

URBAN CORE REAL ESTATE DEVELOPMENT

Coliseum Transit Village, Oakland, CA

UNIVERSAL PARAGON CORPORATION

Visitation Valley / Schlage Lock Master Plan Update and PHASE I, San Francisco, CA

CITY OF WALNUT CREEK

West Downtown / Walnut Creek BART Station Area Specific Plan, Walnut Creek, CA

AVALON BAY COMMUNITIES

Avalon DogPatch Market-Rate Housing, San Francisco, CA
Avalon Ocean Avenue Mixed-Use TOD Housing, San Francisco, CA
Avalon Hayes Valley Mixed-Use Infill Housing, San Francisco, CA

EAST BAY ASIAN LOCAL HOUSING DEVELOPMENT CORPORATION

West Grand & Brush Street, Oakland, CA
Swan's Market Mixed Use Development, Oakland, CA

HFH CENTRAL STATION VILLAGE, LLC.

Wood Street Apartments, Oakland, CA

SIGNATURE PROPERTIES, PLEASANTON, CA

Landmark Place Homes. Oakland, CA

AF EVANS

901 Jefferson Street, Oakland, CA
MacDonald Avenue, Oakland, CA

HOUSING AUTHORITY OF THE CITY OF FRESNO

Yosemite Village Hope IV, Fresno, CA
California Avenue Master Plan, Fresno, CA

HOUSING AUTHORITY OF THE CITY AND COUNTY OF SAN BERNADINO

Waterman Gardens Master Plan, San Bernadino, CA

SAN MATEO COUNTY DEPARTMENTS OF HEALTH AND HOUSING

Half Moon Bay Senior Campus, Half Moon Bay, CA

UNIVERSITY OF CALIFORNIA, BERKELEY

Channing Bodwitch Residence Hall, Berkeley, CA University Village at Albany



**PROJECT ARCHITECT / MANAGER
ASSOCIATE**

THERESA BALLARD DIAS, AIA, LEED AP

Theresa brings over 14 years of experience with various residential communities and strong design and technical skills. Theresa effectively navigates the regulatory world surrounding housing development through proactive communication from the start of every project. Her proven track record for mapping municipal approvals in advance is based upon early interaction and relationship building. She builds an environment of success by establishing contacts and soliciting initial guidance from cities, counties, fire marshals, commissions, and funders. Primarily focused on wood-frame structures, her special focus is on low to mid-rise multi-unit housing. She manages both new construction and renovation, providing an informed appreciation not just of how buildings are built, but also how they fail. Past projects have included a wide range of end-users, including senior assisted living, homeowners, and even formerly homeless – each requiring discernment of particular user needs and priorities. She is the Project Architect for the renovation of Bowles Hall, an historic dormitory building on the UC Berkeley campus. For each, Theresa balances technical knowledge with creative solutions for creating community among distinctive resident groups.

EDUCATION

Bachelor of Architecture
California Polytechnic State University
San Luis Obispo

REGISTRATION

Registered Architect, State of California

AFFILIATIONS

American Institute of Architects
Planning Commissioner - City of Newark, CA
Board of Directors - Adobe Services and Allied
Housing in Fremont, CA
Green Affordable Housing Coalition

REPRESENTATIVE PROJECTS

RELATED CA AND EAST BAY ASIAN DEVELOPMENT CORP.

Lion Creek Crossings Phase IV, Oakland, CA

EDEN HOUSING

The Altheim Phase II Senior Housing, Oakland, CA
Samara Terrace Affordable Family Housing, Hercules, CA
Leidig Court Homes Rehab, Hayward, CA

SANTA CRUZ COUNSELING CENTER

Grace Commons Special Needs Housing, Santa Cruz, CA

MIDPEN HOUSING

Laguna Commons, Fremont, CA
Garland Plaza Apartments, Sunnyvale, CA

SATELLITE AFFORDABLE HOUSING ASSOCIATES

Orchards on Foothill Senior Housing, Oakland, CA

RELATED CA

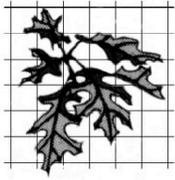
Agnes Memorial Studios, Oakland, CA

UNIVERSITY OF CALIFORNIA, BERKELEY

University Village Master Plan & Feasibility Study, Albany, CA

EDUCATION REALTY TRUST / BOWLES HALL FOUNDATION

Bowles Hall Residential College, University of California, Berkeley, CA



LORI CAGWIN R.I.A. #3103
LANDSCAPE ARCHITECTURE
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lori@loricagwin.com www.loricagwin.com



Lori Cagwin Principal Landscape Architect

With over 35 years of experience, Ms. Cagwin has provided Landscape Architectural services throughout the Bay Area in site planning and landscape development of parks, schools, multi unit residential subdivisions, inns, wineries, commercial properties, and residential estates. She is an experienced professional with a broad range of expertise in Layout and Construction, Grading and Drainage, Planting, Irrigation, Lighting, Construction Detailing, Cost Estimating, Value Engineering, Bid Administration, and Project Management. She has led and managed multidiscipline teams on numerous commercial, residential and residential projects from conceptual through final design and construction. She has been involved in LEED certification projects, and dedicated to restoration of native habitats, historical preservation, community involvement, Xeriscape principals for both plant material and irrigation system development.

EDUCATION:

- 1976 **Leo Marchutz School of Landscape Painting & Drawing**, Aix-en-Provence, France
1978 **BA Landscape Architecture**, College of Environmental Design,
University of California, Berkeley, CA

TEACHING:

- 1983- **Associate Instructor UC Berkeley Extension Landscape Architecture Certification**
1985 **Program:**
- Plant Materials, Principles of Design
- 1983- **Program Lecturer, California Garden Clubs**
1985 **Landscape Design Study Courses:**
- Plant Materials, Principles of Landscape Design, History of Landscape Architecture
- 2010-
2014 **Lecturer, Water Wise Gardening Workshop**, City of Napa & Town of Yountville
- 'Perfect Plant Pics', 'Drought Tolerant Planting Alternatives to Turf'

LICENSES:

- 1989 **California Registered Landscape Architect California - #3103**
1991 Certification, **Landscape Irrigation Auditor**, Cal Poly, CA
2010 Certification, **Qualified Bay-Friendly Landscape Maintenance Professional**, Napa CA

ASSOCIATIONS:

- 1994-7 **Chairman**, Redwood Empire Chapter, American Society of Landscape Architects
1989- **Member**, North Coast Chapter, American Society of Landscape Architects
1994-7 **Landscape Architect**, Sebastopol Design Review Board, Sebastopol, CA7
1997 **Member**, California Native Plant Society, Sonoma County Chapter
2009- **Member**, California Native Plant Society, Napa County Chapter
2009 **Member**, Future Visioning of Urban Landscapes – Sustainability Forum

AWARDS :

- *CLCA Award 1986 –'Xeriscape' - Rancho Caymus Inn, Rutherford, CA*
- *CLCA Award 1987 -'Renovation' – Sonoma Mission Inn- Sonoma, CA*
- *State Senate Certificate of Appreciation 1994 – Fircrest Memorial Rose Garden*

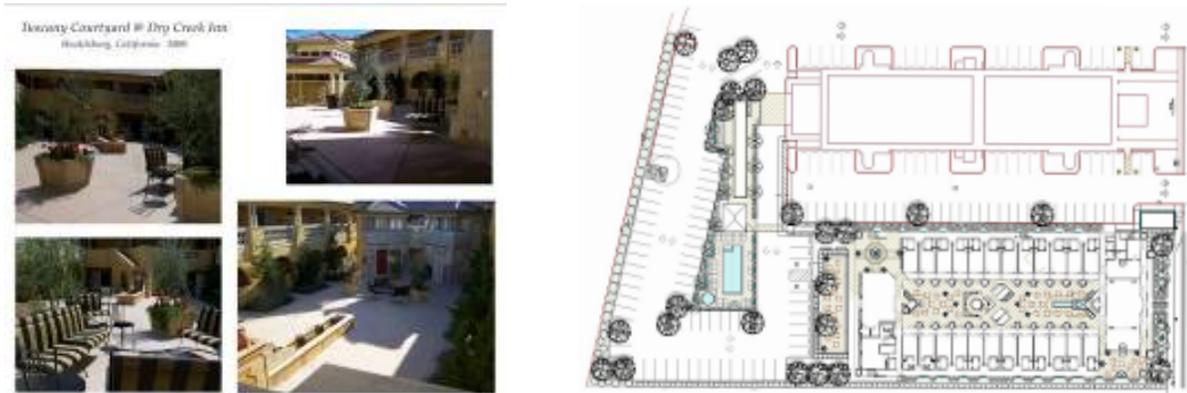
VALLEY OAK HOMES, SONOMA, CA:

Lori Cagwin Landscape Architecture provided Conceptual through Construction Documents for this affordable Housing project in Sonoma implementing sustainable practices inclusive of bioswales, permeable and local, natural paving, native, habitat and edible landscaping, drip and gray water irrigation, and LED lighting systems.



**DRY CREEK INN RENOVATION AND KRUG CONVENTION CENTER,
HEALDSBURG, CALIFORNIA:**

Lori Cagwin Landscape Architecture provided Conceptual Design, Cost Estimates, Contract Documents, Bid Administration, and Project Management for the renovation of Dry Creek Inn and addition of Krug Convention Center. Improvements include renovation of vehicular and pedestrian circulation, replanting of Mediterranean plant palette, renovated low water use irrigation, pool and spa layout, and courtyard development, and maintenance guidelines. Attention was given to water retention systems and bioswales. Worked with client, contractors, architect, engineer, and planners to develop successful project approval and completion.



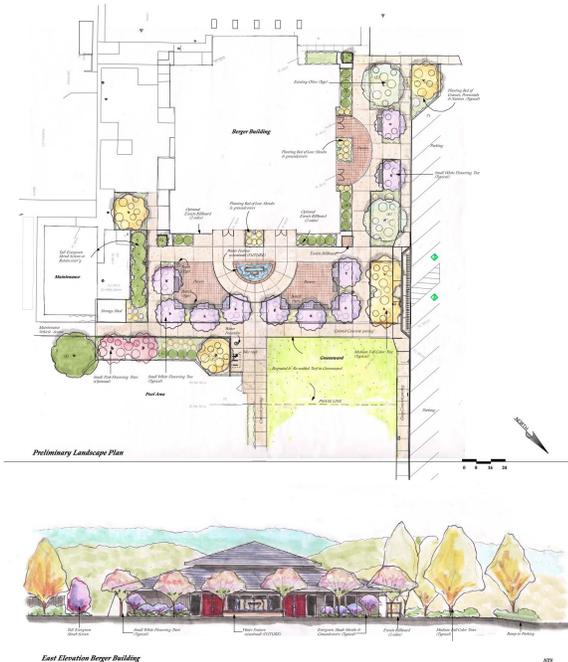
VINEYARD OAKS LEED SUBDIVISION, YOUNTVILLE, CALIFORNIA:

Lori Cagwin Landscape Architecture provided Conceptual and Preliminary Landscape Design Development for frontage vehicular and pedestrian path systems, Bioswales, Planting, Irrigation and Lighting, implementing LEED sustainable concepts and requirements. Coordinated mitigation for heritage oaks with arborist. Worked with client, contractor, architect, planners to develop successful project approval. Presented work to ZDRB and Town Council.



OAKMONT VILLAGE CENTRAL PLAZA PROJECT , SANTA ROSA, CALIFORNIA:

Lori Cagwin Landscape Architecture provided Conceptual Design, Cost Estimates, Contract Documents and Project Management for the renovation of an existing and damaged concrete courtyard surrounding the Berger Building inclusive of planting, irrigation, site amenities and hardscape improvements. Design development was developed with the Facilities and Landscape Improvement Committees, and coordinated with Civil, lighting and structural engineers. Adjoining Pickleball and Sports Courts and a Horticultural Demonstration Garden development are currently in process.



SEQUOIA GROVE WINERY, RUTHERFORD, CA:

Lori Cagwin Landscape Architecture provided Conceptual Design, Cost Estimates, Contract Documents, Bid Administration, and Project Management for the renovation and development of this historic winery in the Napa Valley. Scope included development of gravel paths for circulation, interlock paver reuse for large events, lawn and sitting areas for daily wine tasting, a fountain to mitigate road noise, screening to separate parking, and planting improvements to tie into the existing planting palette.

