

BURLINGAME ARTS COLONY

META HOUSING CORPORATION

RESPONSE TO THE CITY OF BURLINGAME
Request for Proposal



David Baker Architects
dbarchitect.com



Submitted: **January 30, 2015**

January 30, 2015

William Meeker, Community Development Director
City of Burlingame
501 Primrose Road
Burlingame, California 94010



Meta Housing Corporation

RE: Downtown Burlingame Affordable Housing Development Opportunity

Dear Mr. Meeker:

Meta Housing Corporation ("Meta") is excited to present the enclosed proposal to develop the Burlingame Arts Colony ("BAC") on Lots F and N in Downtown Burlingame. As you will see in this proposal, our team is uniquely qualified to build this project and meet the City's goal of providing affordable housing and replacement parking, having successfully completed similar projects across California.

By way of introduction, Meta is proud to be one of California's most experienced and trusted developers of affordable and mixed-income apartment communities. Since 1995, our team has built one of the industry's most successful track records, developing more than 5,500 residential units. Our bottom-line business acumen, strong sense of social advocacy, and passion for innovation enable us to sustain strong relationships with public and private partners and to develop award-winning projects. Having already developed award-winning Arts Colonies in Burbank, North Hollywood, Long Beach, Glendale, and San Pedro, we look forward to our next in Burlingame.

The proposed BAC will be a LEED-Platinum certified affordable housing project with iconic design and plentiful community facilities. It will include the construction and delivery to the City of a five-story parking structure that will replace the existing parking and additionally provide up to 73 additional parking spaces. The structure will be lined by apartments along Park Road to maintain the attractiveness of the block. BAC will transform an underused surface lot into a beautiful, thriving housing community richly supporting the creation, display, and promotion of arts of all types and the continued health and growth of the residents and the community.

We propose two financing options: a 9% tax credit scenario that lowers the City contribution but is subject to competition for tax credits; and a 4% tax credit scenario with a higher City contribution but with complete certainty of execution. Both plans and various innovative financing strategies are discussed in detail within the proposal, but the primary differentiators between the options are summarized as follows:

Option	Total Units	Total Parking Spaces in Lot F Structure (Public)	Total Parking Spaces in Lot N (Private)	City Contribution to Lot F Structure (EIFD or other)	Competitive Tax Credits
4%	71	273	82	\$4,566,000	No
9%	66	252	82	\$2,400,000	Yes

Our financing plan is both practical and achievable, and our qualifications reinforce our dedication to successful projects. We are confident in our ability to make this project a success, and look forward to discussing with you further. Please contact me at your convenience at (310) 575-3543 x109 or amandel@metahousing.com at any time to discuss in greater detail the contents of the enclosed proposal. Thank you for your consideration..

Sincerely,

Aaron Mandel, Senior Vice President
Meta Housing Corporation

BURLINGAME ARTS COLONY RFP

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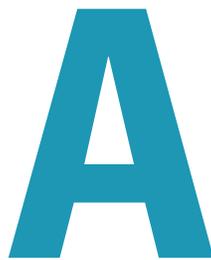
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EXPERIENCE



Developer Experience

Provide information regarding your firm's professional experience. Identify similar projects that it has worked on, particularly any projects developed within California or the San Francisco Bay Area. Describe how the firm is organized and how its resources will be utilized for the project, including identifying the individuals that would be involved with the development of the project, any partners or sub-consultants, and their experience with this kind of project. In addition, identify any other projects the firm is working on at the current time and its level of completion and anticipated timeline.

Meta Housing Corporation



John M. Huskey, Meta's Chief Executive Officer

Address: 1640 S. Sepulveda Blvd.
Suite 425, Los Angeles, CA 90025
Phone: (310) 575-3543
Entity Type: California Corporation
Date of Formation: 1993 (20+ years in business)
Size of Business: 18 employees

Members of the Professional Team

- John M. Huskey, Chief Executive Officer
- George Russo, Chief Financial Officer
- Kasey Burke, President
- Christopher Maffris, Senior Vice President
- Aaron Mandel, Senior Vice President

Principal Project Contact

- Aaron Mandel
- (310) 575-3543 x109 / amandel@metahousing.com

About

Meta is one of California's most experienced and trusted developers of senior and multifamily affordable communities. The Meta team has been active in the financing, construction, and management of affordable housing since 1969, and has developed more than 12,000 units. Meta combines solid financial resources and thoughtful design that enable life-enhancing activities and social services, to thrive in affordable and market-rate multi-family and senior communities alike. Truly Meta's projects are unique in the level to which they actively engage their tenants in activities such as tutoring, wellness, and art. This innovative approach

has consistently won national recognition including the National Association of Home Builders' 50+ Housing Gold Achievement award, PCBC Gold Nugget Award and the SAGE Award. The National Endowment for the Arts has recognized Meta's Burbank Senior Artists Colony as one of the finest examples of the incorporation of services, education and activities with architecture.

Meta works closely with city and community leaders, a variety of local and state housing agencies, and community-based non-profits that are often in the best position to determine which solutions will work best for a community. Community outreach is done, and when needed, Meta has been responsive with design changes, greater setbacks, additional parking, etc.

Meta's Varied Housing Types			
Total Completed or Under Construction			
Type	Projects	Units	Cost (\$MM)
Senior	38	4829	\$905
Family	22	1455	\$495
Mixed Income	4	980	\$187
TOD's	5	489	\$110
Arts Colonies	5	547	\$139
Planned Comm.	2	429	\$91

Superior Leveraging Ability

Meta has a superior track record of accessing and leveraging housing funds and managing financially complex developments. Since 1993, Meta has leveraged \$500 million of private tax credit investments to build 6,000 units of housing. Meta projects have secured 9% tax credits each year since 2003. Of our completed projects, almost half were funded with competitive 9% tax credits.

Day-To-Day Project Management

Meta will provide any and all internal and external personnel needed to develop and operate entity of each affordable housing each phase of the Development. Sr. Project Manager Tim Soule will have day-to-day responsibilities for the development of the project, with the assistance of Frannie Hemmelgarn as Assistant Project Manager, and Meta's entire accounting staff. Aaron Mandel and Chris Maffris will regularly oversee the development's progress. Once placed-in-service, Meta's Asset Management team will oversee project operations and maintenance.

Collaboration

Meta's team has been infusing vibrancy, inspiring community, and supporting individuals since 1969. Each Meta community provides the highest quality of life possible, integrating innovative design concepts with life-enhancing features that make a significant impact on the lives of our residents. Our bottom-line business acumen, strong sense of social advocacy, and interest in innovation enable us to sustain strong relationships with public and private partners and to continually develop award-winning projects.

Meta's foray into arts housing is the culmination of years of collaboration between Meta's CEO John M. Huskey, and EngAGE's founder Tim Carpenter. Mr. Huskey has long been committed to building communities that encourage and enhance third-party service providers' programs so that residents can live more fully-engaged lives. He also fully embraces the work of so many Angelinos. Mr. Huskey says, "We find that service programs that work best are the ones that have complexity... We went to cities in Los Angeles County like Culver City, Santa Monica, and Burbank and said, if Detroit can build housing for [people] that used to work in the auto industry, and Pittsburgh for people who worked in steel and coal, what's wrong with building communities for those that work in the motion picture industry." Tim Carpenter has a background in both primary care centers for seniors and the arts. Carpenter and Huskey began to talk about combining what each

other was doing. Though Mr. Carpenter started by teaching writing to seniors at one Meta project, the program soon expanded to more buildings, intergenerational classes, and a broad array of arts programming. EngAGE now brings arts training, wellness programs, and computer and other classes to twenty-nine (29) building in the Los Angeles area, and will add another six over the next year.

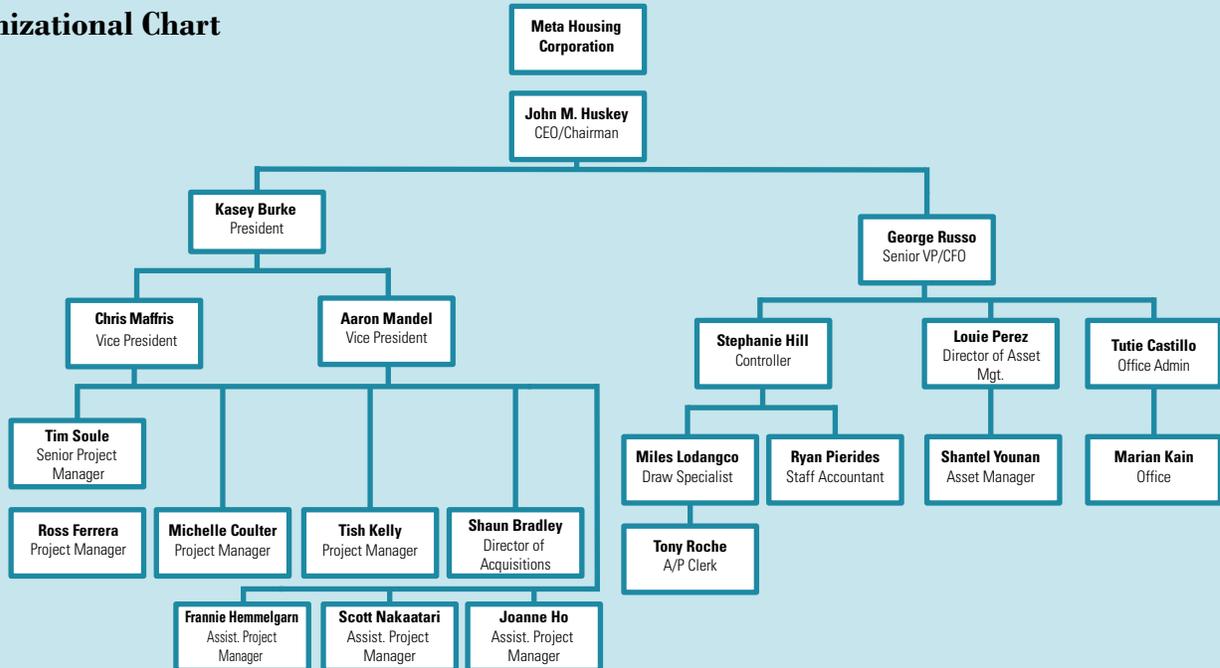
Meta's extensive experience and 35 years of developing affordable housing demonstrate its financial and organizational capability, with construction management, and ongoing management and compliance. Meta will provide any and all internal and external personnel needed to develop and operate the Burlingame Arts Colony Site. Additionally, the development team, including, David Baker Architects, KKG Inc. and Davis Energy Group all have extensive experience in the design, development and operations of high quality affordable housing projects.

Meta approaches every development as a partnership with the city and community. Our goal is to shape projects that are not only successful as stand-alone endeavors but that also contribute as true assets to the community. As such, we welcome the City and community of Burlingame Arts Colony Site involvement in any and all steps of the development process.

A detailed description of the Project Team, including Meta Housing, its staff, recent projects and financial and organizational capability can be found in their respective sections of this book.



i. Organizational Chart



ii. Directors & Officers

The following individuals from Meta Housing Corporation have the authority to make legally binding commitments for the development entity:

- » **John M. Huskey**, CEO, 100% ownership & directorship
- » **George Russo**, Chief Financial Officer
- » **Kasey Burke**, President
- » **Christopher Maffris**, Senior Vice President
- » **Aaron Mandel**, Senior Vice President

iii. Resumes of Key Personnel

John M. Huskey, CEO, has successfully pioneered cooperative development among non-profit and for-profit enterprises since 1988. Mr. Huskey has been active in financing, development, construction and management of affordable apartment communities since 1969. Mr. Huskey current serves on the City of Los Angeles Mixed Income Housing Policy committee under Mayor Eric Garcetti In 1996, Mr. Huskey was honored by the Building Industry Association Senior Housing Council as its SAGE award winner for outstanding contributions

to senior housing. A frequent speaker, writer, and guest lecturer on development and transportation issues at UCLA, USC, Pepperdine University as well as industry groups, Mr. Huskey has served as a technical advisor to the Los Angeles County Housing Authority as well as San Bernardino County. He also served two terms on the Loan and Grant Committee for the State of California Department of Housing and Community Development. He was an appointee of Mayor James Hahn to the \$100 Million Housing Trust Fund Advisory Committee.

Previously, Mr. Huskey was President and Chief Executive Officer of Calmark Properties Inc. a nationally recognized builder/developer/operator of residential and commercial properties and a leading producer of affordable non-federally subsidized rental housing for seniors. Under his direction, Mr. Huskey helped create the independent senior housing category with the acclaimed Heritage Park program of affordable apartment communities for active, seniors. More than 6,000 units were built throughout the western U.S. taking Calmark Properties from start-up enterprise to market leader in less than five years.

John Huskey attended the University of Notre Dame and Sophia University in Tokyo.

George Russo, Senior Vice President and Chief Financial Officer, started at Meta in 2003. His responsibilities include all aspects of financial, tax and asset management reporting for Meta and its family of affiliated partnerships, limited liability companies and corporations. Mr. Russo also oversees relationships with lenders and other financial partners and stakeholders.

Mr. Russo has 24 years of experience in real estate finance, accounting, and taxation. Prior to joining Meta, Mr. Russo was controller at three separate organizations, Storage World, L.P., Kaufman & Broad Multi-Housing Group, and Public Storage Inc. Mr. Russo earned a Bachelor of Science degree in Business Administration and Accounting from California State University, Los Angeles and holds an NASD Series 28 Registration.

Kasey M. Burke, President, manages all facets of Meta's Real Estate Development Company. Since joining the firm in 2001, he has managed significant projects in the areas of site acquisition, entitlement processing, financing, design development, construction, and lease-up. Mr. Burke specializes in securing funds from federal, state and municipal sources and oversees all of Meta Housing's tax credit and bond application processes.

Mr. Burke graduated from the University of Southern California with an emphasis in Real Estate Finance. He is a licensed Real Estate Broker with the State of California.

Aaron Mandel, Senior Vice President, joined Meta Housing Corporation in 2004, where he manages all aspects of development projects. Responsibilities include land acquisition and business development, securing of city entitlements, structuring and securing project financing, design development, construction monitoring, and lease-up activities.

Mr. Mandel has extensive experience in infill, mixed use, and transit oriented developments, and deep expertise leveraging tax credits and other public subsidies, and in complex layered financing. While at Meta, Mr. Mandel has supervised the financing and development of over 1,100 apartment units.

Mr. Mandel received a degree in International Relations with a minor in Economics from Pomona College in Claremont, CA, where he played on the varsity soccer team.

Chris Maffris, Senior Vice President, is a real estate

development specialist with more than a decade of industry experience.

As Vice President for Meta Housing, Maffris specializes in urban center infill and revitalization projects, and oversees the site acquisition, entitlement, construction management and financing of various projects. During his tenure with Meta, Maffris has successfully supervised the financing and development of more than 2,000 apartment units and 25,000 square feet of commercial space.

As a recognized expert in affordable housing finance, Maffris has been invited to speak at numerous industry forums, including California Association of Local Housing Finance Agencies, Novogradac, SCANPH, ULI and California Redevelopment Association conferences.

Prior to joining Meta Housing, Maffris worked with Leonard & Ohren as a commercial real estate broker. He earned a degree in Economics with a Minor in Computer Science from the University of California, Los Angeles (UCLA) and holds a California Real Estate Salesperson License.

Tim Soule, Senior Project Manager Tim Soule specializes in real estate development, with deep expertise in site acquisition, entitlement, construction management, and financing through local and state housing sources.

As Senior Project Manager focuses on urban center infill and transit-oriented revitalization projects, guiding the origination and development of these properties throughout California. During his tenure with Meta Housing, he has supervised the financing and development of more than 1000 apartment units.

During his career, Soule served as Project Manager for The Angeles Community Design Center (Abode Communities), and also served as Vice President, Loan Origination for the California Community Reinvestment Corporation.

Soule holds an M.B.A. with a concentration in Real Estate and Entrepreneurial Finance from The Anderson School at the University of California, Los Angeles (UCLA). He also earned a Bachelor of Science in Managerial Economics from the University of California, Davis.

Current Developments in Predevelopment and Construction

Project	Address	City	Zip	Units	Status	Construction Completion Date
Winnetka Senior Apartments	20750 Sherman Way	Winnetka	91303	95	Predev	3/2016
Civic Center - Oakland	632 14th Street	Oakland	94612	40	Predev	TBD
Buckingham phase II	Buckingham Road	Los Angeles	90008	110	Predev	TBD
5400 Hollywood	5400 Hollywood Blvd	Los Angeles	90027	40	Predev	9/2016
Downtown Hayward Sr. Apts.	782-038 A Street	Hayward	94541	60	Predev	TBD
Washington Metro	732 E. Washington Blvd	Los Angeles	90021	55	Predev	9/2016
Landmark Lofts	1801 W Capitol Avenue	West Sacramento	95691	64	Predev	6/2016
Glendale Arts Colony	121 N Kenwood Street	Glendale	91206	69	Construction	7/2016
Pacific Avenue Arts Colony	303 South Pacific Ave	San Pedro	90731	49	Construction	3/2014
Cabrillo Family Apartments	1640 Cabrillo St	Torrance	90501	44	Construction	3/2015
Long Beach & 21st	2114 Long Beach Blvd.	Long Beach	90813	41	Construction	6/2015
Vernon Village Park	4601 E 52nd Drive	Vernon	90058	45	Construction	6/2015
Compton Senior Apartments	201 N Tamarind	Compton	90220	75	Construction	6/2016
The Arroyo at Baker Ranch	26000 Rancho Parkway South	Lake Forest	92630	189	Construction	2/1/2015

Developer Track Record

Senior Developments

	DEVELOPMENT	LOCATION	UNITS	COMPLETED	COST (\$M)	PRODUCT	STATUS
01	Andalucia Senior Apartments	Los Angeles	94	2010	\$32.0	Affordable	C
02	Asturias Senior Apartments	Los Angeles	81	2009	\$29.0	Affordable	C
03	Burbank Senior Artist Colony	Burbank	141	2005	\$24.0	Market Rate*	C
04	Cantabria Senior Apartments	Los Angeles	69	2009	\$24.0	Affordable	C
05	Cortina d' Arroyo Grande	Arroyo Grande	108	2006	\$25.0	Affordable	C
06	Dorado Senior Apartments	Buena Park	156	2007	\$32.0	Affordable	C
07	Heritage Park - Duarte	Duarte	120	1997	\$8.0	Affordable	C
08	Hollydale Senior Apartments	South Gate	101	2010	\$25.0	Affordable	C
09	Jasmine at Founders Village	Fountain Valley	156	2005	\$30.0	Affordable	C
10	Magnolia Highland	San Bernardino	80	2011	\$20.0	Affordable	C
11	Park Plaza Sr. Apts.	N Hollywood	203	2001	\$21.0	Affordable	C
12	Sterling Court	Anaheim	34	2002	\$6.0	Affordable	C
13	The Grove	Garden Grove	85	2007	\$17.0	Affordable	C
14	The Piedmont	N Hollywood	198	2002	\$27.0	Mixed Income*	C
15	Compton Senior Apartments	Compton	75	2013	\$19.0	Affordable	C
16	Long Beach and 21st Apartments	Long Beach	49	2011	\$50.0	Affordable	UC
17	Long Beach and Anaheim Phase II	Long Beach	156	2014	\$50.0	Mixed Income*	PD
18	Lugo Senior Apartments	San Bernardino	119	2013	\$19.0	Affordable	C
19	San Clemente Senior Apartments	San Clemente	76	2013	\$24.0	Affordable	C
20	Casa Pacifica	Santa Ana	60	1998	\$4.5	Affordable	S
21	Cedar Villas	Ontario	137	2001	\$7.0	Affordable	S
22	Heritage Park - Anaheim	Anaheim	94	1999	\$4.5	Affordable	S
23	Hillside Park Sr. Apts.	Hemet	177	1998	\$8.0	Affordable	S
24	Pacific Villas	Pomona	132	2001	\$8.6	Affordable	S
25	Rosewood Park	Commerce	94	1999	\$6.6	Affordable	S
26	Valley Village Sr. Apts.	N Hollywood	188	1996	\$16.7	Affordable	S
27	Villa Azusa	Azusa	147	2001	\$8.0	Affordable	S
28	5555 Hollywood	Hollywood	120	2012	\$44.0	Affordable	C
29	Buckingham Senior Apartments	Hollywood	70	2011	\$28.0	Affordable	C
30	Chinatown Metro Apartments	Los Angeles	123	2011	\$50.0	Affordable	C
31	Coventry Court Senior Apartments	Tustin	240	2012	\$45.0	Mixed Income*	C
32	Figueroa Senior Housing	Los Angeles	35	2012	\$10.0	Affordable	C
33	La Coruna Senior Apartments	Los Angeles	87	2012	\$26.0	Affordable	C
34	Long Beach Senior Arts Colony	Long Beach	200	2012	\$70.0	Affordable	C
35	North Hollywood Senior Arts Colony	N Hollywood	126	2012	\$40.5	Mixed Income*	C
36	Tavarua Senior Apartments	Carlsbad	50	2013	\$17.0	Affordable	C
37	Oakland 34	Oakland	33	2014	\$9.0	Affordable	C
38	Compton Senior Apartments	Compton	75	2015	\$19.4	Affordable	C

Family Developments

		LOCATION	UNITS	COMPLETED	COST (\$MM)	PRODUCT	STATUS
01	Adams & Central Mixed Use	Los Angeles	80	2010	\$40.0	Affordable	C
02	Belmont Station Apartments	Los Angeles	275	2008	\$75.0	Market Rate*	C
03	Clinton Family Apartments	Los Angeles	36	2008	\$13.0	Affordable	C
04	Coronita Family Apartments	Los Angeles	21	2007	\$8.0	Affordable	C
05	El Dorado Family Apartments	Sylmar	60	2008	\$24.0	Affordable	C
06	Emerald Terrace Apartments	Los Angeles	85	2007	\$25.0	Affordable	C
07	Long Beach & Burnett Apartments	Long Beach	46	2010	\$20.0	Market Rate*	C
08	Pico/Gramercy Apartments	Los Angeles	71	2007	\$16.4	Affordable	C
09	Sichel Family Apartments	Los Angeles	37	2008	\$13.0	Affordable	C
10	Union Point Family Apartments	Los Angeles	21	2008	\$8.0	Affordable	C
11	Yorba Linda Family Apartments	Yorba Linda	44	2006	\$11.4	Affordable	C
12	The Grove at Sunset Court	Brentwood	54	2013	\$18.0	Affordable	C
13	Tobias Terrace Apartments	Panorama City	56	2013	\$18.0	Affordable	UC
14	Sherman Village Apartments	Reseda	73	2012	\$24.5	Affordable	C
15	Vermont Avenue Apartments	Los Angeles	49	2012	\$20.0	Affordable	C
16	Vernon Family Apartments	Vernon	45	2014	\$15.0	Affordable	UC
17	Pacific Avenue Arts Colony	San Pedro	49	2014	\$18.9	Affordable	UC
18	Torrance	Torrance	44	2013	\$15.5	Affordable	UC
19	5400 Hollywood	Los Angeles	40	2017	\$21.6	Affordable	PD
20	Baker Ranch	Lake Forest	189	2015	\$46.2	Affordable	UC
21	Washington TOD	Los Angeles	40	2017	\$24.4	Affordable	PD
22	Civic Center	Oakland	40	2017	\$18.8	Affordable	PD

Rehab Developments

	DEVELOPMENT	LOCATION	UNITS	COMPLETED	COST (\$MM)	PRODUCT	STATUS
01	Casa Pacifica Senior Apts.	Santa Ana	60	1998	\$4.5	Affordable	S
02	Cedar Village Apts.	Ontario	137	1990	\$7.2	Affordable	S
03	Heritage Park - Duarte	Duarte	120	1997	\$7.5	Affordable	S
04	Hillside Park Senior Apts.	Hemet	177	1998	\$8.0	Affordable	S
05	Pomona Village Apts.	Pomona	132	1990	\$8.6	Affordable	S
06	Rosewood Park - Commerce	Commerce	94	1999	\$6.0	Affordable	S
07	Villas of Azusa	Azusa	147	1990	\$8.0	Affordable	S
08	Lugo Senior Apartments	San Bernardino	119	2013	\$15.0	Affordable	C

Key

NOTATION	DEFINITION / NOTES
*Market Rate	<i>Projects have a 20% affordable housing requirement</i>
C	<i>Completed</i>
UC	<i>Under Construction</i>
PD	<i>Pre-Development</i>
S	<i>Sold</i>

B

Experience Developing Arts Colonies

Arts Colonies Experience

Meta has built three senior arts colonies and is in construction on two family arts colony. These arts colonies include:

- 1. **Burbank Seniors Arts Colony** – 141 units
- 2. **North Hollywood (NoHo) Senior Arts Colony** – 126 units
- 3. **Long Beach Senior Arts Colony** – 161 units
- 4. **Pacific Avenue Family Arts Colony** – 49 units
- 5. **Glendale Arts Colony**- 69 units



Meta's Arts Colonies Experience

Meta Housing Corporation ("Meta") builds well-managed, quality communities that are financially and environmentally sustainable, and customized to their urban contexts.

Meta's Art Colonies support and encourage imaginative thinking and meaningful creative achievement. Our arts colony concept is achieved through EngAGE's award-winning tenant services, arts-related amenities, thoughtful architecture, and in some cases an artist-focused tenant selection process.

1st Generation has *Arts-Focused Engagement and Services*

Meta's foray into arts housing is the culmination of years of collaboration between Meta's President John M. Huskey, and EngAGE's founder Tim Carpenter. Mr. Huskey has long been committed to building communities where tenants can live more fully-engaged lives. Tim Carpenter has a background in both primary care centers for seniors and the arts. The result is the National Endowment for Arts naming EngAGE an Exemplary Program for Best Practices in Lifelong Learning.

Name	Population	Units	Affordability	Financing	Operations	Amenities
Burbank	Seniors with Interest in Arts	141	Mixed Income 30% Affordable	Bonds 4% TCAC CRA/LA	2005	Tenant Services by EngAGE 34-seat Theater Art Studios Film & Editing Bay Creative & Screen Writing Classes
Long Beach	Seniors with Interest in Arts	161	100% Affordable	Bonds 4% TCAC CA HCD City	2012	Tenant Services by EngAGE Playhouse Art Studios Audio/Visual Studio Creative & Screen Writing Classes

2nd Generation Adds *Arts Space for Community At Large*

Name	Population	Units	Affordability	Financing	Operations	Amenities
NoHo	Seniors with Interest in Arts	126	Mixed Income 20% Affordable	Bonds 4% TCAC	2012	Project located within NoHo Arts District. Includes 76-Seat Professional Theater with four (4) annual productions by ROAD Theater Company. Tenant Services by EngAGE.

3rd Generation Adds *Housing for Working Artists and Place-making*

H.R. 3221, also known as the Housing and Economic Recovery Act of 2008, confirms the right of developers to use federal Low Income Housing Tax Credits to finance affordable housing targeted to certain specified groups – including artists. However, this law may be changed in the very near future.

Name	Population	Units	Affordability	Financing	Operations	Amenities
Pacific Avenue	Families, Working Artists (as supported by tax records)	100% Aff.	Mixed Income 30% Affordable	9% TCAC City CRA/LA	Anticipated late 2014	Expands Footprint of San Pedro Arts, Community, and Entertainment District. Includes Six Joint Live/Work Units and 2,940 sf Public Gallery. Linked to Monthly Art Walk. Tenant Services by EngAGE.
Glendale	Families, Working Artists (as supported by tax records)	100% Aff.	100% Affordable	9% TCAC City	Anticipated 2016	Provides iconic arts-related entry to new Glendale Arts & Entertainment District. Includes 1030 sf Public Gallery, Sculpture Garden, Rehearsal Rooms, Mess Lab, Tool Rental, Spray Box Tenant Services by EngAGE.

C

Developer Project Examples

Developer Project Examples

Meta's team has been infusing vibrancy, inspiring community, and supporting individuals since 1969. Each Meta community provides the highest quality of life possible, integrating innovative design concepts with life-enhancing features that make a significant impact on the lives of our residents. Our bottom-line business acumen, strong sense of social advocacy, and interest in innovation enable us to sustain strong relationships with public and private partners and to continually develop award-winning projects.

Meta has a number of comparable affordable communities, eight of which are highlighted in subsequent sections of this book and include:

- » **Oakland 34**
- » **Long Beach Senior Arts Colony**
- » **NoHo Senior Arts Colony**
- » **Adams and Central**
- » **Burbank Senior Arts Colony**
- » **Pacific Avenue Arts**
- » **Glendale Arts Colony**

As you will see, the Glendale Arts Colony is nearly the exact same scope as what we are proposing in Burlingame. This will be extremely beneficial to the Burlingame development as we learn from the performance of the Glendale project.



Featured Project: Oakland 34

10920 MacArthur Boulevard, Oakland, CA, Senior Affordable



Project Summary

Project Size: (Sq. Ft.) 37,373

Developer's Equity Interest <1%

Total Development Costs: \$ 10.1 million

Total Housing Units: 33

- » Manager's Unit 1
- » Affordable Units 32

Product Type:

- » Construction Category New Construction
- » Type of Housing Affordable Rental
- » Development Type 4-story with Elevator

Target Population:

- » Low income seniors aged 55 and older

Community Benefits:

- » Transit Oriented Development
- » Enterprise Green Communities

Project Team

- » **Developer:** Meta Housing Corporation
- » **General Partner:** Century Affordable Development Inc.
- » **Contractor:** RAAM Construction, Inc.
- » **Architect:** YM Architects
- » **Construction Management:** KKG, Inc.
- » **Property Management:** Solari Enterprises, Inc.

Overview

Oakland 34 consists of the new construction of 33 one-, and two -bedroom rental apartments for very low- and low-income families on a 0.34 acre lot in Oakland. The building comprises 27 one-bedroom units, and 6 two-bedroom units ranging from approximately 540-910 sq. ft. The garage is on the first floor and contains 33 parking spaces.

This 33-unit senior housing development is located on a major boulevard in Oakland and is in close proximity to public transportation and community resources. The lobby, offices, computer and community rooms, which are located on the ground floor, provide a “commercial” feel and activate the street front. There is also a community room and kitchen located on the second floor which has direct access to the landscaped courtyard. The courtyard has BBQ area and will be a space used for gathering and relaxing. All individual units are A.D.A. adaptable, so the units can easily be adapted to accommodate the mobility requirements of its senior residents.

Financing Summary

The development was completed for a total development cost of approximately \$10.1 million. Please see the summary sources and uses tables below.

Construction Sources

» Bank of America	\$ 7,750,500
» AHP Loan	320,000
» Tax Credit Equity	1,229,051
» Deferred Costs	951,916
» Total	\$ 10,051,467

Permanent Sources

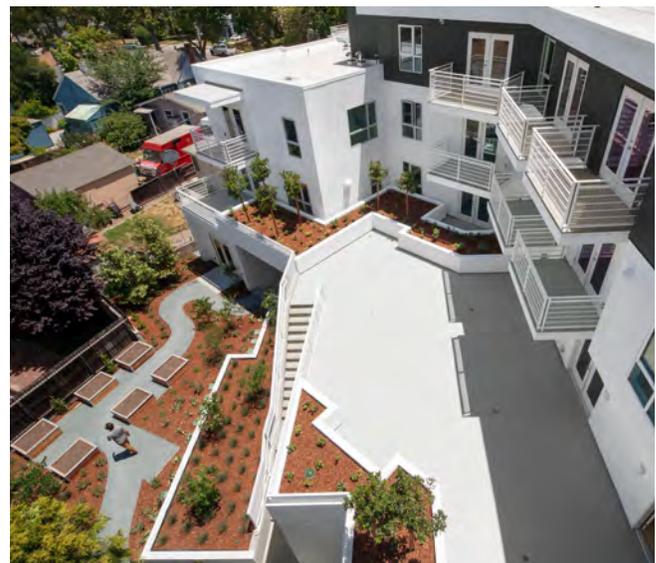
» JPMorgan Chase Bank Perm Loan	\$ 1,434,100
» AHP	\$320,000
» Deferred Developer Fee	\$615,798
» 9% Tax Credit Equity	\$7,681,569
» Total	\$ 10,051,467

Permanent Uses

» Land	\$ 527,005
» Architecture/Engineering	665,590
» Financing Costs	460,531
» Other Soft Costs	1,828,341
» Hard Costs	5,570,000
» Dev. Fee	1,000,000
» Total Uses	\$ 10,051,467

Unit Mix/Affordability Levels

Unit Type	LIHTC Income Level	Number of Units
1 BR	35%	3
1 BR	50%	4
1 BR	45%	4
1 BR	50%	10
1 BR	60%	6
2 BR	30%	1
2 BR	60%	4
2 BR (Employee's Unit)	N/A	1
Total		33



Featured Project: Long Beach Senior Arts Colony

200 E. Anaheim Street, Long Beach, CA 90813
Senior Affordable—4% Tax Credits (Arts Colony)



Awards

- » **2013 PCBC Gold Nugget Winning Category** - Best Affordable Project (30 u/acre or more) - Merit Award
- » **2012 NAHB's Best of 50+ Housing Council Gold Achievement Award** - Best Affordable Rental "On the Boards"
- » **2011 BIA Southern California 50+ Housing Council: SAGE Award Project Of The Year** - Best "On-the-Boards"
- » **PCBC: Gold Nugget Winning Category** - Best "On-the-Boards" Multi-Family Community - Grand Award

Ownership

- Long Beach Senior Artists Colony, LP
- » AGP, Long Beach Senior Artists Colony, LLC
John M. Huskey, Sole Member & Manager
- » MGP, Century Affordable Development (Century Housing)

Team

- » **Developer** - Meta Housing Corporation
- » **Architect** - Studio 111
- » **General Contractor** - Cobalt Construction Company
- » **Property Manger** - Western Seniors Housing
- » **Service Provider** - EngAGE

Unit Count

- | | |
|----------------|------------------|
| » Studio | 6 Units |
| » 1bd | 99 Units |
| » 2bd | 56 Units |
| » Total | 161 Units |

Project Description

Long Beach Senior Artists Colony is the first installment of a two phase transit oriented development that maximizes the site's proximity to two major transit lines; the Metro Light Rail Blue Line on Long Beach Boulevard and the Anaheim Street bus corridor which is the most-utilized in the City. The development's overall goal is to achieve a mixed use, mixed income, multigenerational residential community with rental and ownership opportunities. At full build-out the project is entitled for 356 units of housing, 42,000 square feet of retail and 610 parking stalls. The site is located at the south west corner of Anaheim and Long Beach Boulevard.

The relatively flat 1.74 acre vacant site encompassing phase one is located at the western side of the overall project area. The first phase involves two senior housing components; a 161 unit Senior Artists Colony (SAC), a community focused on continued learning and fitness, and an adjacent building, the Arts Annex (AA) containing 39 units of additional affordable senior housing. The SAC amenities include art studios, a playhouse/ community room, library, audio/visual studio, classroom, computer lab, billiard room, fitness center and game room. Residents of the both buildings will have shared access to all on-site amenities.



Innovation

The Long Beach Senior Artists Colony is an ideal example of Meta Housing Corporation's 4th Generation of Independent Senior Housing. The 161 unit residential community is designed for seniors earning between 30%-60% of the Area Median Income. The residential community offers residents a safe and secure place to live in a contemporary, amenity rich setting. This will be an intentionally planned community shaped by the expressions and creativity of a joined active population sharing an interest in arts and entertainment, coupled with a desire to have the next phase of their lives as fulfilling as possible.

The onsite services, offered at no additional cost to the residents, include an integrated community theatre groups, available on a volunteer basis to residents and interested members of the surrounding community. Whether a senior with prior exposure to the stage (from either side of the lights) or just curious to explore their untapped imagination, the Long Beach Senior Artists Colony will provide opportunity for them to proceed as fast and as far as their interest seeks to take them. The project will incorporate theater space and other areas to encourage these pursuits. In addition, the project will participate in area wide activities of the EngAGE program, including joint artistic production with residents of the other similar projects located in North Hollywood (The Piedmont and The NoHo Senior Artists Colony) and Burbank (The Burbank Senior Artists Colony).

The Long Beach Senior Artists Colony is the result of many years of cooperative efforts of Meta Housing Corporation and the City of Long Beach utilizing programs designed to revitalize communities through social and environmental considerations. The financial structure of the Long Beach Senior Artists Colony includes the following commitments from public and private sources:

1. Housing Development Company
2. Housing and Community Development – Transit Oriented Development Program
3. Housing and Community Development – Infill Infrastructure Grant Program
4. Federal Home Loan Bank – Affordable Housing Program
5. Low Income Housing Tax Credit Program – 9% Tax Credits (Phase Ib)



6. Low Income Housing Tax Credit Program – 4% Tax Credits (Phase Ia)
7. California Debt Limit Allocation Committee – 4% Tax Exempt Bonds
8. Private Equity Investment
9. Private Placement Lender
10. Conventional Commercial

The project targets the active senior population by creating an affordable community with the amenities that engage the spirit and creativity of an active lifestyle. Facilities and services are provided onsite, without charge.

Features

The Long Beach Senior Artists Colony concept incorporates specific features facilitating an active and creative senior community. The secured site will offer onsite community amenities such as a 99 seat theater, art studios, community rooms, audio/visual studio, billiards room, community gardens, dog park, residential library, barbecue areas, spa, laundry facilities, outdoor areas, and on-site management offices. These spaces encourage active residents to learn, recreate and engage socially with appropriate facilities. Resident and community programs will involve and respond to evolving residents' interests. These amenities

along with the computer lab, theater, and library facilitate a creative community.

In addition, the project will experiment with concepts typically not included in senior housing but have growing interest, such as a cooperative "Zip Car," local walking club and community bicycle program. These activities will also encourage the "outside-in" features of the project's engagement philosophy, as exemplified by the EngAGE programs.

These EngAGE programs are award-winning, fun, and proven to be a valuable enhancement for the project and the community alike:

- » Savings to society: EngAGE programs reduce by 25% the number of seniors requiring higher levels of care such as round-the-clock nursing care, representing a \$3,000 per month, per person reduction in cost of care for at least 500 residents, representing an annual savings of \$18 million,. All while making life better and more rewarding for each of these senior residents. - From a recent survey
- » The National Endowment for the Arts named EngAGE an Exemplary Program for Best Practices in Lifelong Learning as exemplified in another of Artists Colonies, one of only 10 in the nation. - National Endowment for the Arts, Office of AccessAbility

- » Seniors who participate in intensive, participatory arts and lifelong learning programs (like those offered by EngAGE) report improved health, fewer doctor visits and less medication usage. - From The Creativity and Aging Study, Gene Cohen, M.D., Ph.D., George Washington University
- » EngAGE had more respondents reporting improved health in the past year as contrasted to Non- EngAGE sites, where more respondents reported worsening health. - From the USC study, Lifestyles of Low-Income Seniors Living in Independent Senior Housing

Longevity

A variety of programs are offered to encourage both physical and mental growth. Many other programs will develop based on context driven opportunities. Samples of these programs include:

Lifelong Learning: College-level classes include computer/internet training, language programs, and lectures.

- » **Lifelong Learning:** College-level classes include computer/internet training, language programs, and lectures.
- » **Arts/Creativity:** Classes in creative writing,

filmmaking, music, dance, visual arts, theatre as well as concerts, multi-arts events, and peer groups.

- » **Wellness:** Healthy eating, fitness/exercise, strength training, falls prevention, health education, and celebrations of life.
- » **Intergenerational:** Intergenerational mentoring, arts groups, read-aloud literacy programs, partnerships with local schools and colleges.
- » **Community Building:** Resident councils/committees, volunteer opportunities, voter services, and public/private partnerships.
- » **The Necessities:** Food bank and linkages to senior community resources.
- » **Culminating Events:** Senior Olympics, stage shows, Experience Talks radio show and semester schedule (semester goals, students advance to higher levels of coursework, graduation ceremonies, diplomas, recognition)

Other components supporting longevity include mobility through public transit and abundant and secure communal open space for phase one and further expanded to one third of an acre in phase two where a common green will allow seniors to mingle with singles, couples and families of mixed income and age groups.



Featured Project: NoHo Senior Arts Colony (NSAC)

10747 Magnolia Blvd. | North Hollywood, CA
 Senior Affordable—4% Tax Credits (Arts Colony)



Project Summary

Project Size: (Sq. Ft.)	57,499
Community Room	4,615
Common Space	11,278
Total Development Costs:	\$ 36.6 million
Developer's Equity Interest	<1%
Total Housing Units:	125
» Manager's Unit	1
» Affordable Units	26
» Market Rate Units	98

Product Type:

» Construction Category	Rehab
» Type of Housing	Affordable Rental
» Development Type	3-Story w/Elevator

Target Population:

- » Low-Income Senior

Project Team

- » **Developer:** Meta Housing Corporation
- » **Architect:** John Cotton Architects
- » **General Contractor:** Optimus Construction
- » **Property Manager:** Western Senior Housing
- » **Service Provider:** EngAGE; Western Community Housing; Project Access
- » **Attorney:** Bocarsly, Emden, Cowan, Esmail & Arndt LLP

Project Description

This senior project is located in North Hollywood, California at the intersection of Magnolia Boulevard and Riverton Street in what is known as the NoHo Arts District. The NoHo Arts District is a diverse urban

neighborhood with many small performance theaters, artist's studios, and creative professionals.

The development is a senior, urban infill, high-density project providing 126 luxury units with an 80% market rate and 20% low-income apartment mix. What differentiates the Arts Colony is that the design of the communal social spaces are based on using the visual, written, performance, and musical arts to promote interaction and community for the senior residents.

The community amenities that promote life enhancing program include an art and sculpture studios and exhibit space, a performing-arts theater, rehearsal spaces, a creative-writing and read-aloud library, computer-media arts center, yoga-and-meditation room, as well as the more traditional community rooms. There are organized classes in each respective arts discipline.

To further differentiate the project, the Los Angeles Community Redevelopment Agency participated to create a seventy-six seat performing arts theater with a resident professional theater group. The theater-use concept is to have this state-of-the-art small theater serve a dual purpose by (1) adding to the NoHo Arts District neighborhood by providing a venue for professional theater and (2) serving as the in-house theater for the residents' performing-arts program, as well as serving as the movie theater for resident movie nights.

This development is located on 1.3 acres with two stories of parking, one below grade and one at street level. The apartment component is located on the top three floors. The units are composed of one- and two-bedroom apartments and are arranged around three courtyards. The center courtyard has pool and spa amenities and is the location for the pool-exercise classes. The two other courtyards provide quiet, reflective areas and are heavily landscaped with bubbling fountains to provide a peaceful environment. The community room is at the south end of the building so the room and the nearby trellised second-level deck terrace will be sun-drenched and have a visual connection to Magnolia Boulevard below. The public theater entrance and ticket booth are located along Magnolia Blvd, while the separate security-access Arts Colony building resident's entrance is located at the corner of Riverton and Magnolia.

Unit Mix/Affordability Levels

Unit Type	LIHTC Income Level	Number of Units
1 BR	40%	16
1 BR	40%	2
2 BR	40%	2
1 BR	50%	6
2 BR	Market Rate	71
2 BR	Market Rate	27
2 BR (Employee's Unit)	N/A	1
Total		126

Financing Innovation

The NoHo Senior Artists Colony is an ideal example of Meta Housing Corporation's 4th Generation of Independent Senior Housing. The affordable component is designed for seniors earning between 30%-60% of the Area Median Income. The residential community offers residents a safe and secure place to live in a contemporary, amenity rich setting. This is an intentionally-planned community shaped by the collective expressions and creativity of an active population that shares an interest in arts and entertainment, coupled with a desire to have the next phase of their lives be as fulfilling as possible.

As noted above, Meta and LA's CRA collaborated with a local theater group to provide an innovative service to both the senior residents and the neighborhood—they provided a performing-arts studio and program on-site, which is accessible to both residents and the general public. It is available on a volunteer basis to residents and interested members of the surrounding community. Whether a senior with prior exposure to the stage (from either side of the lights) or just curious to explore their untapped imagination, NSAC provides an opportunity for them to proceed as fast and as far as their interest seeks to take them. The project incorporates theater space and other areas to encourage these pursuits. In addition, the project participates in area-wide activities of the EngAGE program, including joint artistic production with residents of the other similar projects located in North Hollywood (The Piedmont), Long Beach (Long Beach Senior Artists Colony), and Burbank (The Burbank Senior Artists Colony).

CRA/LA bought the site for \$5.8 million, provided Meta with a pre-development loan, and leased the property to Meta for 57 years. Project financing sources include: \$25.2 million in tax-exempt bonds from the California Communities Development Authority; \$2 million in 4-percent tax credits; and \$3.4 million in developer equity and deferred fees. Optimus Construction, Inc., was the general contractor.

The project targets the active-senior population by creating an affordable community with the amenities that engage the spirit and creativity of an active lifestyle. Facilities and services are provided onsite, without charge.

Notable Features

NSAC incorporates specific features facilitating an active and creative senior community. The secured site offers onsite community amenities such as a 76-seat theater, art studios, community rooms, audio/visual studio, billiards room, community gardens, dog park, residential library, barbecue areas, spa, laundry facilities, outdoor areas, and on-site management offices. These spaces encourage active residents to learn, recreate and engage socially with appropriate facilities. Resident and community programs will involve and respond to evolving residents’ interests. These amenities, along with the computer lab, theater, and library facilitate a creative community.

In addition, the project experiments with concepts typically not included in senior housing but have growing interest, such as a cooperative “Zip Car,” local walking club and community bicycle program. These activities will also encourage the “outside-in” features of the project’s engagement philosophy, as exemplified by the EngAGE programs, including:

- » Savings to society: EngAGE programs reduce by 25% the number of seniors requiring higher levels of care such as round-the-clock nursing care, representing a \$3,000 per month, per person reduction in cost of care for at least 500 residents, representing an annual savings of \$18 million, all while making life better and more rewarding for each of these senior residents. - From a recent survey
- » The National Endowment for the Arts named EngAGE an Exemplary Program for Best Practices in Lifelong Learning as exemplified in another of Artists Colonies, one of only 10 in the nation. - National Endowment for

the Arts, Office of AccessAbility

- » Seniors who participate in intensive, participatory arts and lifelong-learning programs (like those offered by EngAGE) report improved health, fewer doctor visits and less medication usage. - From The Creativity and Aging Study, Gene Cohen, M.D., Ph.D., George Washington University
- » EngAGE had more respondents reporting improved health in the past year as contrasted to non-EngAGE sites, where more respondents reported worsening health. - From the USC study, Lifestyles of Low-income Seniors Living in Independent Senior Housing

Financing Summary

The development was completed for a total development cost of approximately \$36.6 million. Please see the summary sources and uses tables below.

Construction Sources

» RED Capital Group	\$ 23,990,000
» Redevelopment Agency	800,000
» Deferred Developer Fee	1,406,589
» Series B Bonds- Merchant Capital, LLC	8,635,000
» Tax Credit Equity	1,752,573
» Total	\$ 36,584,162

Permanent Sources

» RED Capital Group	\$ 23,990,000
» Redevelopment Agency	800,000
» Deferred Developer Fee	1,147,565
» Series B Bonds- Merchant Capital, LLC	8,635,000
» Tax Credit Equity	2,011,597
» Total	\$ 36,584,162

Permant Uses

» Land	\$ 1,804,700
» Hard Costs	18,802,819
» Arch/Engineering	2,679,730
» Legal/Financing Fees	8,090,119
» Other Soft Costs	2,706,994
» Total	\$ 36,584,162

Public Agency Reference

Tim Elliott, Major Projects

City of Los Angeles Housing Department
 1200 West 7th Street, 8th Floor, Los Angeles CA 90017
 (213) 808-8596 / timothy.elliott@lacity.org

The New York Times

NYTIMES.COM

"All the News That's Fit to Print"

TUESDAY, AUGUST 15, 2012

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Opinionator

For Healthy Aging, a Late Act in the Footlights

By TINA ROSENBERG

What kind of old age will you have? Many of us look forward to spending retirement expanding our world — traveling, trying what we never had time to do, taking classes that give us new knowledge and skills. These activities are not only desirable in themselves, they help us to live longer and healthier lives.

But they are not within everyone's reach. Absent money and a sense of possibilities, retirement can become more time to fill with television. "We see people without money, who had very hard lives, who are not aware of their own potential," said Maureen Kellen-Taylor, the chief operating officer of EngAGE, a program in the Los Angeles area that provides arts and other classes for some 5,000 people — the vast majority of them low-income — living in senior apartment communities. "They just had to get through life, taking care of things, and the idea of following a dream was not on their radar screens."

That's why the Burbank Senior Artists Colony is remarkable. Opened in 2005, it is a mix of market-rate and low-income apartments. The building looks like an upscale hotel but is built for the arts, with studios, a video editing room, a theater and classrooms.

Residents may arrive with no previous artistic experience or skill as an artist — but artists they become. The theater group that Sally Connors participates in is working with a troupe in London, via Skype, to write and perform a soap opera. Walter Hurlburt shows his oil paintings — for sale — at the colony's periodic art exhibitions. Residents work with students from a nearby alternative high school to do improv theater, make claymation films and art from recycled items. Suzanne Knode wrote a short movie, "Bandida," about an elderly woman who takes the bus to rob a convenience store. Then the residents filmed it — and Ira Glass's "This American Life" television show filmed them — and submitted the film to the Sundance Film Festival. "A pistol, a plan, and sensible shoes," says the poster.

The Burbank colony is the showpiece of EngAGE, an organization started in 1997



GENE SCHKLAIR FOR ENGAGE

Basil Alexander at an EngAGE annual senior Olympics, a multi-generational event that allows seniors to participate in competitions in wellness and the arts.

by Tim Carpenter. He was working for a health care company that built primary care centers for senior citizens when he met John Huskey, a Los Angeles developer of affordable housing.

Carpenter and Huskey began to talk about how to combine what each of them was doing. They had originally contemplated establishing acute-care health centers in senior apartment buildings, but now had a different idea. "We live in a society that's very acute-care based — we wait till someone's sick," Carpenter said. "We decided to try to get people to take on healthy behaviors without having to go to the doctor."

Carpenter, who had a background in the arts, started in one of the complexes built by Huskey's company, Meta Housing, in Duarte in 1997, by teaching writing himself. The program soon expanded to more buildings. In 2005, the Burbank colony opened — the first one in which EngAGE had a say in the design.

EngAGE now brings arts training, wellness programs like an annual Senior Olympics, and computer and other classes to 27 senior apartment buildings in the Los Angeles area, and will add another eight over the next year, including two — in North Hollywood and Long Beach — that, like Burbank, will be designed for the arts. The NoHo Senior Artists Colony will open in October with a 77-seat professional theater in the lobby. Burbank and the Piedmont Senior Apartments in North Hollywood have a mix of market rate and subsidized apartments, but the other 25 are all for low-income seniors. Most of the residents are living on less than \$15,000 a year. They pay \$400 to \$800 a month for a one- or two-bedroom apartment.

The classes are demanding — no one is gluing macaroni to paper plates — and the teachers are pros, either laid-off schoolteachers or artists. The dance teacher at the Portofino Villas site in Pomona, for example, is Trina Parks,

a dancer and actress who was the first seriously lethal and first African-American Bond girl — she played Thumper in “Diamonds Are Forever.”

Carpenter calls this approach the opposite of the assisted-living model. Assisted living centers provide whatever medical care is needed. They usually have a great dining hall. There are buses to the mall and trips to see plays. “These are things that don’t help people that much,” Carpenter said.

Everyone knows that staying physically fit is important to remaining healthy in later years. And we know that mental fitness is also crucial.

But certain strategies are better than others. “Doing Sudoku helps the part of the brain that does Sudoku,” said Michael C. Patterson, who used to run the Staying Sharp program at AARP and now is a principal in MindRAMP, a company that advises institutions working with senior citizens on promoting brain health in aging. “You need to exercise the full brain.”

And it has to be a serious exercise, Patterson says. “Part of the process is you set a goal for yourself, and did you achieve it?” he said. “Making potholders is not going to do the trick.”

Creativity in aging is Patterson’s business, of course, but the idea is amply supported by research. (The National Center for Creative Aging is a good place to start.) One of the best all-around exercises for older adults is doing theater. The researchers Helga and Tony Noice (she is a psychologist, he is an actor) gave nine 90-minute classes to a group of adults. Some did theater training, some trained in visual arts and another group did nothing. After four weeks, the differences in cognitive function were astonishing. The theater trainees scored nearly a 60 percent increase in problem-solving ability (with visual arts, that ability declined) and the gain was sustained. The Noices believe that theater is especially good for the brain because it requires engagement on many levels — emotional, physical and intellectual.

Not inconsequential: theater is fun and social, so people stick with it. Some of the visual arts students dropped out, but none of the actors did. “When you really get involved in a creative project, it’s physical exercise, mental stimulation, socializing, your stress goes down and it’s enjoyable — something you will do,” said Patterson.

A study done at the University of Southern California found that more respondents in EngAGE programs reported that their health had improved in the past year, while in a control group, more people reported that their health had worsened. A study carried out by Century Housing, one of the top lenders to EngAGE’s communities, put a dollar figure on the gains. In the program, it found, 25 percent fewer people than in comparable groups needed expensive interventions such as nursing care. The savings came to about \$9,000 per year per resident.

EngAGE gets its money in part through fund-raising, but two-thirds of its income comes as payments from the senior complexes where it works. These buildings, in turn, stay afloat mainly through federal tax credits for low-income housing, said Huskey. The program is highly competitive, and projects are more likely to win tax credits if they have a local financial contribution — for example, from the Los Angeles Community Redevelopment Agency, or from banks, which by law must invest in their communities, including in low-income areas.

EngAGE is an important selling point for these groups, Huskey said. “They would much rather have a project that has a better story of how it’s affecting people’s lives. They want to do well by doing good.” Huskey said his company was approaching Charlotte, N.C., Austin, Tex., and Minneapolis about starting senior artist colonies in those cities. “What started out as self-serving desire to get a 15-minute head start on my competitors has become a great thing,” Huskey said.

Sally Connors thinks so. She and her husband had five good years after his lung

cancer diagnosis, and they used them to travel. After he died, Connors, a junior high science teacher, thought she would spend her time reading, walking and doing genealogical research. “I wouldn’t be going out and doing things,” she said. “I would be very bored.”

But she had a daughter in Burbank, and one day they drove by the colony. “Why don’t you live there, Mom?” her daughter said.

“I’m not an artist,” Connors replied.

“But you could be,” her daughter said.

That was five years ago. Since then, she has taken every single class EngAGE offers in the colony. She’s been in every theater performance. She had dreamed as a teenager of singing with a band — now she sang “Sentimental Journey” and “Blue Moon” with a band at a Fourth of July celebration. She wrote a two-minute screenplay, cast it, directed it, produced it and showed it as part of a film festival in the building. She’s part of the theater group working with their British counterparts, and mentors high school kids. She’s studied drawing and acrylic, watercolor and oil painting.

At 78, she does yoga twice a week and works out with a personal trainer. “I would be a lot older than I am right now if I hadn’t found this,” she said. “Definitely older mentally. I have a friend I don’t call anymore. For her everything is wrong — I can’t do this because I’m too old. That would have been me.”

“All those years I spent thinking: ‘If I only knew then what I know now,’” said Suzanne Knode, who counts “Bandida” — her first writing ever, at 63 — as the start of a new life. “But I said, ‘Wait a minute. I know now what I know now. And I’m still alive.’”

Tina Rosenberg won a Pulitzer Prize for her book “The Haunted Land: Facing Europe’s Ghosts After Communism.” She is a former editorial writer for The Times and the author of, most recently, “Join the Club: How Peer Pressure Can Transform the World” and the World War II spy story e-book “D Is for Deception.”

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Meta Housing Corporation

1640 Sepulveda Boulevard, Suite 425
Los Angeles, CA 90025
(310) 575-3543
www.metahousing.com



RENDERING BY JOHN DOTTON ARCHITECTS

Planned: The NoHo Senior Artists Colony is expected to be ready in about 18 months.

NoHo Project Boosts Profile of Senior Housing Company

DEVELOP: Firm takes concept it introduced in Burbank to North Hollywood Arts District.

By **ANDREA ALEGRIA** Staff Reporter

Building on the success of The Burbank Senior Artists Colony, **Meta Housing Corporation** is now banking on its innovative senior housing model to serve as an economic catalyst for the NoHo Arts District's east side.

The company is now building a similar art-themed \$42 million senior housing project on 10747 Magnolia Blvd. that is slated to open by mid 2012.

"This is going to be a key part of redeveloping the NoHo Arts District," said **Aaron Mandel**, vice president of Meta Housing Corporation, a company that has carved out a profitable niche developing affordable and mixed-income senior housing projects.

Built in partnership, with the Community Redevelopment of the City of Los Angeles, the new NoHo Senior Artists Colony will consist of 126-units and will include 15,000 square feet of studio gallery and classroom space for seniors, as well as a 76-seat performance theater which will house a resident production company.

"We believe this project will have a catalytic effect in this neighborhood and will help transform the area," said Los Angeles City Community Redevelopment Agency Project Manager **Gazala Pirzada**, at a ground breaking ceremony Jan. 20.

Pirzada said the CRA visited the Burbank Senior Artists Colony a few years ago and decided they wanted to incorporate a similar project in their redevelopment efforts in NoHo.

The development would be a good way to advance the district's recognition and reputation as a cultural, tourism destination area, she said, and so the CRA reached out to Meta Housing Corporation to carry out the project.

The new art themed development hopes to lure artistically inclined residents older than 55 years of age who would not mind paying premium rents in exchange for services and amenities.

Senior model

Meta Housing Corporation, which got its start back in 1993 developing resort-style housing for seniors in the San Fernando Valley, has proved that the model is financially viable.

"The Burbank Senior Artists Colony is 90-95 percent leased with rents higher than those in the surrounding neighborhood," Mandel said.

Opened in 2005, the Burbank complex offers one and two bedroom apartments that rent for up to \$2,662.

According to the developer, the Burbank colony has successfully gathered true artists and fancied ones-dancers, musicians, painters, sculptors, and writers-who have access to a video and film editing lab, two art studios and programming delivered by EngAGE, a non profit that offers on-site arts and cultural activities to residents.

The programs, which are free for tenants, include yoga and aqua aerobics, as well as workshops that cover topics such as writing for television, drawing and acting.

The new NoHo Senior Artists Colony will also partner with EngAGE to offer senior programming; however it goes a step further than the Burbank development by providing a professional grade theater in the premises.

Artists: Firm's Latest Project

The **Road Theatre Company**, a non profit based at the Lankershim Art Center, which celebrated its 20th anniversary this year, will overate as The Road on Riverton theater within the apartment community.

"The Road Theme is a very valued cultural asset in the area," said Pirzada. This will mean improved access to cultural activities for the entire community that will live in and around this project"

Other amenities

The project will also include open space within three landscaped courtyards, a swimming and spa, a library, billiards room, a fitness center, art galley and exhibit space, computer media center, digital video editing and filmmaking lab, radio recording and editing lab.

The Burbank development which the company claims was the nation's first purposebuilt senior artist community, followed the construction of The Piedmont on Vanowen and Whitsett in North Hollywood-a luxury senior apartment community built by Meta Housing Corp. in 2002.

That apartment community did not have an arts theme, however it did partner with EngAGE to offer activities and programming to the senior residents.

The Piedmont is also getting premium rents even in a difficult economy, according to Mandel.

Rents for the new NoHo Colony have not been determined yet, as the project is still 18 months away from completion.

Although Meta Housing Corp. has a proven track record of developing successful senior housing projects, getting the NoHo project off the ground was particularly complex especially as a result of the difficult credit markets.

John Huskey, president of Meta Housing Corporation said the project often teetered on the edge of feasibility.

To jumpstart the project CRA/LA purchased the property on Magnolia Boulevard for \$5.8 million, provided a pre-development loan and leased the property to Meta Housing Corporation for 57 years.

The project financing also includes \$25.2 million in taxexempt bonds from the California Statewide Communities Development Authority, \$2 million in tax credits, and \$3.4 million in developer equity and deferred fees.

"At the darkest moments, this project couldn't make it because mortgage rates were too high," said Huskey. "But then, as part of the stimulus package the Obama administration put forth a program called the New Issue Bond Program that gave us 42 year money at about a percent and a half lower than market rate and that was key."

The project is being built by Glendale based **Optimus Con&uction Inc.**

Featured Project: **Adams & Central Mixed-Use**

1011 E. Adams Blvd., Los Angeles, CA
Mixed-Use Residential & Retail



Awards

- » **NAHB** - 2010 Pillars Builder Award - Best Affordable Apartment Complex
- » **Westside Urban** Forum: 2010 Westside Prize
- » **2010 PCBC: Gold Nugget** Winning Category – Best Mixed Use Project – Merit Award
- » **2010 PCBC: Gold Nugget** Winning Category – Best Affordable Project (30 DU/Acre or More) – Merit Award
- » **2009 Gold Nugget** Winning Category – Outstanding On-The-Boards Apartment Project – Merit Award

Overview

The Adams & Central Mixed-Use Development is a cornerstone in the redevelopment of the Downtown/South Los Angeles area. Adams Boulevard and Central Avenue are both major traffic arteries in an area of the City blighted by building deterioration, the presence of incompatible land uses, and underutilized lots. Meta worked hard with the CRA and Council Office to develop a project plan that helped alleviate the problems plaguing the area. The Project resulted in the redevelopment of an abandoned lot into much need new affordable housing and commercial space including a Fresh & Easy grocery store. The project is a strong example of good urban planning incorporating mixed-use, transit-oriented, and energy efficient design principles.

The Project provides 80 units of affordable housing including free supportive social services aimed at empowering its residents. Additionally, the Project provides the neighborhood with a greatly needed large scale grocery store. Fresh & Easy will provide affordable, organic food, along with jobs for local residents. The Project is an important signpost of the Council Office and Redevelopment Agency's focus on economic development and ongoing revitalization in this area.



Fresh & Easy will provide affordable, organic food, along with jobs for local residents.



Outdoor courtyard space allows the project to take advantage of the Southern California climate.



Residents will enjoy the multiple community spaces for dining, recreation, business and socializing.



Project Summary

Project size (sq. ft.)	162,031
» Residential	83,068
» Commercial	19,074
» Parking	59,871

Estimated job created	151
» Construction Jobs	121
» Permanent Jobs	30

Total housing units	80
» Manager’s Unit	1
» Affordable Units	79

Qualified census tract	2264.20
» Foreclosure Index Score	17
» New Market Tax Credit QCT	YES

Product type	Mixed-use (retail)
» Construction Category	New Construction
» Type of Housing	Affordable Rental

Project size (sq. ft.)	162,031
» Residential	83,068
» Commercial	19,074
» Parking	59,871

Project Team

- » **Developer:** Meta Housing Corporation
- » **General Partner:** Western Community Housing, Inc.
- » **Architect:** John Cotton Architects
- » **Property Manager:** Solari Enterprises Inc.
- » **Tax Accountant:** Stephen B. Tracy, Novogradac & Company LLP
- » **Market Analyst:** John Cole, Novogradac & Company LLP
- » **Consultant:** Lee Consulting Group
- » **Construction Manager:** Brian Kent, KKG Inc.
- » **Civil Engineer:** Dan Krief, KPFF
- » **Soils Engineer:** Karen Miller, GeoSoils

Community Benefits

- » Transit Oriented Development
- » Development of Underutilized Lot
- » Economic Revitalization
- » Elimination of Blight
- » Enhance Livability
- » Improve Image & Quality of Life of Area through High Level Urban Design
- » Improve Economic Vitality of Area
- » Increase Supply of Housing Stock
- » Increase Commercial/Retail Shopping Opportunities
- » Creation of Jobs - Local Job Opportunities
- » Energy Efficient Design
- » Revitalize Key Commercial Corridor
- » Prevailing Wage
- » Promotion of Private Investment in Community

Entitlement Process

- » **Planning:** Site Plan Review
- » **Environmental:** Mitigated Negative Declaration
- » **Airspace Subdivision (Parcel Map):** Legally separated the residential and commercial spaces.
- » **Local Support:** Meta worked hard to build strong local support for the project through our outreach process. To maintain this support, we continued to keep the community informed of the development’s progress. We established solid working relationships with the Coalition for Responsible Community Development and the Central Avenue Business Association, the two most active neighborhood groups in the area. We incorporated their feedback into the project, and in turn they assisted in gaining local support for the development.

Financing Summary

The Adams and Central Mixed-Use Developed was completed for a total development cost of approximately \$40.6 million. Please see the summary sources and uses tables below.

Residential

Permanent Sources

» CDLAC Bonds	\$ 2,345,000
» MHP	7,221,797
» LA Housing Dept.	5,788,800
» CDBG Grant	2,500,000
» CRA/LA	2,000,000
» Tax Credit Equity	10,991,084
» Deferred Costs & Fee	203,645
» Total	\$ 31,050,326

Permanent Uses

» Land	\$ 4,862,744
» Hard Costs	19,574,693
» Arch/Engineering	1,497,001
» Legal/Financing Fees	1,825,335
» Capitalized Reserves	144,248
» Impact/Processing Fees	559,831
» Soft Costs	2,586,474
» Total	\$ 31,050,326

Commerical

Permanent Sources

» Bank of America	\$ 3,400,000
» CRA/LA	2,500,000
» NMTC Equity	2,420,000
» Meta Equity	1,340,000
» Total	\$ 9,660,000

Permanent Uses

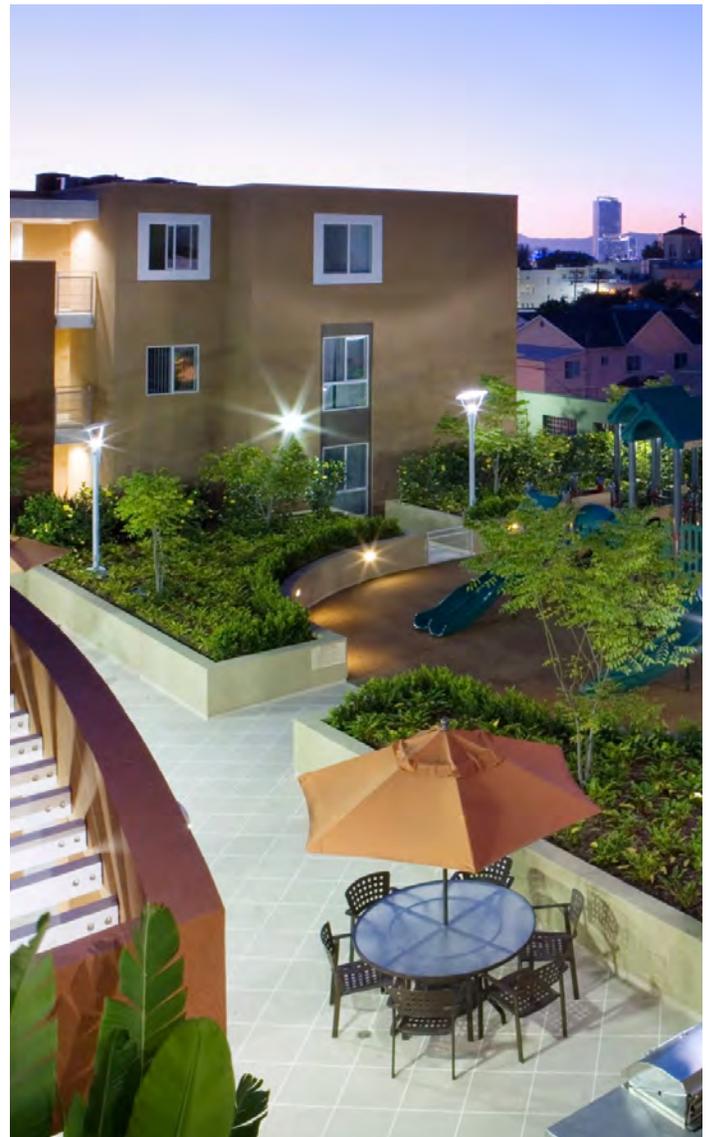
» Land	\$ 2,014,320
» Hard Costs	3,895,500
» Arch/Engineering	423,000
» Legal/Financing Fees	1,871,340
» Impact/Processing Fees	165,000
» Soft Costs	1,290,840
» Total	\$ 9,660,000

Public Agency Reference

Los Angeles Housing Department
 Tim Elliott - Telliott@lahd.lacity.org
 1200 West 7th Street, 8th Floor
 Los Angeles CA 90017
 Phone: (213) 808-8596
 Fax: (213) 808-8914

Banking Reference

Bank of America
 Charmaine Atherton
 333 S. Hope Street, 11th Floor
 Los Angeles, CA 90071
 Phone: (213) 621-4816
 Fax: (213) 621-4829



Featured Project: Burbank Arts Colony

240 East Verdugo Avenue, Burbank, CA 91502
Senior Mixed Income—4% Tax Credits



Awards

- » **2007 National Association of Home Builders (NAHB)**, Best Clubhouse at a Multifamily Community
- » **2006 NAHB** Best Small Clubhouses
- » **2006 NAHB Gold Award**, Best Overall Rental Apartments Community
- » **2006 NAHB Silver Award**, Active Adult Housing: Condominium Community
- » **2006 National Endowment for the Arts:** Creativity and Aging, Best Practices
- » **2005 SAGE** Project of the Year
- » **2003 NAHB** Best Senior Service Enriched Housing on the Boards

Project Summary

- » **Site:** 1.49 acre site
- » **Stores:** 4 stories
- » **Building Area:** 117,072 Residential SF
- » **Parking:** 141 Parking Spaces
- » **Unit Count:** 141 Units (113 one bedrooms; 27 two-bedrooms; 1 manager's unit)

Project Team

- » **Developer:** Meta Housing Corporation
- » **Architect:** Mark Sheurer Architects
- » **Property Manger:** Legacy Partners
- » **Service Provider:** EngAGE, Inc.
- » **General Contractor:** Cobalt Construction



Overview

The 141 unit Burbank Senior Artists Colony was financed by a combination of 4% Low Income Housing Tax Credits and tax exempt bonds issued by the California Housing Finance Agency. It tends to attract people who have an artistic touch, but is not restrictive. The fundamental principle is giving people the opportunity to engage in active living. Colony residents -- dancers, writers, musicians, true artists and fancied ones -- have a variety of options for creative self-expression, including two art studios (one for painters, one for potters and sculptors, and both open 24 hours a day), a video and film editing lab, a computer lab, a game room, a library, a community room and a movie theater and projection room. An advisory board of local artists and prospective tenants was recruited to pinpoint elements to enhance the senior living environment prior to breaking ground on the colony in 2003. The advisory board also include Tim Carpenter, founder of EngAGE, an L.A.-based nonprofit that designs and delivers programs for more than a dozen senior residential communities in Southern California. The approach resulted in an enriched environment for seniors. The programs are free for tenants and provided by EngAGE. Daily exercise classes include yoga and aqua aerobics. Weekly workshops explore topics such as writing for television, drawing, understanding computers and acting. Other on-site amenities include an auditorium, spa, community and recreation room with kitchen, and pool.



Permanent Uses

» Land	\$ 4,855,532
» Hard Costs	12,945,869
» Arch/Engineering	1,545,770
» Legal/Financing Fees	3,281,860
» Impact/Processing Fees	629,091
» Soft Costs	1,721,273
» Total	\$ 24,979,395

Permanent Sources

» Perm Loan	\$ 16,015,000
» CRA / LA	3,250,000
» Equity	3,737,422
» Contractor Note	300,000
» Developer Note	1,676,973
» Total	\$ 24,979,395

Bank Reference

Wells Fargo Bank, N.A.

John H. Epstein, National Manager - Community Lending
 1300 SW 5th Ave, Portland, OR 97201
 P 503-886-2587
 jepstein@wellsfargo.com

City of Burbank Reference

Ruth Davidson-Guerra

Community Development Department
 Housing & Redevelopment Division
 275 E. Olive Avenue, Burbank, CA 91510
 P 818-238-5180 | F 818-238-5174
 rdavidson@ci.burbank.ca.us

Featured Project: Pacific Avenue Arts Colony

339 South Pacific Avenue, San Pedro, CA
Affordable Family Housing- Arts Focus



Overview

Pacific Avenue Arts Colony will be the new construction of 49 one, two, and three-bedroom rental apartments for very low- and low-income artists and their families on a former automotive repair facility lot in the City of San Pedro's historic core. Pacific Avenue Arts Colony has been designed to expand the footprint of the thriving San Pedro Arts, Culture and Entertainment District (ACE) and strengthen the District's connections with surrounding communities through art exhibits, performances, and creative programming while providing a high-quality and safe environment for its residents.

Pac Arts focuses on artist housing and studio space and implements the goals of the surrounding the ACE District. The Project is a key component of local economic development strategies to lure both new artists and patrons into Downtown San Pedro. The project includes six joint Live/Work units which expand the offerings of the ACE District, helping grow existing events such as the First Thursday Art Walk and launch events drawing new visitors to

Downtown San Pedro.

The land use and design of Pac Arts are direct results of extensive conversation (over 15 total meetings) with a number of community groups, including the ACE Board, Pacific Corridor Community Advisory Committee, Pacific Corridor Design Advisory Panel, CRA/LA, and the neighborhood council. ACE is composed of various San Pedro arts stakeholders who provided direct input on the design and neighborhood connectivity. A Pac Arts sub-committee of ACE members will continue to help inform the project, its events and its curriculum. Entitlement and zoning modifications were completed in June of 2011.

Completion of Pac Arts is anticipated in March of 2015.

Project Team

- » **Property Manager:** Solari Enterprises, Inc.
- » **General Partner:** Western Community Housing
- » **Architect:** John Cotton Architects
- » **Construction Manager:** KKG, Inc.

The Vision

The vision for Pac Arts and its art gallery is to serve as a gateway, both literal and figurative, between the SPACE District and the surrounding neighborhoods with programming that complements and expands the SPACE District's activities, such as its monthly art walk and other special events.

This project is not about using art as a tool for economic or community development; it is about placing artists at the very center of both, and then ensuring that they can afford to enjoy the benefits of revitalization. It is the only affordable housing development in San Pedro designated for professional artists of all disciplines, with one-, two-, and three-bedroom apartments to accommodate both individuals and families with incomes between 30 to 60 percent of Los Angeles Area Median Income.

Additionally, because the art gallery space will serve as a community resource, rather than a commercial enterprise, its programming will prioritize inclusiveness and diversity, providing residents with unique opportunities to collaborate and interact with the broader community, and serving as an entry point for community members to experience and enjoy the amenities of the revitalized SPACE District.

The Arts

Pac Arts is a mixed-use development that provides greatly needed affordable housing for professional artists, including a variety of art focused amenities, such as an art "mess" workshop for heavy equipment, a quiet art studio workspace, a paint spray area, a smaller soundproof music room, a computer room/graphic media center, and a street-level gallery space for exhibits, performances, and other creative programming. The gallery will be the heart of the Pac Arts development, providing a platform for the Pac Arts residents to connect, collaborate, and create with each other and with the larger community.

The Pac Arts development is located on a blighted stretch of Pacific Avenue, a major transit corridor through San Pedro's historic core and just one block away from the thriving SPACE district, which boasts galleries, restaurants, theaters, and market-price live-work spaces. Beyond the district's borders, however, attracting new businesses and investment funds remains a challenge, particularly along Pacific Avenue, which the Community Redevelopment Agency of Los Angeles (CRA/LA) has described "a ribbon of functionally obsolete, poorly maintained, under-parked retail buildings." The Pac Arts development represents the first major investment in revitalizing San Pedro's historic core beyond the SPACE district, thereby serving as a much-needed gateway connecting the District and the rest of San Pedro.



Permanent Sources

- » California Community Reinvestment Corp. \$2,812,300
- » CRA/LA \$3,380,000
- » Deferred Developer Fee \$373,933
- » 9% Tax credit Equity \$11,522,485

- » **Total Sources** **\$18,088,718**

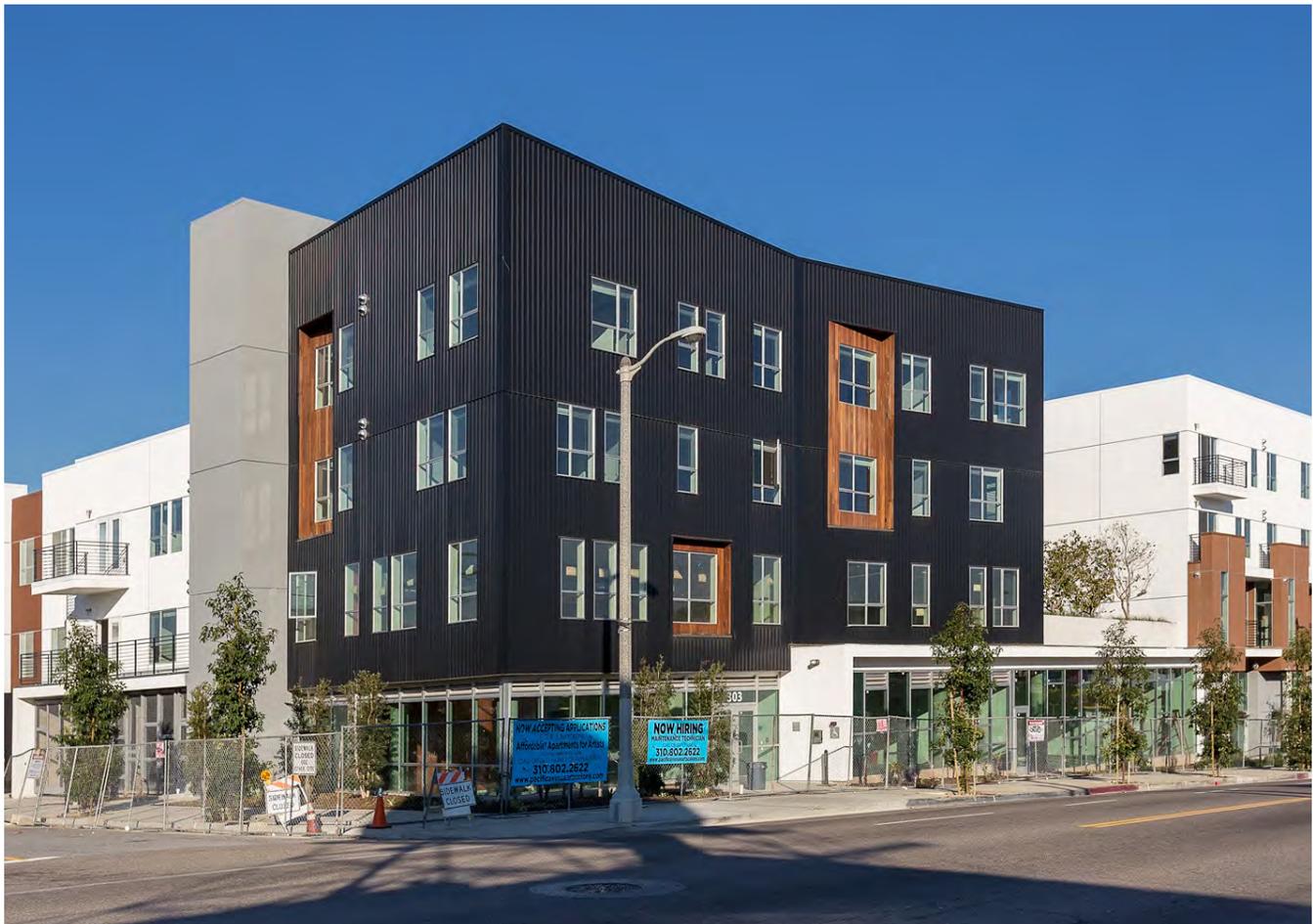
Permanent Uses

- » Land \$2,250,000
- » Acquisition Costs & Offsite Improvements \$295,000
- » Architecture/Engineering \$1,225,590
- » Financing Costs \$1,185,873
- » Reserves \$119,952
- » Other Soft Costs \$1,377,303
- » Hard Costs \$9,695,000
- » Dev. Fee \$1,940,000

- » **Total Uses** **\$ 18,088,718**

Unit Count

Unit Type	LIHTC Income Level	Number of Units
1 BR	30%	1
1 BR	50%	4
1 BR	60%	5
2 BR	30%	2
2 BR	35%	5
2 BR	40%	5
2 BR	45%	5
2 BR	50%	1
2 BR	60%	4
3 BR	30%	2
3 BR	60%	14
2 BR	MGR	1
Total		48



Featured Project: Glendale Arts Colony

121 N. Kenwood Street, Glendale CA 91206
Family —9% Tax Credits



Project Summary

- » **Site:** 2.2 Acres
- » **Stories:** 5 stories
- » **Building Area:** 222,596 Residential SF
- » **Parking:** 277 Parking Spaces
(126-Residential, 151 YMCA)
- » **Unit Count:** 70 Units

Project Team

- » **Developer:** Meta Housing Corporation
- » **Architect:** Studio One Eleven
- » **Property Manger:** Solari Property Management
- » **Service Provider:** EngAGE, Inc.
- » **General Contractor:** KPRS

Overview

Meta Housing Corporation, in partnership with the City of Glendale and YMCA is transforming a 2.2 acre campus in the heart of Glendale into the Glendale Arts Colony, a 70-unit mixed-use development that, in addition to providing affordable housing targeting an arts inclined family population, features a professional gallery, expands the footprint of Glendale's burgeoning arts and entertainment district, improves YMCA's parking and circulation and provides the YMCA with capital for long-term improvements.

Located to the rear of the YMCA campus, Glendale Arts Colony will be immediately adjacent to the city's Arts & Entertainment (A&E) district, which is centered by Maryland Avenue between Wilson and Harvard. Maryland Avenue, a short walk from the project, is a focus of city development plans to enhance the area's concentration of theaters, art galleries, music and other live entertainment clubs, concept



stores and restaurants. With this in mind, Glendale Arts Colony was thoughtfully planned to include design features and amenities that serve as an additional catalyst and guide for revitalization and future development in the A&E district.

Arts Programming

Glendale Arts Colony will provide social service programming through EngAGE that will compliment and create synergy with the YMCA and Glendale A&E district. EngAge's Chief Operating Officer and arts administrator, Maureen Kellen-Taylor will collaborate with professional artists and organizations on exhibits and workshops, as well as organize and curate art exhibits of tenant and outside art alike. Kellen-Taylor, a recipient of the California Arts Council Director's Award and an accredited collegiate-level art instructor, will also be responsible for developing innovative arts programming with a whole-person approach for all low-income households in the project.

YMCA Improvements

Proceeds from the project benefitting the YMCA will

be used to launch a comprehensive, multi-phase, \$3.5-4 million makeover to better serve its membership. Phase one improvements will include the expansion of Y parking by 78 percent (151 total slots, with 66 located in the artist's colony building); development of a spacious community welcoming lobby featuring a coffee/juice café; expansion of the strength and conditioning room, including the addition of 46 new, state-of-the-art treadmills, recumbent bicycles and cross- and weight-training machines (many with high-speed Internet access); the addition of a new, free-weight training room; relocation of the group exercise room to a larger space; the development of smaller, specialized studio spaces for youth and adult programs; a make-over of the Y's unique rooftop facilities, which include an outdoor running track and handball courts; and renovation of the existing family locker room.

Other improvements planned during two additional phases of remodeling include a redesign of the facility to create more open spaces and provide more natural lighting, including the installation of windows and/or skylights; renovations of the men and women's locker rooms; construction of a spacious, new family locker room; renovations to the original, warm-water pool to

make it handicapped accessible (in compliance with the Americans With Disabilities Act) in preparation for new programs for physical rehabilitation and to meet the needs of elderly members; installation of environmental sustainability components, including solar energy panels; improvements to facilities for youth programs; and the installation of a youth arcade.

Permanent Uses

» Land	\$	5,803,589
» Hard Costs		14,400,899
» Arch/Engineering		1,660,000
» Legal/Financing Fees		3,454,740
» Impact/Processing Fees		1,020,126
» Soft Costs		3,164,103
» Total	\$	29,503,457

Permanent Sources

» Perm Loan	\$	2,424,000
» City of Glendale		6,100,000
» Equity		20,414,686
» Deferred Developer Fee		564,771
» Total	\$	29,503,457

Unit Count

Unit Type	LIHTC Income Level	Number of Units
1 BR	35%	5
1 BR	40%	3
1 BR	45%	2
1 BR	50%	2
1 BR	60%	2
2 BR	30%	4
2 BR	40%	4
2 BR	45%	5
2 BR	50%	3
2 BR	60%	6
3 BR	30%	3
3 BR	35%	2
3 BR	50%	2
3 BR	60%	15
Total		69



D

Development Team

ACQUIRING ENTITY

To Be Formed LP c/o Meta Housing Corporation
1640 S. Sepulveda Blvd., Suite 425, Los Angeles, CA 90025

DEVELOPER / ADMINISTRATIVE GENERAL PARTNER

Meta Housing Corporation
1640 S. Sepulveda Blvd., Suite 425, Los Angeles, CA 90025
(310) 575-3543 x108 | cmaffris@metahousing.com

Name	Title	Role
Aaron Mandel	Senior Vice President	Oversight
Tim Soule	Senior Project Manager	Project Management
Frannie Hemmelgarn	Asst. Project Manager	Project Management
Kasey Burke	President	Oversight

ARCHITECT

David Baker Architects
461 Second Street | Loft c127 | San Francisco, CA 94107
(415) 896-6700 | info@dbarchitect.com

Name	Title	Role
David Baker, FAIA	Principal	Project Design
Daniel Simons, AIA	Principal	Project Design
Amanda Loper, AIA	Principal	Project Design

CONSTRUCTION MANAGEMENT

KKG, Inc.
123 E. 9th Street, Suite 201 | Upland CA 91786
(909) 624-6222 | bkent@kkginc.com

Name	Title	Role
Brian Kent	Founder/ President	Construction Management

SUSTAINABILITY CONSULTANT

Davis Energy Group
123 C Street | Davis, California
(530) 753-1100 | deq@davidenergy.com

Name	Title	Role
David Springer	Founding Principal	Sustainability Consultant
Mark Berman	President	Sustainability Consultant
Pepper Smith	Director of Residential Programs	Sustainability Consultant

PROPERTY MANAGEMENT

Cambridge Real Estate Services
PO Box 2968 | Portland, OR 97208
(503) 450-0230 | jpassadore@cambridgeres.com

Name	Title	Role
Jeff Passadore	President	Property Management Contact

RESIDENT SERVICES

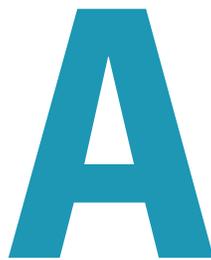
EngAGE
240 E. Verdugo Avenue | Burbank, CA 91502
(818) 563-9750 | tim@engagedaging.org

Name	Title	Role
Tim Carpenter	Executive Director	Resident Services Coordinator

**Please refer to the Appendix at the end of this proposal
for Corporate Resumes of the Development Team.**

2

ACCESS TO CAPITAL



Financing Plan

Identify what sources of financing the firm will use to construct the project, its current access to this financing and what steps it expects to go through, as well as the anticipated timing needed to secure project financing.

Financing Plan

Summary

In an effort to meet a wider variety of City objectives, we are proposing two separate financing Options that result in essentially the same project. The differences in the Options are summarized as follows:

Summary of Financing Options

Option	Total Units	Total Parking Spaces in Lot F Structure (Public)	Total Parking Spaces in Lot N Structure (Private)	City Contribution to Lot F Structure (EIFD or other)	Competitive Tax Credits?
4%	71	273	82	\$4,566,000	No
9%	66	252	82	\$2,400,000	Yes

Both Options rely on a combination of Low Income Housing Tax Credits, a capitalized ground lease from the City, and some form of public agency financing to fill the financing gap to build the additional parking structure spaces.

A Note on Parking

It is clear that part of the solution to unlocking Downtown Burlingame's potential is to increase and modernize parking. Since 2000, the City of Burlingame has engaged various consultants for parking studies and pricing estimates. Parking lot development is expensive and is primarily a civic enterprise. Financing tools exist to share the burden with tax payers, such as the EIFD structure noted below. Additionally, we do not view exclusively private financing as a viable option unless stakeholders are willing to accept a high cost for parking. Public-private options including a sale-leaseback model would be effective if the City can commit a fixed amount of its budget annually. Other options exist as well, but as a starting point, we are proposing that our residential project financing will subsidize over 50% of the total costs of building the parking structure, representing a savings of millions of dollars to the city. We will work together with the City to find the appropriate source to fill the gap.

For the Lot F Parking structure, we estimate that the parking structure will cost approximately \$9.2 Million to build, based on the 2012 Burlingame Parking study total development costs divided by total parking spaces. In the 9% Option the residential portion of the project subsidizes the parking structure by \$4.7 Million Dollars, while in the 4% Option the residential portion of the project subsidizes the parking structure by \$6.8 Million. We recommend that the remaining gap be filled by the creation of Enhanced Infrastructure Finance Districts (EIFD's) as described in more detail below; however, the City can use any source of funds to fill this gap.

Financing Tools

- » **Leased land from the City of Burlingame.** BAC proposes to lease both parcels for the appraised value (approximately \$8.5 Million), paid as a capitalized ground lease payment, plus a share of residual receipts for a minimum of 55 years. The City would then loan us back the full amount of the capitalized lease payment.
- » **Low Income Housing Tax Credits.** Tax Credits are administered by the California Tax Credit Allocation Committee (TCAC). There are two kinds of tax credits: 4% and 9%. Projects may only request one kind or the other.
 - » **4% Tax Credits** are non-competitive, meaning they are issued to any project that submits a complete and proper application. The limitation is that 4% tax credits generate less proceeds than their 9% counterparts.
 - » **9% Tax Credits** are similar in their workings to 4% tax credits, but there is a finite amount of funding available. This funding is divided regionally across the state based on population count. Applications are only accepted twice per year, and there are always more applications than funds available. The 9%

credits generate more proceeds and also target deeper affordability than the 4% tax credits; however, delays are possible. Meta Housing is one of the State's most successful applicants for tax credits over the last 10 years and we are confident that we can produce a winning application.

- » **Impact fees.** We assume the City Council will require the project pay outsized parking impact fees in exchange for entitlements of at least \$4 Million. We request this fee be loaned back to the project to offset some of the costs of replacing parking. This money would be loaned from the City to the project, resulting in no net cost to the City on the project, and would generate additional tax credit proceeds.
- » **Enhanced Infrastructure Finance Districts (EIFD's).** For Burlingame to realize its vision of expanding its downtown amenities and services, it is more efficient to consider the area parking requirements in total and identify one source for building the parking. While SB 628 does not revive the era of redevelopment agencies, EIFDs give local governments a promising new tool for tax-increment financing, with significantly greater flexibility for investment and substantially streamlined procedures than exist under current law. The statute authorizes municipalities and counties to create (EIFDs), which can fund infrastructure development and community revitalization. EIFDs do not levy new taxes or divert revenue from any nonconsenting municipality or special district. Instead, they provide a streamlined new tool for multiple layers of government to allocate existing and anticipated new tax revenue toward realizing shared goals. EIFDs can:
 - » Be created and adopt an infrastructure financing plan, by act of a county or city legislative body, instead of requiring a vote by 2/3 of the electorate
 - » Issue bonds based on tax increment financing (TIF), contingent on a vote of 55 percent of the electorate instead of a 2/3 majority;
 - » Establish a bond period of up to 45 years from the date of bonding approval – at least 15 years longer than traditional Infrastructure Financing Districts (IFDs)
 - » Serve a broader range of purposes than traditional IFDs (e.g., funding transit priority projects, low- and moderate-income housing, actions under Sustainable Communities Strategies, environmental remediation and more)
 - » Be layered with Community Facility Districts (CFDs) so that operating costs in addition to capital costs can be covered
 - » Be jointly governed by representatives of multiple taxing entities (e.g., counties, municipalities and special districts), all of whom must consent to the EIFDs' use of property taxes they would otherwise collect.
- » **Parking Revenues.** We will design and build the parking structure, and at this time we assume the City would be the owner and operator of the garage in perpetuity for efficiency and scalability reasons. We do not include any annual parking revenues or costs in our financial pro forma's. We believe there may be additional opportunities to leverage debt for the parking structure using net revenue from operations, which Meta would arrange.

Experience

Please see the next section—Section 2B—for Meta's experience in accessing the proposed financing.

Financial Pro-Forma

Please see Section 3C for Pro Forma Financials on both Financing Options.

Time Line

Please see Section 4 of this proposal for the time line.

B

Financing Experience

Has the firm developed projects of similar scale and cost – if so, where?

Financing Experience

Expertise in securing LIHTC, revenue bonds, conventional and FHA insured debt, etc.

Meta Housing Corporation has a superior track record of accessing and leveraging housing funds and managing financially complex developments. Since 1996, Meta has leveraged \$340 million of private tax credit investments to build 5,400 units of housing. Meta projects have secured 9% tax credits each year since 2003. Of our completed projects, almost half were funded with competitive 9% tax credits, while the other half were funded with 4% tax credits and tax exempt bonds. In 2009, Meta won \$10 million of Neighborhood Stabilization funds. Of \$95 million in TOD Housing Funds available, \$30 million was awarded to Meta. Meta projects also received \$22 million in IIG Funds. Since its inception, Meta has developed fifty-eight properties, of which forty-eight remain in its portfolio. Listed below is table containing a list of projects that have secured financing for low income housing and related infrastructure development:

Project Name	Total Development Costs	Tax Credit Type
5400 Hollywood	\$17,500,000	9%
Adams and Central	\$40,000,000	4%
Andalucia Senior Apartments	\$32,000,000	9%
Asturias Senior Apartments	\$29,000,000	9%
Belmont Station Apartments	\$57,400,000	4%
Buckingham Senior Apartments	\$27,300,000	4%
Burbank Senior Artists Colony	\$24,000,000	4%
Cabrillo Family Apartments	\$18,000,000	9%
Cantabria Senior Apartments	\$24,000,000	9%
Metro at Chinatown	\$50,000,000	4%
Civic Center - Oakland	\$18,500,000	TBD
Clinton Family Apartments	\$13,000,000	9%
Compton Senior Apartments	\$19,500,000	4%
Coronita Family Apartments	\$8,000,000	9%
Cortina D' Arroyo	\$25,000,000	9%
Coventry Senior Apartments	\$45,000,000	4%
Dorado Senior Apartments	\$32,000,000	9%
El Dorado Family Apartments	\$24,000,000	9%
Emerald Terrace Family Apts.	\$25,000,000	9%
Figueroa Senior Housing	\$10,700,000	4%
Glendale Arts Colony	\$31,500,000	9%
Heritage Park Senior Apts	\$8,000,000	4%
Hillside Park Senior Apartments	\$8,000,000	TBD
La Coruna Senior Apartments, LP	\$26,000,000	4%
Long Beach & 21st	\$15,000,000	9%
Long Beach & Anaheim Phase II	\$50,000,000	4%
Long Beach & Burnett	\$20,000,000	9%
Long Beach Regal aka "The Annex"	\$14,000,000	9%
Long Beach Senior Arts Colony	\$55,856,972	4%
Magnolia at 9th	\$ 21,920,598	9%
Magnolia at Highland	\$20,000,000	9%
Metro at Hollywood	\$44,601,025	4%
NoHo Senior Artists Colony	\$36,584,162	4%
Oakland 34	\$9,000,000	9%
Pacific Avenue Arts Colony	\$19,000,000	9%
Pacific Villas Apartments	\$8,600,000	TBD
Park Plaza Senior Apartments	\$21,000,000	9%

Pico/Gramercy Multifamily Apts.	\$16,400,000	4%
Rosewood Park Sr. Apartments	\$6,600,000	4%
San Clemente Senior Apts.	\$32,600,000	4%
Sherman Village	\$24,000,000	9%
Sichel Family Apartments	\$13,000,000	9%
Sterling Court	\$6,000,000	9%
Tavarua Senior Apartments	\$16,000,000	9%
The Arroyo at Baker Ranch	\$46,000,000	4%
The Grove	\$17,000,000	9%
The Grove at Sunset Court	\$17,600,000	9%
The Jasmine at Founders Village	\$30,000,000	9%
The Piedmont	\$27,000,000	4%
Tobias Terrace Apartments	\$17,900,000	9%
Union Point Family Apartments	\$8,000,000	9%
Valley Village Senior Apartments	\$16,700,000	9%
Vermont Family Apartments	\$20,000,000	9%
Vernon Village Park	\$14,000,000	9%
Washington Metro	\$23,500,000	9%
Yorba Linda Palm Family Apts.	\$11,400,000	9%

Track Record with LIHTC, Syndication and Local Support

	Units			Properties			Est Dev Cost (\$ million)	Tax Credits (\$ million)	4% (\$ million)	9% (\$ million)	Local City/ Agency (Properties)	AHP (Properties)
	Sr.	Fam.	Total	Sr.	Fam.	Total						
Predevelopment	320	386	706	4	5	9	\$ 229.00	\$ 23.47	\$ 20.41	\$ 1.33	5	0
Under Construction	116	327	443	2	4	6	\$ 131.50	\$ 70.20	\$ 27.18	\$ 43.02	4	2
Operating	2,645	766	3,411	24	15	39	\$ 933.80	\$ 389.49	\$ 110.93	\$ 278.57	25	14
Development Only	289	275	564	2	1	3	\$ 116.70	\$ 17.78	\$ 6.05	\$ 11.73	0	0
Sold	961	0	961	8	0	8	\$ 55.20	\$ 4.59	\$ 4.59	\$ 0.00	0	0
Totals	4,331	1,754	6,085	40	25	65	\$ 1,466.20	\$ 505.53	\$ 169.16	\$ 334.64	34	16

Public Financing Track Record Since 2005

Project	Status	Placed in Service Date	Type	Credit Type (4%, 9%)	Units	Market Units	CDLAC/TCAC Award	Soft Loans					
								HUD (NSP, CDBG)	State (MHP, IIG, TOD)	Local Municipality	Revel-opnment	Other (AHP) (MHSA)	
1	Lugo Senior Apartments	Precon	May-14	Senior	9%	119	0	Jul-12				X	X
2	Oakland 34	Precon	May-14	Senior	9%	33	0	Jul-12					
3	San Clemente Senior Apts.	Con	Feb-14	Senior	4%	76	0	Jul-11		X	X		X
4	Tavarua Senior Apartments	Con	May-13	Senior	9%	50	0	Jun-11			X		X
5	The Grove at Sunset Court	Con	Jul-13	Family	9%	54	0	Sep-11			X		
6	Tobias Terrace Apartments	Con	Jul-13	Family	9%	56	0	May-11			X	X	X
7	La Coruna Senior Apartments	Con	Feb-13	Senior	4%	87	0	May-11		X	X	X	X
8	5555 Hollywood	Con	Jan-13	Senior	4%	120	0	Jan-11		X	X	X	X
9	Chinatown Metro Apartments	Con	Jan-13	Senior	4%	123	0	Oct-11	X - NSP	X			
10	Figueroa Senior Housing	Con	Jan-13	Senior	4%	35	0	Mar-11	X - NSP		X	X	
11	Long Beach Senior Arts Colony	Con	Feb-13	Senior	4%	161	0	Sep-10		X		X	X
12	Sherman Village	Con	Nov-12	Family	9%	73	0	Sep-10		X	X	X	
13	Long Beach & Anaheim "The Annex" aka (Regal)	Con	Dec-12	Senior	9%	39	0	Sep-10		X		X	X
14	NoHo Senior Artists Colony	Con	Nov-12	Senior	4%	126	99	Oct-10	X - HUD 221(d)(4) loan program			X	X
15	Vermont Senior Apartments	Op	May-12	Family	9%	49	0	Jun-10			X	X	
16	Coventry Senior Apartments	Op	Apr-12	Senior	4%	240	143	Oct-10					
17	Buckingham Senior Apartments	Op	Jan-12	Senior	4%	70	0	Jan-11	X - NSP			X	X
18	Magnolia at Highland	Op	Dec-11	Senior	9%	80	0	Jun-10				X	X
19	Adams and Central	Op	Jul-05	Family	4%	80	0	Apr-08	X - CDBG	X	X	X	NMTC
20	Andalucia Senior Apartments	Op	Jul-05	Senior	9%	94	0	Oct-10			X	X	
21	Long Beach & Burnett	Op	Jul-05	Family	9%	46	9	Feb-10				X	
22	Asturias Senior Apartments	Op	Jul-05	Senior	9%	69	0	Sep-07			X	X	
23	Cantabria Senior Apartments	Op	Jul-05	Senior	9%	81	0	Jun-07			X	X	
24	Clinton Family Apartments	Op	Jun-05	Family	9%	36	0	Dec-06			X		
25	Coronita Family Apartments	Op	Jun-05	Family	9%	21	0	Sep-05			X		
26	El Dorado Family Apartments	Op	Jun-05	Family	9%	60	0	Jun-06			X	X	
27	Sichel Family Apartments	Op	Jun-05	Family	9%	37	0	Oct-06			X		
28	Union Point Family Apartments	Op	Jun-05	Family	9%	21	0	Sep-05			X		
29	Dorado Senior Apartments	Op	Jun-05	Senior	9%	150	0	Mar-03			X		
30	Emerald Terrace Family Apts.	Op	Jun-05	Family	9%	85	0	Mar-03			X		
31	Pico/Gramercy Multifamily Apts.	Op	Jun-05	Family	4%	71	0	Mar-04		X	X	X	X
32	The Grove	Op	Jun-05	Senior	9%	85	0	Jun-04			X		X
33	Cortina D' Arroyo	Op	Jun-05	Senior	9%	108	0	Mar-04			X		X
34	Yorba Linda Palm Family Apts.	Op	Jun-05	Family	9%	44	0	Jun-04			X		
35	Burbank Senior Artists Colony	Op	Jun-05	Senior	4%	141	98	Jun-02		X		X	
36	The Jasmine at Founders Village	Op	Jun-05	Senior	9%	156	0	Apr-02			X		

Financing of Arts Colonies

Noho Senior Arts Colony



Sources

» RED Capital Group	\$	
		23,990,000
» Redevelopment Agency		800,000
» Deferred Developer Fee		1,147,565
» Series B Bonds- Merchant Capital, LLC		8,635,000
» Tax Credit Equity		2,011,597
» Total	\$	36,584,162

Uses

» Land	\$	1,804,700
» Hard Costs		18,802,819
» Arch/Engineering		2,679,730
» Legal/Financing Fees		8,090,119
» Other Soft Costs		2,706,994
» Total	\$	36,584,162

Burbank Senior Arts Colony



Sources

» Perm Loan	\$	16,015,000
» CRA / LA		3,250,000
» Equity		3,737,422
» Contractor Note		300,000
» Developer Note		1,676,973
» Total	\$	24,979,395

Uses

» Land	\$	4,855,532
» Hard Costs		12,945,869
» Arch/Engineering		1,545,770
» Legal/Financing Fees		3,281,860
» Impact/Processing Fees		629,091
» Soft Costs		1,721,273
» Total	\$	24,979,395

Long Beach Arts Colony



Sources

» CCRC	\$ 8,722,150
» Long Beach Housing Dev. Corp.	8,236,000
» HCD-TOD	2,268,486
» HCD IIG	13,096,736
» Meta Housing-Deferred Fee	270,381
» Affordable Housng Grant	1,000,000
» Tax Credit Equity	18,303,816
» Total	\$ 55,856,972

Uses

» Land	\$ 9,971,796
» Hard Costs	30,992,576
» Arch/Engineering	4,391,448
» Legal/Financing Fees	7,814,855
» Other Soft Costs	2,686,297
» Total	\$ 55,856,972

Pacific Avenue Arts



Sources

» CCRC	\$2,812,300
» CRA/LA	\$3,380,000
» Deferred Developer Fee	\$373,933
» 9% Tax credit Equity	\$11,522,485
» Total Sources	\$18,088,718

Uses

» Land	\$2,250,000
» Acquisition Costs & Offsite Improvements	\$295,000
» Architecture/Engineering	\$1,225,590
» Financing Costs	\$1,185,873
» Reserves	\$119,952
» Other Soft Costs	\$1,377,303
» Hard Costs	\$9,695,000
» Dev. Fee	\$1,940,000
» Total Uses	\$ 18,088,718

Glendale Arts Colony



Sources

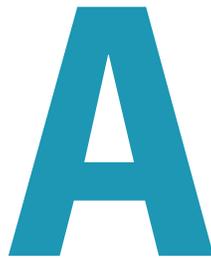
» Perm Loan	\$	2,424,000
» City of Glendale		6,100,000
» Equity		20,414,686
» Deferred Developer Fee		564,771
» Total	\$	29,503,457

Uses

» Land	\$	5,803,589
» Hard Costs		14,400,899
» Arch/Engineering		1,660,000
» Legal/Financing Fees		3,454,740
» Impact/Processing Fees		1,020,126
» Soft Costs		3,164,103
» Total	\$	29,503,457

3

PROPOSED PROJECT



Project Overview

Identify the type of project you would propose for the site, including: number and types of affordable dwelling units, levels of affordability and other design details that demonstrate compliance with the applicable goals and policies set forth within the *Burlingame Downtown Specific Plan*.

Development Concept (Vision and Usage)

Overview

The Burlingame Arts Colony (BAC) supports and encourages the creative class by fostering an environment where artists and their families can thrive. It will draw in families from the adjacent neighborhood with its programming and events. Lots F and N will be transformed into a creative campus with affordable artist housing, maker and community facilities, and a parking structure for the central business district.

The deed-restricted affordable housing will target a variety of income levels, from 30% of Area Median Income (AMI) to 60% AMI. The blend of 1-bedroom, 2-bedroom, and 3-bedroom units will encourage a diverse selection of working artists, creative professionals, and their families. The overall unit count in the 4% Option is 71 units, while the overall unit count in the 9% option is 65 units; the breakdown of unit counts and sizes is shown in Section 3B: Project Design. Please note that we believe this project would also work as affordable artist housing for active 55+ seniors in lieu of family housing.

Incomes of residents will vary from \$23,250 for a single artist in a 1-bedroom, up to \$71,760 for a family of five in a three-bedroom unit. 1-bedroom rents will range from \$622 to \$1,245. 2-bedroom rents will range from \$747 to \$1,495. The 3-bedroom unit rents will vary from \$863 to \$1,727. These income and rent levels will result in a symbiotic mix of working artists and creative working professionals, who might not be able to interact otherwise.

Parking

A crucial component of our plan is to include a public parking structure on Lot F with parking that **exceeds the current counts** of Lots F and N combined. The new structure contains 252 spaces in the 4% Option, and 273 spaces in the 9% option, providing 53 and 74 additional spaces respectively. The 31 to 36 Residents who live in the units along Park Rd will have shared access to this parking structure.

We have paid close attention to minimizing the impact of the parking structure on the surrounding neighborhood. First, we will line Park Street with residential units, hiding the parking structure behind them. Aside from the parking ramp on Park Street, passersby will not be able to identify the site as a parking structure. Second, we will transform the long connector portion of Lot F to Lorton Street into an arts garden with maker spaces, planter beds for gardening, and an outdoor performance space.

BAC honors Burlingame's economic development vision

Burlingame Arts Colony will provide an iconic arts-related entry that represents the working creative class that is rapidly fleeing the area as housing costs spike. BAC artists may have an opportunity for exposure to the community by either displaying their work in the lobby gallery fronting Lorton, in the forecourt gallery, or in the sculpture garden in the art garden on Lot F. It should be added that these galleries can include physical art, musical arts, or be used for small performances or readings. This ability to share resident art with the greater community is what will connect the development to the greater vision of catalyzing the downtown area.

That said, the Burlingame Arts Colony isn't just for artists. BAC will promote for cultural symbiosis, as BAC families need only walk a block or two to see, hear, and be inspired by all the charm that downtown Burlingame has to offer.

Our decision to line Park Road with apartment units as the facade instead of a parking structure as the facade will result in more residents having closer access to Howard Avenue and the rest of the central business district.

The BAC satisfies the following elements of the Downtown Specific Plan:

*Arts-related goals are highlighted

LAND USE

- ✓ **Policy LU-2.2:** Encourages a mix of uses in areas currently dominated by a single land use.
- ✓ **Policy LU-3.1:** Provides for sufficient residential density to support those uses.
- ✓ **Policy LU-4.2:** Promotes the civic role of Downtown through public art, open space, and public facilities
- ✓ **Policy LU-5.2:** Promotes public/private partnerships for redevelopment of City-owned properties.
- ✓ **Policy LU-5.3:** Encourages a diverse mix of uses that includes a variety of business types and housing options.

PARKING

- ✓ **Policy P-1.1:** Encourages the use of “alternative” vehicle types with ample bicycle parking and free parking for electric cars.
- ✓ **Policy P-1.2:** Devotes less land for parking Downtown while accommodating increased demand by using the land more efficiently with decked or underground parking.
- ✓ **Policy P-1.3:** Conceals parking areas through the use of attractively designed above- or below-ground parking structures.
- ✓ **Policy P-1.4:** Provides incentives for joint ventures between the City and developers for new development that includes public parking facilities.
- ✓ **Policy P-3.2:** Ensures downtown parking is conveniently located.
- ✓ **Policy P-3.3:** Provides better signage showing the location of parking facilities, the range of parking payment levels, and parking terms (i.e. 1 hour, 2 hours, etc.).
- ✓ **Policy P-5.1:** Consolidate parking lots in a convenient, centralized location such as a parking structure or underground parking on Lot J.
- ✓ **Policy P-5.2:** Construct well-designed parking garages in central locations.

STREETSCAPE

- ✓ **Policy S-4.1:** Provides ample room for pedestrians, including accommodating pedestrians with varying levels of mobility.
- ✓ **Policy S-4.2:** Encourages outdoor business activities on the streets and sidewalks such as outdoor displays.
- ✓ **Policy S-4.4:** Creates spaces for pedestrian pausing; small areas out of the main flow.
- ✓ **Policy S-4.5:** Incorporates more public art Downtown, including sculptures and murals. Provide opportunities for “art for the public” that is fitting and relevant to the context. Create a mechanism to facilitate art Downtown.

OPEN SPACE

- ✓ **Policy D-3.1:** Ensures that new development is appropriate to Burlingame with respect to size and design.
- ✓ **Policy D-4.1:** Buildings will be built out to the sidewalk, with doors and windows facing the sidewalk to create a lively pedestrian environment.
- ✓ **Goal D-5:** Explores ways of promoting green design in the downtown area; includes design that decreases the carbon footprint.

INFRASTRUCTURE

- ✓ **Policy I-2.1:** Includes solar (photovoltaic) panels and/or small wind turbines on top of parking lots/structures.

BAC maximizes leverage of Burlingame’s resources

- » We respectfully request that the City of Burlingame donate the land to the project so that we can leverage outside resources.
- » Thanks to very high land prices, the Project will leverage the City of Burlingame land donation to secure an award of CTCAC 9% tax Credits in the First Round of 2015. Based on the anticipated conditions of the 9% tax credit equity market, we have underwritten tax credit pricing conservatively at \$1.13 per credit.

BAC is pursuing the LEED for Homes Platinum certification level under the USGBC LEED rating system.

Further detail about the sustainability engineer is provided in *Development Team* section of this proposal.

Target Population

Creative class target population

The target population is people who express themselves through a medium. Described another way, it's people who create, curate, teach, or propagate imaginative works of aesthetic, functional or theatrical value using a wide variety of artistic mediums. They can be technicians, entertainers, artisans, fine artists or applied artists.

Though the following list of possible vocations is extensive, it is not intended to be comprehensive.

- » A person who works in, or is skilled in any of the fine arts, including but not limited to, painting, drawing, sculpture, book arts, printmaking and mixed-media;
- » A person who creates imaginative works of aesthetic value including but not limited to literature, poetry, photography, music composition, choreography, architecture, film and video;
- » A person who creates functional art including but not limited to jewelry, rugs, furniture, pottery, toys, and quilts;
- » A performer or theatrical artist, including but not limited to singers, dancers, musicians, actors, performance artists, costume, lighting, sound, and set designers; and
- » In all art disciplines, a designer, technician, craftsperson, teacher, or administrator who is dedicated to using their expertise within the community to support, promote, present, and/or teach and propagate their art form through events, activities, performances, culinary arts and classes.

Artist preference is protected in the new housing law

H.R. 3221, also known as the Housing and Economic Recovery Act of 2008, confirms the right of developers to use federal Low Income Housing Tax Credits to finance affordable housing targeted to certain specified groups – including artists. Buried deep in the bill was this brief amendment to the tax credit law: “A project does not fail to meet the general public use requirement solely because of occupancy restrictions or preferences that favor tenants...who are involved in artistic or literary activities.” Similar language protected projects for any “specified group” designated by a federal or state program (farm workers, teachers, police and fire workers, unwed teen mothers, among others). Two pages later, a second short passage made the entire amendment applicable “to buildings placed in service before, on, or after the enactment” of H.R. 3221.

Such a preference is permissible under the “general public use” requirements of Section 42. However, in order to use such a preference, you would still need to comply with federal and state fair housing laws (i.e. the use of the preference cannot have a disparate impact on a protected class).

(g) CLARIFICATION OF GENERAL USE REQUIREMENT. — Subsection (g) of section 42 is amended by adding at the end of the following new paragraph: “(9) CLARIFICATION OF GENERAL PUBLIC USE REQUIREMENT. — A project does not fail to meet the general public use requirement solely because of occupancy restrictions or preferences that favor tenants —

(A) with special needs,

(B) who are member of a specified group under a Federal program or State program or policy that supports housing for such a specified group, or

(C) who are involved in artistic or literary activities.”

Artists preference criteria

Artists who meet the income limits described in the next section will be offered an opportunity to live at Burlingame Arts Colony. However, an applicant must provide support for their arts qualifications in the form of the following materials:

1. A one-page statement about why they wish to live in the Burlingame Arts Colony;
2. A resume describing their art experience and/or art education, and their performance and exhibit background;
3. Two written letters of reference from people who know their work. (These do not have to be professors or art professionals but should be from people who have seen the work and know a little bit about their art experience and background.)

The application is then referred to the Artist Selection Committee (ASC). The Artist Selection Committee will be made up of three artists from three different artistic disciplines (e.g. fine arts, performing arts and music). The individuals will be familiar with the arts community in Burlingame and have experience in vetting artistic applications. ASC will contact the applicant for an interview.

Though an arts population is preferred, this preference will not override the requirement for long-term financial success.

Affordability Summary

The 9% Option will have 66 units of deed-restricted affordable housing that will target a variety of income levels, from 30% of Area Median Income (AMI) to 60% AMI. The 4% Option will have 71 deed-restricted affordable housing units with resident AMI's in the 50% and 60% range. In both scenarios the blend of 1-bedroom, 2-bedroom, and 3-bedroom units will encourage a diverse selection of working artists, creative professionals, and their families.

Incomes of residents will vary from \$23,250 for a single artist in a 1-bedroom, up to \$71,760 for a family of five in a three-bedroom unit. 1-bedroom rents will range from \$622 to \$1,245. 2-bedroom rents will range from \$747 to \$1,495. The 3-bedroom unit rents will vary from \$863 to \$1,727.

Affordability Summary		
% AMI	# Units 4% Option	# Units 9% Option
30%	0	11
40%	0	10
50%	6	29
60%	64	15
Total	70	65
Manager	1	1

BAC's affordable housing units are spacious and designed specifically for creative families and arts stakeholders. The apartments represent a variety of unit types, from one-bedroom lofts, to one-,two- and three-bedroom flats.

Assumptions about occupancy and affordability

1. This development will service households earning 30% to 60% of the San Mateo County Area Median Gross Income published by the California Tax Credit Allocation Committee.
2. Affordable monthly rents are calculated by multiplying the San Mateo County area income levels by 30%, adjusting for household size, and dividing by 12. A household size of 3 is used to calculate the affordable housing cost for a 2 bedroom unit and a household size of 4.5 is used to calculate affordable housing cost of a 3 bedroom unit.
3. Occupancy is set at a maximum of two persons per bedroom plus one. The range of occupancy per unit size is:
 - » One-bedroom 1-2 people
 - » Two-bedrooms 2-5 people
 - » Three-bedrooms 4-7 people

Additional Benefits

Tenant leadership of arts programming and teaching to the broader community

It is our hope that the colony will foster creativity and a community connection to the creative process. In addition to producing art, we anticipate our tenants will have two-fold involvement with the community. First, they can encourage original thinking and imagination by helping people acquire the tools to generate original ideas. The ability to generate ideas is central to the process of art, and indeed cultural progress. Second, we hope they can help each other and broader community members gain the skills necessary to successfully convey ideas through works of art, designs, and composition. While it's not our goal to grow a new generation of artists, it is our goal to build confidence in critical and imaginative thinking and creativity.

Existing Resources in Burlingame

The established arts scene in Burlingame is very complementary to our plans for the BAC. The Peninsula Museum of Art conducts studio classes and contains artist studios. The BAC could become a feeder for resident artists to move into those spaces, and the community programming between the two organizations can be symbiotic. With the Museum of Art being located closer to Millbrae, California Ave would be effectively bookended with two exciting community arts facilities for maximum reach in the community.

Collaborative service delivery

We anticipate that Burlingame Arts Colony will house an informed citizenry. What this means for our service provider EngAge and the tenant population is that public service delivery relationship will be more collaborative. To demonstrate, Meta's President John Huskey jokes that activities at the arts colonies involve "letting the inmates manage the asylum" and that sometimes it is "like herding cats," but working together "makes people healthier, helps them to live longer, and raises their self-reported level of happiness."

Service provider EngAGE will provide high-quality coordination services designed to improve the quality of life for tenants. Through direct and active coordination, services will be appropriate to meet the needs of the tenant population served and designed to generate positive changes in the lives of tenants, such as by increasing tenant knowledge of and access to available services, increasing household income and assets, and improving the educational success of children and youth. EngAGE will create collaborative partnerships between organizations and stakeholders, to ensure that community members have access to a full array of timely, tenant-responsive educational, health and wellness, and skill building classes. On-site services will complement off-site services already available to tenants.

EngAGE's responsibilities may include:

- » Assisting tenants, through interviews, surveys, and community meetings, to identify the services needed.
- » Identifying needed arts equipment including pottery wheels, easels, a spray box, and supply storage.
- » Identifying appropriate arts-related software
- » Hosting workshops to explore hot topics in the arts including creative writing, computer literacy.
- » Developing and maintaining partnerships with local providers of services to use the site as platform in which to deliver services.
- » Linking tenants with existing programs and services in the community.
- » Serving as a representative in the community for services offered to tenants.
- » Coordinating the staffing and presentation of on-site classes, programs and services.

- » Developing and maintaining relationships with property managers and arranging biannual meetings to discuss program opportunities or needs.
- » Participating in the creation of budgets for tenant service programs, and monitoring adherence to those budgets.
- » Developing and maintaining the resource directory that lists local service providers.

The project includes abundant physical space for service amenities. We are committed to providing services within six (6) months of the project's placed-in-service date and for a minimum period of 10 years. All services will be of a regular and ongoing nature and provided to tenants free of charge.

Sustainable/green features

The project is pursuing the LEED for Homes Platinum certification level under the well-recognized USGBC LEED rating system. The LEED (Leadership in Energy and Environmental Design) rating system has been selected for a number of reasons:

- » It is a well-recognized program amongst affordable and market-rate residential projects
- » It provides the most comprehensive set of requirements of any residential green rating system available in the United States, allowing the team to pursue the credits which best suit the project
- » The design team's familiarity with the rating system
- » Site location and proximity to community services provide a number of 'free' credits

To achieve LEED Platinum, Meta will utilize a combination of passive and active systems. Below is our preliminary list of sustainability strategies.

- » Use of drought-tolerant landscaping to reduce reliance on water for irrigation
- » High efficiency plumbing fixtures, including high efficiency cooling and heating systems (SEER 16), and high efficiency, centralized domestic hot water system (at 98% thermal efficiency)
- » HERS measures (Duct Leakage Testing, Quality Insulation Installation, Refrigerant Charge Testing, and Verified Air Conditioning EER)
- » Energy Star Appliances
- » High efficiency lighting throughout all the common areas of the building and site
- » Maximize possible credits under energy efficiency by the using high insulation values at wall (R21), roof (R36), and exposed floors (R30); and high efficiency vinyl windows (SHGC=0.18, Tvis=0.50 and U-factor=0.28 Btu/hF sq ft)
- » Framing efficiency to cut down on timber waste
- » The use of certified wood and environmentally preferable products (whenever available)
- » Reduced waste during construction

Additional Parking

In both Options, additional parking will be provided that can be utilized by visitors and local businesses.

B

Project Design

Design Concept

Burlingame Arts Community brings a vibrant locus of creativity and affordable family housing to the Downtown Burlingame area. This development is inspired by—and in turn will inspire—a sense of creative collaboration between the City, the new downtown specific plan, and the individuals and families looking for a dynamic home that supports creative expression.

This affordable arts-oriented community will serve working artists and creative types—as well as the growing family population in Burlingame—with ample affordable homes and sufficient parking as to not burden the City streets. The overall development provides 66 to 71 residential units with 334 to 355 parking spaces across two parking structures. The parking totals incorporate the replacement for parking from Lots F and N, all parking for new units, and an additional 58 to 79 new public parking spaces in the Lot F Structure.

The community spans two lots bounded by Park Street and Highland Ave. and creates an enhanced connection across Lorton Avenue, which becomes a central node of the new neighborhood. The plan includes three residential structures, a full ground-floor of community uses, freestanding art pavilions, and two main courtyards, each with a different focus.

The new buildings actively engage the street with residential entries, art and garden plazas, and event spaces at these edges, and provide sheltered spaces dedicated to cultivating community.

At its center, the development's most public faces span Lorton Ave.. The central building has a dynamic gallery space that opens onto a plaza on the north side of the street. The lobby is entered from Lorton as well. Art and community events percolate out to the street and throughout the ground floor of this building, which is dedicated to flexible common uses—including a tech lab, craft space, and community kitchen. At the far end, the building opens onto a large "cultivation" courtyard, dotted with garden planting beds, kids' play areas, and a large and shaded shared farm table.

Atop this community hub, 19 two- and three-bedroom units designed with families in mind overlook the plaza

or courtyard. The four levels of housing step down to two levels as the building nears the Lorton Ave. street edge, with a living roof bringing a flash of green to the apartment views and helping manage rain water.

To the north the courtyard is bounded by a smaller residential structure housing 16 units and entered from Highland Ave., which frames and shelters the center courtyard.

Lot N accommodates these two structures—actually one building sharing a one-level below-grade parking garage, which provides 82 secured and assigned residential parking stalls for the units above.

Across Lorton Ave., the gallery corner faces the entry to the Art Garden, a dynamic multi-use plaza. The Art Garden is the spine of the development, serving as a connector between the central community building, the parking garage, and the Park Ave. housing, as well as being a destination in itself.

The Art Garden opens with a mixed-use plaza. Lined with permeable pavers and riotous planted bioswales, this dynamic garden plaza that contains spaces for sculptures and sculptural seating, movable seating, a performance area, and flexible spots for inspired contemplation or collaboration. On the west edge it is lined with studio and maker spaces—both indoors and out for small- and large-scale works—that can accommodate a wide range of creative enterprises. Designed for gathering and inspiration, the Art Garden also serves as a delightful pathway to the residential garage.

At the south end of the site along Park Road, a finer-grained row of 7 live-work artist-style lofts connects to the active sidewalk. In keeping with the pedestrian upgrades recently completed by the City, this residential row features at-grade patios and windows overlooking the street.

Topped with 24 to 29 units for a total of 31 to 36 residences, the housing fronts the community-serving garage. The garage, with one level below grade and four levels above grade, is topped with roof parking open to the air and lined on three sides with a living bamboo screen, providing glimpses of green for the Art Garden and surrounding streets.

Type of Use and Anticipated Number of Units

Breakdown of site use

The building design addresses artists' needs for light, volume, privacy, integration, display, and function. While the development connects residents to downtown and the train station with its location, it also creates within a sanctuary for them. The building will contain artist loft studios on Lot N, and one-, two-, and three-bedroom flats organized around a podium-level outdoor plaza on Lot F. The massing and organization emphasizes light, cross views, and transparency.

Sixty-six to Sseventy-one affordable housing units

BAC's affordable housing units will represent a variety of unit types, from one-bedroom lofts, to one-, two- and three-bedroom flats. Unit sizes exceed TCAC thresholds by 15% to 25% and range from 610 to 1160 square feet. The spaces are large in order to accommodate large works and any equipment required to create it. In addition to this interior square footage, some units have extra exterior space. Units fronting the podium-level courtyard will have large patios of eight feet deep to allow artista to work outside within the courtyard. Some units may also have large roll-up doors that will provide even larger work areas.

These outdoor work areas will help sculptors explore the process of doing and understanding. It is messy, non-precious space where people can experiment with the creation and communication of ideas through sculpture. On occasion the podium level garden can also be opened to the outside for public sculpture displays.

Additional arts-focused features within the units will include open floor plans and durable flooring, millwork, and countertops.

Unit Summary			
Unit Type	# Units 4% Option	# Units 9% Option	Size
1 Bedroom	39	34	610 - 730 sf
2 Bedroom/ 1 Bath	12	12	885 - 955 sf
3 Bedroom/ 2 Bath	20	20	1,160 sf
Total	71	66	

Landmark towers with active programming uses

Activated spaces are clustered along Norton and in Lot F. The building on Lot F will contain a residential entry, arts display area, services space, and a media lab. The smaller building on Lot N will house an arts studio, classroom, and gallery space. Together the arts studio and gallery space front Norton and will be visible from Howard Ave.

Here is more about specific community spaces within the Burlingame Arts Colony.

- 1. An Idea Lab** will be housed in the building on the Lot N side. The Idea Lab is where the process of doing and understanding takes place. It is messy, non-precious space where people can experiment with the creation and communication of ideas. We hope to include in this space pottery wheels, easels, a spray box, and supply storage.
- 2. An Art Gallery** will also be housed in the tower at the parking court. A gallery is iconic in nature and this one should be utilized by tenants and broader community members alike. It can be occupied by physical art, musical arts, or used for small performance space or readings.

3. **Digital and Media Lab.** This space will be a hazard-free area for children to use for arts and education.
4. **Outdoor Work Decks** will be available to flats on the podium level that backup onto the central outdoor plaza. The outdoor work decks serve the same purpose as the Idea Lab but are primarily for sculpture. These decks are eight feet deep.

Iconic arts-related entry

The Burlingame Arts Colony building will provide an iconic architecture that can be seen from Howard Avenue. This arts-related facade will draw patrons farther east on their way to and from the Caltrain station.

The Lot F parking structure will include wide sidewalks and lush landscaping that links the structure to Lorton. This small section that connects Lot F to Lorton will be transformed into an Arts Garden, with maker spaces, raised planter beds, and outdoor performance space. This space will instantly become a key attraction downtown.

The building façade will tell a story about BAC, its occupants, its programs, and its community linkages. The ground floor community center on Lot N reveals a messy fine arts lab next to an arts gallery and the common areas. Visitors are instantly confronted with the Colony's mission: to provide tools and opportunity for original thinking and imagination, and to give people the confidence to transform these ideas into works of value. As a gallery should, this story changes with who is using the spaces.

Other Amenities

The project will also have other amenities to ease living, including:

- » On-site laundry
- » Tot lot
- » Offices for property managers and social service providers
- » ADA accessible units
- » Manager's unit

Unit Mix

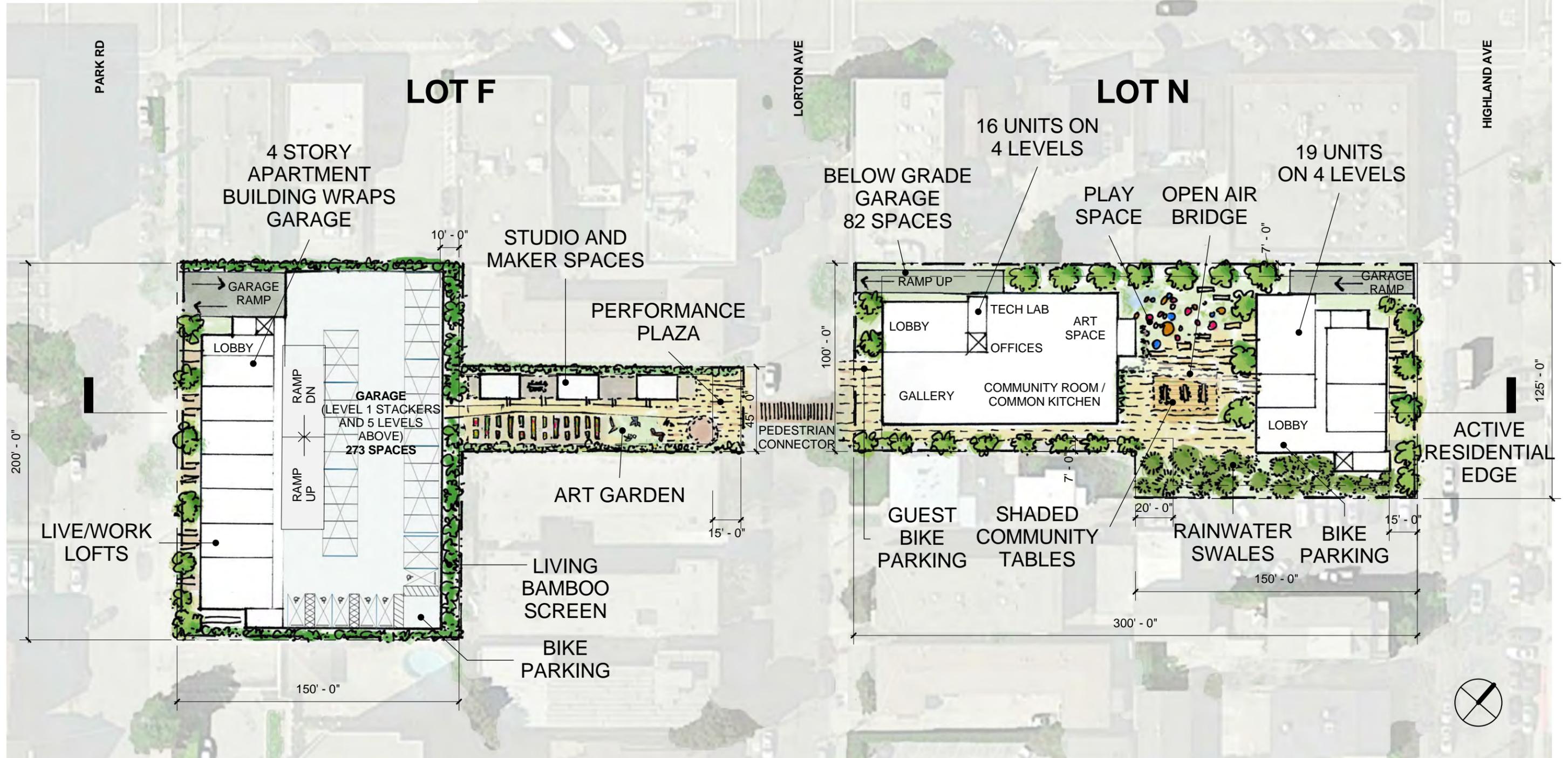
Unit Breakdown				
Bedrooms	AMI	No. of Units 9%	No. of Units 4%	
1 BR	30%	5	0	
1 BR	40%	4	0	
1 BR	50%	17	2	
1 BR	60%	8	37	
2 BR	30%	3	0	
2 BR	40%	2	0	
2 BR	50%	4	2	
2 BR	60%	2	9	
3 BR	30%	3	0	
3 BR	40%	4	0	
3 BR	50%	8	2	
3 BR	60%	5	18	
Total		65	70	
2 BR	Manager	1	1	

LOT INFORMATION:

- 1. MAX. HEIGHT IS 6 STORIES OR 75' (ABOVE 55' REQUIRED CONDITIONAL USE PERMIT)
- 2. MAX. LOT COVERAGE IS 50%

REQUIRED PARKING:

1 BED/STUDIO	1.0
2 BED	1.5
3 BED OR MORE	2.0
RETAIL	-
OFFICE PER 300 SF	1.0



Meta Housing Corporation

BURLINGAME ARTS COMMUNITY

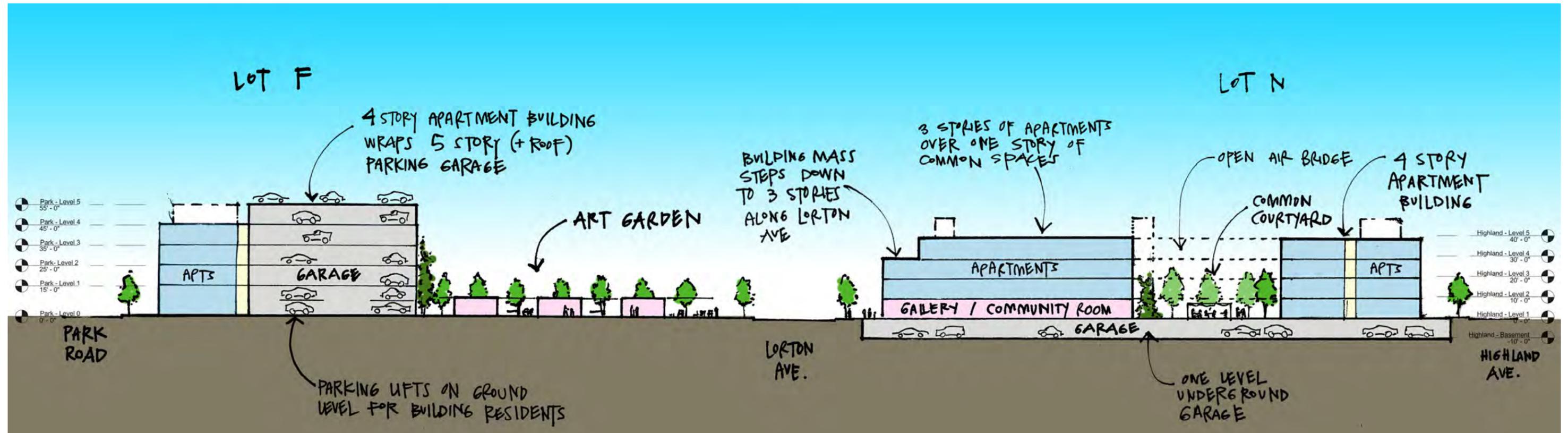
P1423
 scale: 1" = 50'-0"
 date: 1.26.2015

A.1

Site Aerial



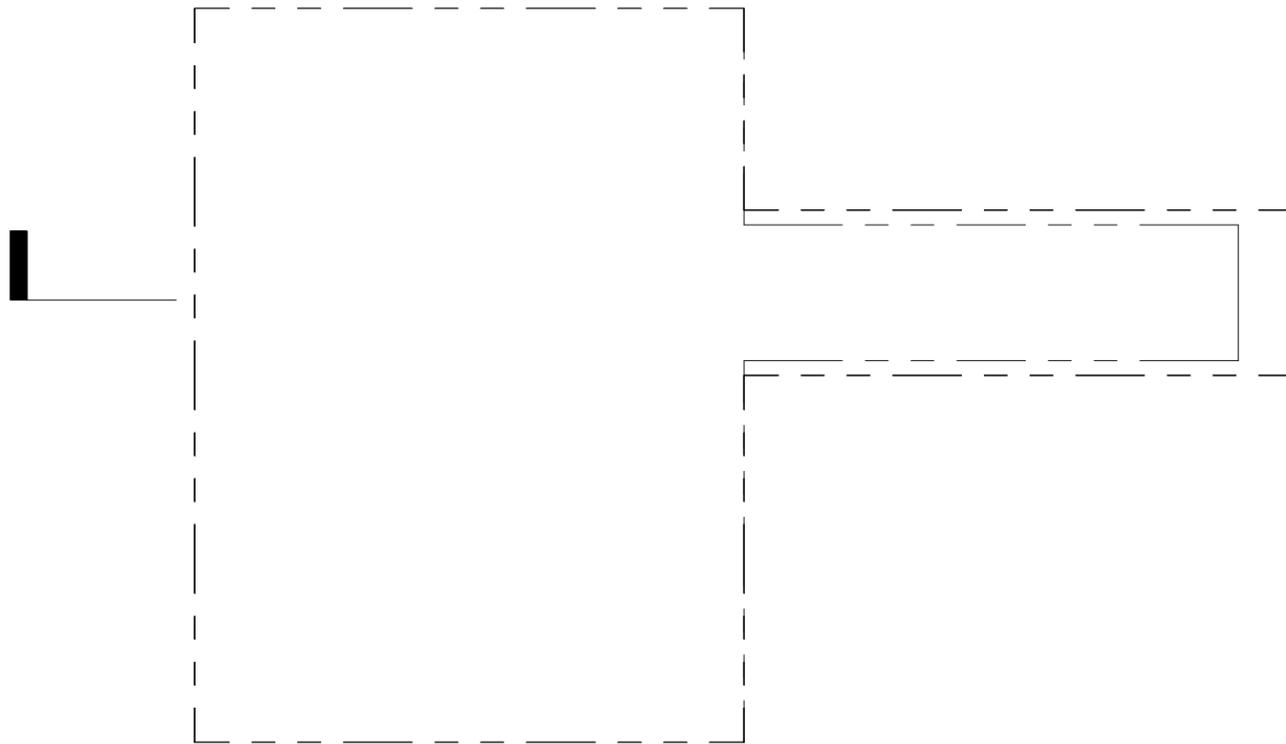
Site Section



Basement Floor Plan

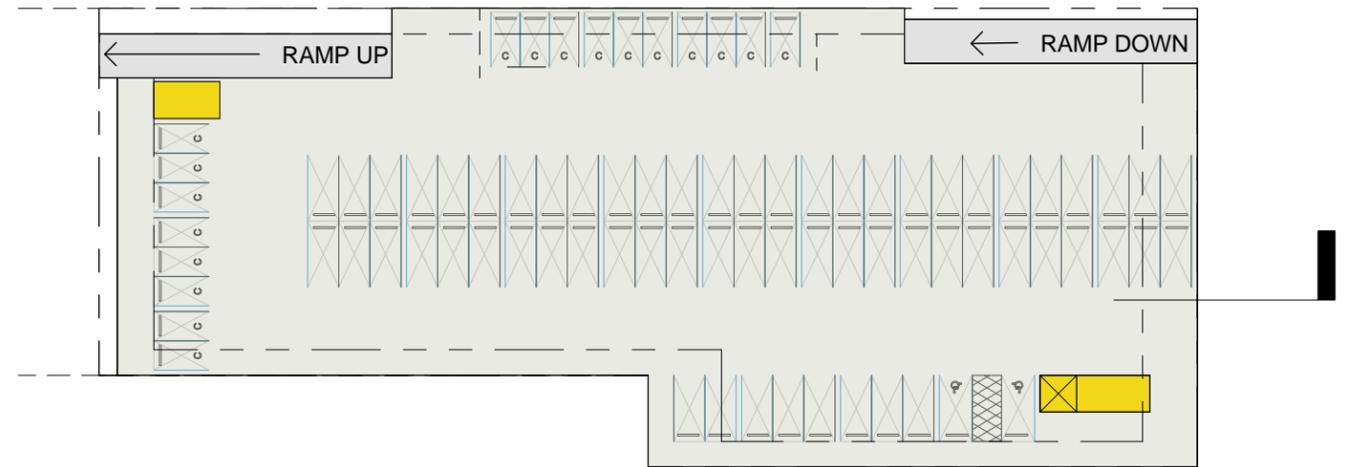
LOT F

GARAGE
273 SPACES



LOT N

GARAGE
82 SPACES

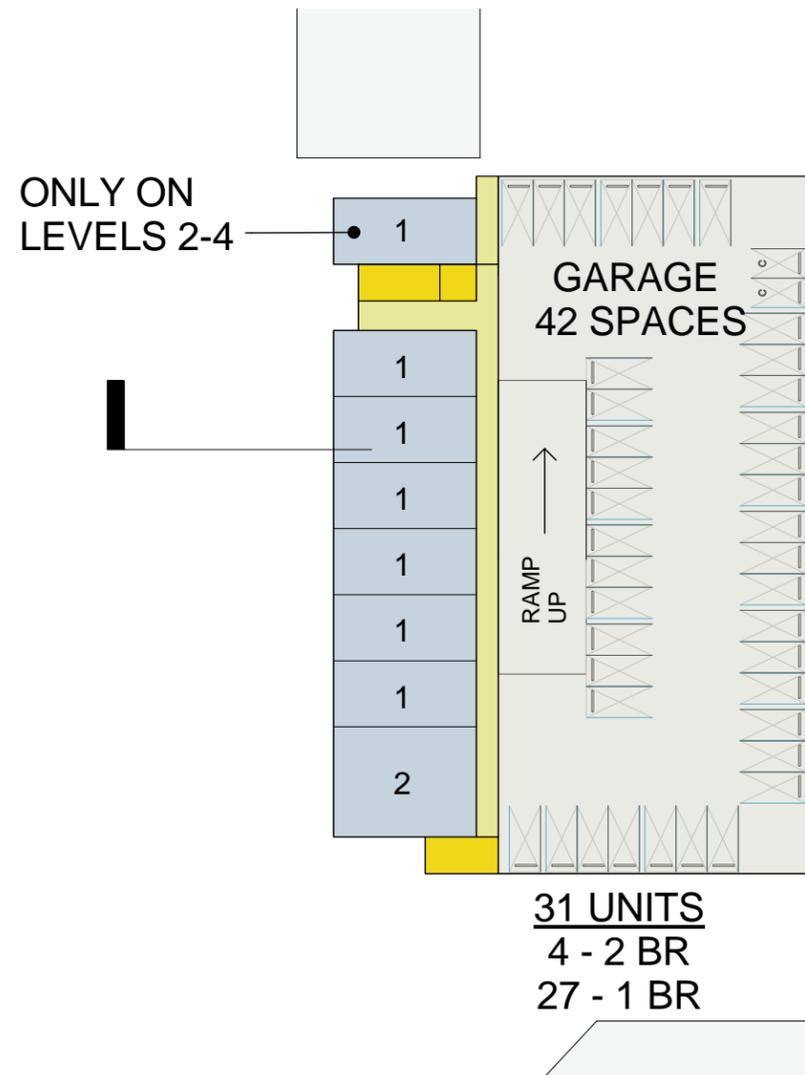


PARKING COUNT

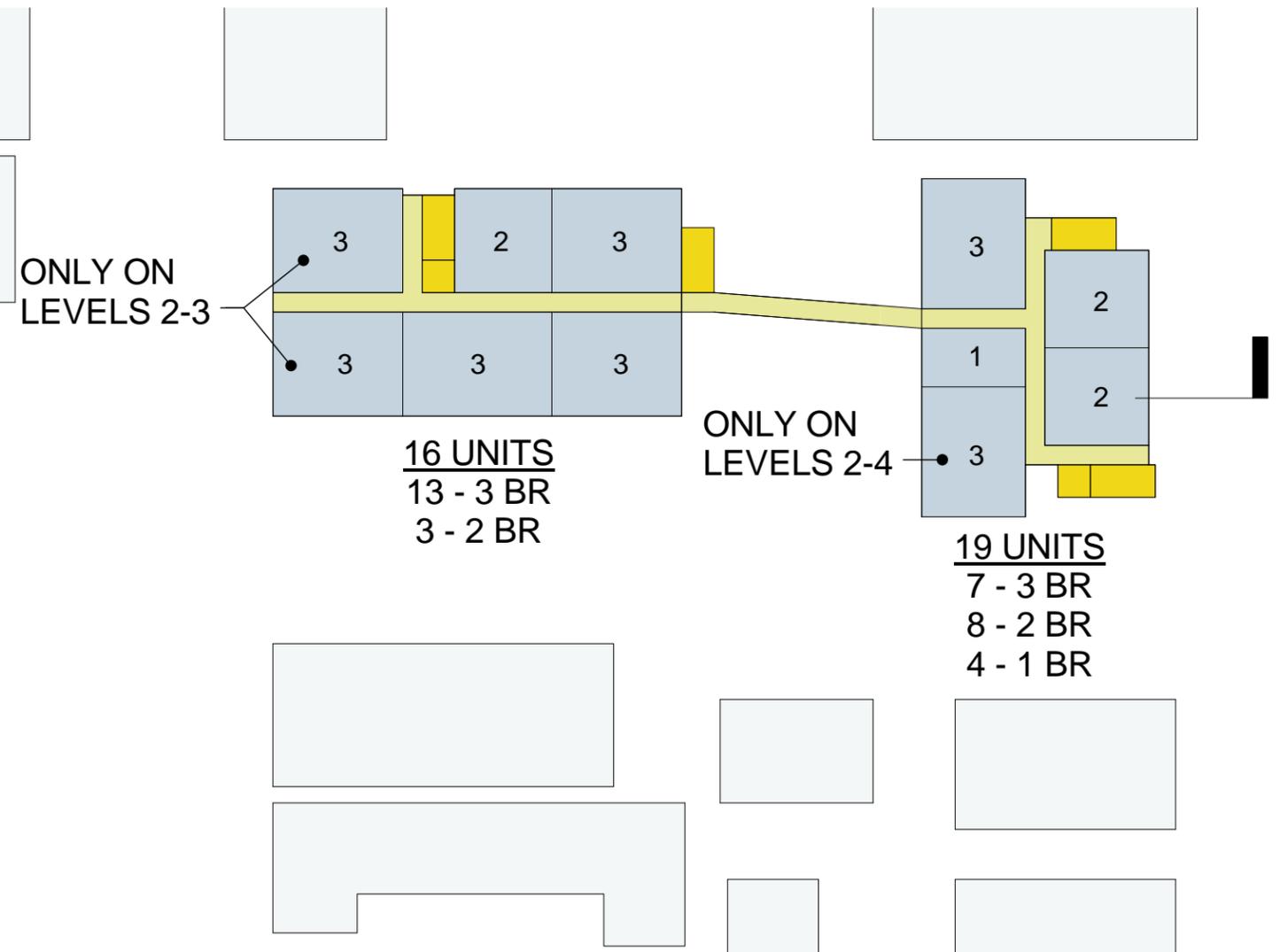
LOT F	273 SPACES
LOT N	<u>82 SPACES</u>
	355 SPACES

Typical Upper Floor Plan

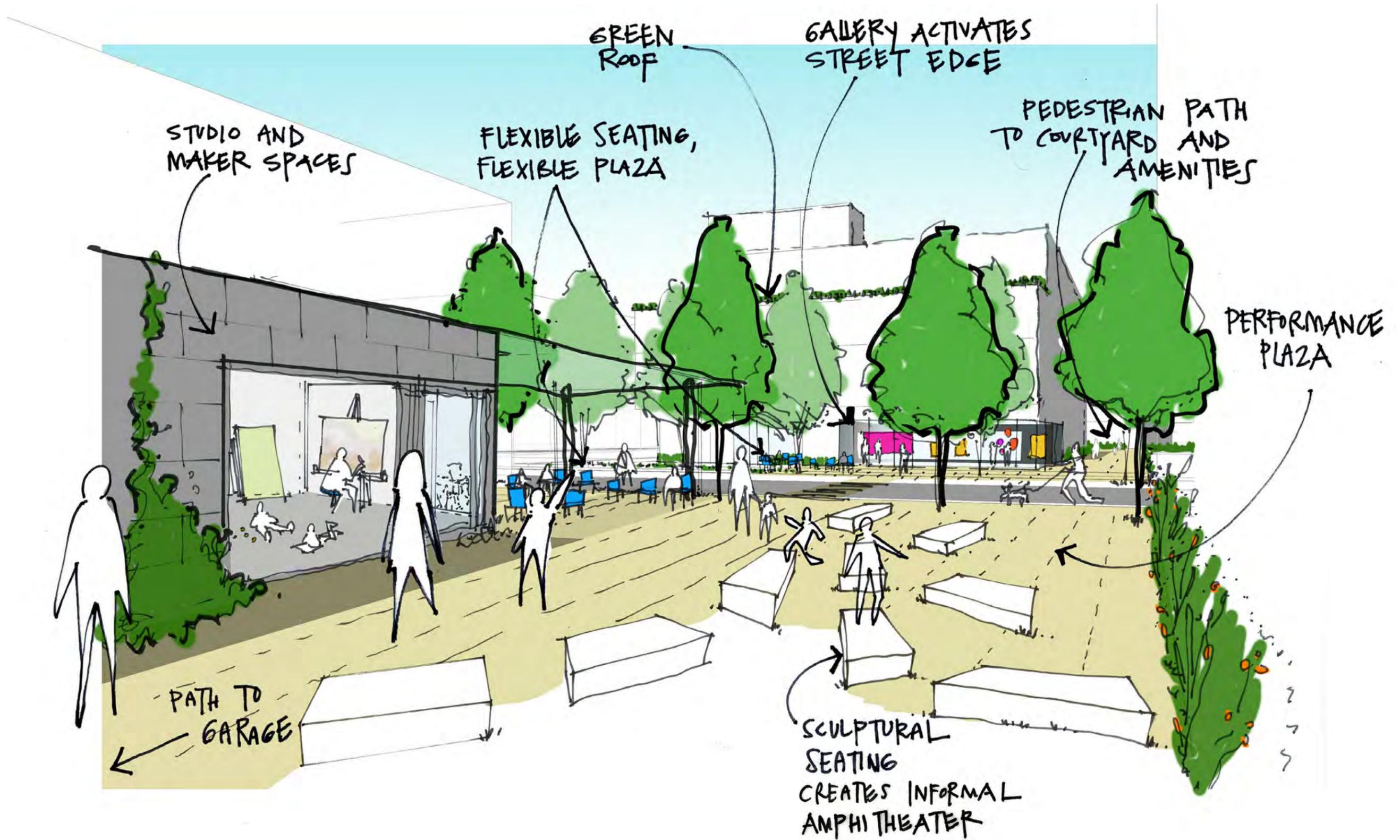
LOT F



LOT N



Art Garden Vignette



Project Design Precedents



ART GARDEN



SCULPTURAL PATHWAYS



DYNAMIC CIRCULATION



KIDS' PLAY AREA



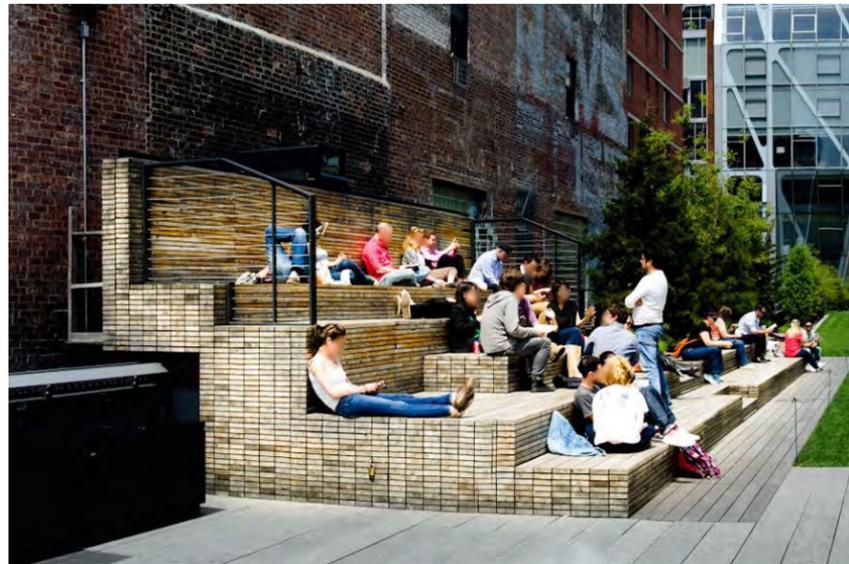
COLLABORATIVE SPACES



RAINWATER BIOSWALE



IMAGINATIVE OPPORTUNITIES



AMPHITHEATER SPACES



URBAN AGRICULTURE



FARM KIDS

Project Design Precedents



COMMUNITY TABLE



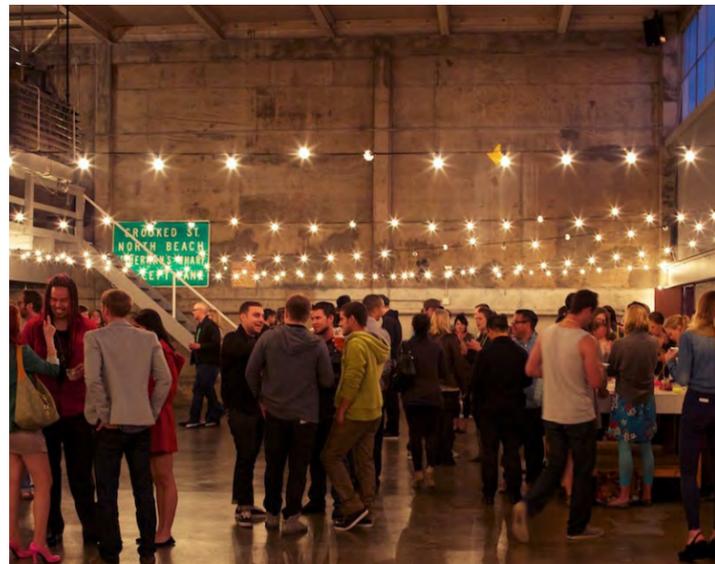
COMMUNITY KITCHEN



INDOOR-OUTDOOR SPACE



CONNECTED COMMUNITY



EVENT SPACE



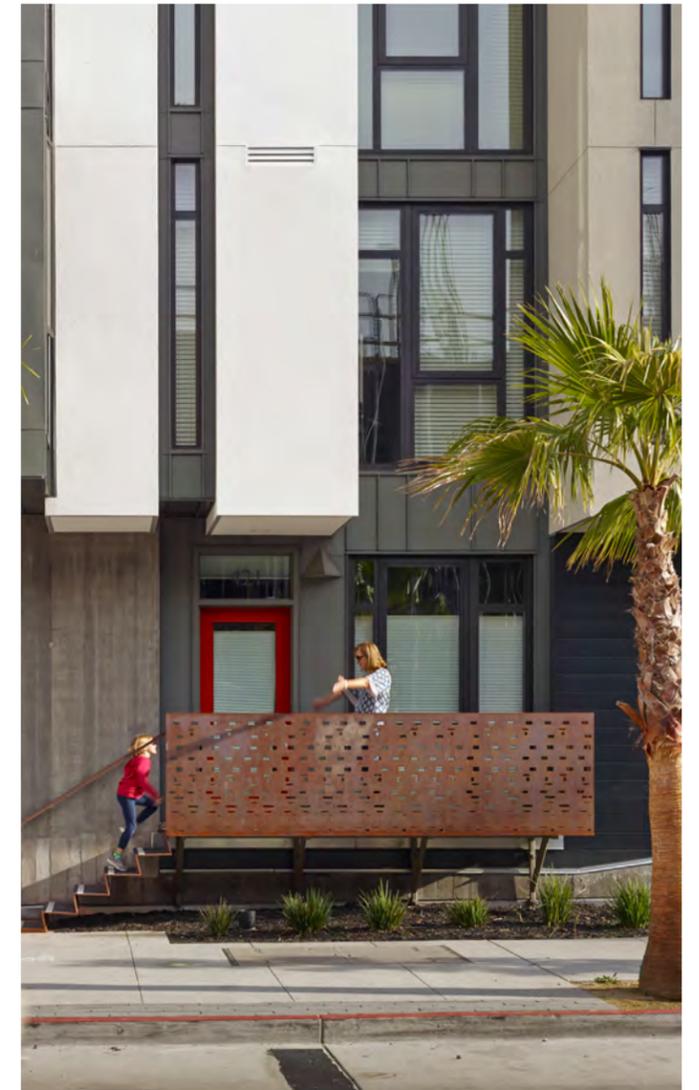
HOUSING ABOVE GALLERY AND COMMUNITY SPACE



GALLERY SPACE



CREATIVE CULTURE



ACTIVE RESIDENTIAL EDGES

C

Project Financials: 9% Option

Sources and Uses

Sources - Permanent

	Total
Investor Equity	21,012,524
Permanent Loan	6,352,073
EIFD/Parking Structure Financing	2,400,000
San Mateo County CDBG	500,000
Burlingame Land Contribution	8,500,000
Impact Fee Loan - City	4,000,000
Deferred Developer Fee	1,030,294
General Partner Equity	100
Total	43,794,991

Uses

	Total Residential
Land Cost/Acquisition	8,545,000
Construction (Including parking structure)	23,698,184
Architect and Engineering	1,505,000
Financing	1,095,160
Legal Fees	175,000
Reserves	189,399
Other Soft Costs	8,587,248
Total	43,794,991

Residential Rent Assumptions and Unit Mix

Affordable Units 30%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	5	622	33	589	2,945
Two Bedroom	3	747	40	707	2,121
Three Bedroom	3	863	49	814	2,442
Total	11				7,508

Affordable Units 40%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	4	830	33	797	3,188
Two Bedroom	2	997	40	957	1,914
Three Bedroom	4	1,151	49	1,102	4,408
Total	10				9,510

Affordable Units 50%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	8	1,245	33	1,212	9,696
Two Bedroom	2	1,495	40	1,455	2,910
Three Bedroom	5	1,727	49	1,678	8,390
Total	15				20,996

Affordable Units 60%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	8	1,245	33	1,212	9,696
Two Bedroom	2	1,495	40	1,455	2,910
Three Bedroom	5	1,727	49	1,678	8,390
Total	15				20,996

Manager Units

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
Two Bedroom	1	-	-	-	-
Total	1				-

Project Budget

	Total Cost	Residential Cost	Commercial Cost	TCAC Basis
LAND COST/ACQUISITION		95%	5%	
Land Cost or Value	8,500,000	8,075,000	425,000	-
Demolition	10,000	9,500	500	-
Legal	35,000	33,250	1,750	-
Subtotal Land Cost / Acquisition Cost	8,545,000	8,117,750	427,250	-
NEW CONSTRUCTION				
Site Work	1,250,000	1,187,500	62,500	1,187,500
Structures				
Community Center / Management	520,000	520,000	-	520,000
Residential Parking	2,252,160	2,252,160	-	2,252,160
Parking Structure	2,750,000	-	2,750,000	1,250,000
Residential	13,100,000	13,100,000	-	13,100,000
General Requirements	1,117,330	1,061,463	55,866	700,566
Contractor Overhead	372,443	353,821	18,622	233,522
Contractor Profit	1,117,330	1,061,463	55,866	700,566
Construction Contingency	899,170	854,212	44,959	563,780
General Liability Insurance	269,751	256,264	13,488	169,134
LEED	50,000	47,500	2,500	47,500
Subtotal New Construction Costs	23,698,184	20,694,383	3,003,801	20,724,727
ARCHITECTURAL FEES				
Design	950,000	902,500	47,500	812,250
Supervision	275,000	261,250	13,750	235,125
Landscape Architect	40,000	38,000	2,000	34,200
Subtotal Architectural Costs	1,265,000	1,201,750	63,250	1,081,575
SURVEY & ENGINEERING				
Civil engineer	100,000	95,000	5,000	76,000
Survey	20,000	19,000	1,000	15,200
Geotech	120,000	114,000	6,000	91,200
Subtotal Survey & Engineering	240,000	228,000	12,000	182,400
CONSTRUCTION Financing				
Construction Loan Interest	534,922	508,176	26,746	381,132
Origination Fee	148,589	141,160	7,429	141,160
Insurance	355,473	337,699	17,774	337,699
Title & Recording	35,000	33,250	1,750	33,250
Subtotal Construction Interest & Fees	1,073,984	1,020,285	53,699	893,241
PERMANENT FINANCING				
Loan Origination Fee	11,176	10,617	559	10,617
Title & Recording	10,000	9,500	500	9,500
Subtotal Permanent Financing Costs	21,176	20,117	1,059	20,117

Project Budget

	Total Cost	Residential Cost	Commercial Cost	TCAC Basis
LEGAL FEES				
Lender Legal Paid by Applicant	50,000	47,500	2,500	30,875
Other (transaction)	125,000	118,750	6,250	77,188
Subtotal Attorney Costs	175,000	166,250	8,750	108,063
RESERVES				
3-Month Operating Reserve	189,399	189,399	-	-
Subtotal Reserve Costs	189,399	189,399	-	-
APPRAISAL				
Appraisal	15,000	14,250	750	14,250
Subtotal Appraisal Costs	15,000	14,250	750	14,250
OTHER PROJECT COSTS				
TCAC App/Allocation/Monitoring Fees	177,836	177,836	-	177,836
Environmental Audit	5,200	4,940	260	4,940
Soils Report	8,000	7,600	400	7,600
Local Development Impact Fees	5,000,000	5,000,000	-	5,000,000
Permit Processing Fees	529,000	502,550	26,450	502,550
Marketing	46,200	43,890	2,310	43,890
Furnishings	250,000	250,000	-	250,000
Market Study	8,000	8,000	-	8,000
Lender Inspections	16,000	15,200	800	15,200
Subtotal Other Costs	6,040,236	6,010,016	30,220	6,010,016
Soft Costs Contingency (5%)	302,012	286,911	15,101	243,875
DEVELOPER COSTS				
Developer Fee - Residential	2,000,000	2,000,000	-	2,000,000
Developer Fee - Parking Garage	200,000	-	200,000	-
Subtotal Developer Costs	2,200,000	2,000,000	200,000	2,000,000
SYNDICATION COSTS				
Cost certification	15,000	14,250	750	-
Partnership formation & taxes	15,000	14,250	750	-
Subtotal Syndication Costs	30,000	28,500	1,500	-
TOTAL PROJECT COSTS	43,794,991	39,977,611	3,817,380	31,278,263

Operating Budget

Assumptions					
Rent Increase	2.50%	Reserves Inc	3%	Units	66
Exp Increase	3.50%	Vacancy Rate	5%	Opex per unit	5,400

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
RESIDENTIAL Income															
Gross Residential Income	852,516	873,829	895,675	918,066	941,018	964,544	988,657	1,013,374	1,038,708	1,064,676	1,091,293	1,118,575	1,146,539	1,175,203	1,204,583
Miscellaneous Income (laundry)	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412	5,412
Vacancy (5%)	(42,626)	(43,691)	(44,784)	(45,903)	(47,051)	(48,227)	(49,433)	(50,669)	(51,935)	(53,234)	(54,565)	(55,929)	(57,327)	(58,760)	(60,229)
EFFECTIVE GROSS INCOME	815,302	835,549	856,303	877,575	899,379	921,728	944,636	968,117	992,185	1,016,854	1,042,140	1,068,058	1,094,624	1,121,855	1,149,766
RESIDENTIAL Expenses															
Residential Operating Expenses	(356,400)	(368,874)	(381,785)	(395,147)	(408,977)	(423,291)	(438,107)	(453,440)	(469,311)	(485,737)	(502,737)	(520,333)	(538,545)	(557,394)	(576,903)
Replacement Reserve	(16,500)	(16,995)	(17,505)	(18,030)	(18,571)	(19,128)	(19,702)	(20,293)	(20,902)	(21,529)	(22,175)	(22,840)	(23,525)	(24,231)	(24,958)
Total Expenses	(372,900)	(385,869)	(399,289)	(413,177)	(427,548)	(442,419)	(457,808)	(473,733)	(490,212)	(507,265)	(524,912)	(543,173)	(562,070)	(581,625)	(601,860)
NET OPERATING INCOME	442,402	449,680	457,013	464,398	471,831	479,309	486,828	494,384	501,972	509,589	517,228	524,885	532,554	540,230	547,905
Debt Service	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)	(384,698)
NET CASH FLOW	57,705	64,983	72,316	79,701	87,134	94,611	102,130	109,686	117,275	124,891	132,530	140,187	147,857	155,532	163,208
<i>Debt Coverage Ratio</i>	<i>1.15</i>	<i>1.17</i>	<i>1.19</i>	<i>1.21</i>	<i>1.23</i>	<i>1.25</i>	<i>1.27</i>	<i>1.29</i>	<i>1.30</i>	<i>1.32</i>	<i>1.34</i>	<i>1.36</i>	<i>1.38</i>	<i>1.40</i>	<i>1.42</i>
Distribution of Cash Flow															
Net Cash Flow	57,705	64,983	72,316	79,701	87,134	94,611	102,130	109,686	117,275	124,891	132,530	140,187	147,857	155,532	163,208

D

Project Financials: 4% Option

Sources and Uses

Sources - Permanent

	Total
Investor Equity	14,155,868
Permanent Loan	10,589,665
IFD Financing (parking structure)	4,566,840
San Mateo County CDBG	500,000
Burlingame Land Contribution	8,500,000
Impact Fee Loan - City	4,000,000
Deferred Developer Fee	1,000,000
General Partner Equity	100
Total	43,312,474

Uses

	Total Residential
Land Cost/Acquisition	8,545,000
Construction (Including Parking Structure)	23,083,961
Architect and Engineering	1,505,000
Financing	794,987
Legal Fees	175,000
Reserves	250,636
Other Soft Costs	8,957,890
Total	43,312,474

Residential Rent Assumptions and Unit Mix

Affordable Units 50%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	2	1,038	33	1,005	2,010
Two Bedroom	2	1,246	40	1,206	2,412
Three Bedroom	2	1,439	49	1,390	2,780
Total	6				7,202

Affordable Units 60%AMI

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
One Bedroom	37	1,245	33	1,212	44,844
Two Bedroom	9	1,495	40	1,455	13,095
Three Bedroom	18	1,727	49	1,678	30,204
Total	64				88,143

Manager Units

	Number of Units	Gross Rents	Utility Allowance	Net Rents	Monthly Total
Two Bedroom	1	-	-	-	-
Total	1				-

Project Budget

	Total Cost	Residential Cost	Commercial Cost	TCAC Basis
LAND COST/ACQUISITION		94%	6%	
Land Cost or Value	8,500,000	7,990,000	510,000	-
Demolition	10,000	9,400	600	-
Legal	35,000	32,900	2,100	-
Subtotal Land Cost / Acquisition Cost	8,545,000	8,032,300	512,700	-
NEW CONSTRUCTION				
Site Work	1,250,000	1,175,000	75,000	1,175,000
Structures		-	-	
Community Center / Management	520,000	520,000	-	520,000
Residential Parking	1,340,000	1,340,000	-	1,340,000
Commercial Parking Structure	2,000,000	-	2,000,000	-
Residential	14,250,000	14,250,000	-	14,250,000
General Requirements	1,086,600	1,021,404	65,196	674,127
Contractor Overhead	362,200	340,468	21,732	224,709
Contractor Profit	1,086,600	1,021,404	65,196	674,127
Construction Contingency	875,816	823,267	52,549	543,356
General Liability Insurance	262,745	246,980	15,765	163,007
LEED	50,000	47,000	3,000	47,000
Subtotal New Construction Costs	23,083,961	20,785,523	2,298,438	19,611,325
ARCHITECTURAL FEES				
Design	950,000	893,000	57,000	803,700
Supervision	275,000	258,500	16,500	232,650
Landscape Architect	40,000	37,600	2,400	33,840
Subtotal Architectural Costs	1,265,000	1,189,100	75,900	1,070,190
SURVEY & ENGINEERING				
Civil engineer	100,000	94,000	6,000	75,200
Survey	20,000	18,800	1,200	15,040
Geotech	120,000	112,800	7,200	90,240
Subtotal Survey & Engineering	240,000	225,600	14,400	180,480
CONSTRUCTION Financing				
Construction Loan Interest	164,423	154,557	9,865	115,918
Origination Fee	45,673	42,933	2,740	42,933
Bond Issuance Fees	175,000	164,500	10,500	-
Insurance	346,259	325,484	20,776	325,484
Title & Recording	35,000	32,900	2,100	32,900
Subtotal Construction Interest & Fees	766,355	720,374	45,981	517,234
PERMANENT FINANCING				
Loan Origination Fee	18,631	17,514	1,118	-
Title & Recording	10,000	9,400	600	-
Subtotal Permanent Financing Costs	28,631	26,914	1,718	-

Project Budget

	Total Cost	Residential Cost	Commercial Cost	TCAC Basis
LEGAL FEES				
Lender Legal Paid by Applicant	50,000	47,000	3,000	30,550
Other (transaction)	125,000	117,500	7,500	76,375
Subtotal Attorney Costs	175,000	164,500	10,500	106,925
RESERVES				
3-Month Operating Reserve	250,636	250,636	-	-
Subtotal Reserve Costs	250,636	250,636	-	-
APPRAISAL				
Appraisal	15,000	14,100	900	14,100
Subtotal Appraisal Costs	15,000	14,100	900	14,100
OTHER PROJECT COSTS				
TCAC App/Allocation/Monitoring Fees	43,639	43,639	-	43,639
Environmental Audit	5,200	4,888	312	4,888
Soils Report	8,000	7,520	480	7,520
Local Development Impact Fees	5,000,000	5,000,000	-	5,000,000
Permit Processing Fees	536,500	504,310	32,190	504,310
Marketing	49,700	46,718	2,982	46,718
Furnishings	250,000	250,000	-	250,000
Market Study	8,000	8,000	-	8,000
Lender Inspections	16,000	15,040	960	15,040
Subtotal Other Costs	5,917,039	5,880,115	36,924	5,880,115
Soft Costs Contingency (5%)	295,852	278,101	17,751	236,386
DEVELOPER COSTS				
Developer Fee - Residential	2,500,000	2,500,000	-	2,500,000
Developer Fee - Parking Garage	200,000	-	200,000	-
Subtotal Developer Costs	2,700,000	2,500,000	200,000	2,500,000
SYNDICATION COSTS				
Cost certification	15,000	14,100	900	-
Partnership formation & taxes	15,000	14,100	900	-
Subtotal Syndication Costs	30,000	28,200	1,800	-
TOTAL PROJECT COSTS	43,312,474	40,095,462	3,217,012	30,116,755

Operating Budget

Assumptions					
Rent Increase	2.50%	Reserves Inc	3%	Units	66
Exp Increase	3.50%	Vacancy Rate	5%	Opex per unit	5,400

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
RESIDENTIAL Income															
Gross Residential Income	1,144,140	1,172,744	1,202,062	1,232,114	1,262,916	1,294,489	1,326,852	1,360,023	1,394,023	1,428,874	1,464,596	1,501,211	1,538,741	1,577,210	1,616,640
Miscellaneous Income (laundry)	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822	5,822
Vacancy (5%)	(57,207)	(58,637)	(60,103)	(61,606)	(63,146)	(64,724)	(66,343)	(68,001)	(69,701)	(71,444)	(73,230)	(75,061)	(76,937)	(78,860)	(80,832)
EFFECTIVE GROSS INCOME	1,092,755	1,119,928	1,147,781	1,176,330	1,205,593	1,235,587	1,266,331	1,297,844	1,330,144	1,363,252	1,397,188	1,431,972	1,467,626	1,504,171	1,541,630
RESIDENTIAL Expenses															
Residential Operating Expenses	(383,400)	(396,819)	(410,708)	(425,082)	(439,960)	(455,359)	(471,296)	(487,792)	(504,865)	(522,535)	(540,824)	(559,752)	(579,344)	(599,621)	(620,607)
Replacement Reserve	(17,750)	(18,283)	(18,831)	(19,396)	(19,978)	(20,577)	(21,194)	(21,830)	(22,485)	(23,160)	(23,855)	(24,570)	(25,307)	(26,066)	(26,848)
Total Expenses	(401,150)	(415,102)	(429,539)	(444,478)	(459,938)	(475,936)	(492,491)	(509,622)	(527,350)	(545,695)	(564,678)	(584,323)	(604,651)	(625,687)	(647,456)
NET OPERATING INCOME	691,605	704,827	718,242	731,852	745,655	759,651	773,840	788,222	802,795	817,558	832,510	847,650	862,975	878,484	894,174
Debt Service	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)	(601,396)
NET CASH FLOW	90,209	103,431	116,847	130,456	144,259	158,255	172,444	186,826	201,399	216,162	231,114	246,254	261,579	277,088	292,778
<i>Debt Coverage Ratio</i>	<i>1.15</i>	<i>1.17</i>	<i>1.19</i>	<i>1.22</i>	<i>1.24</i>	<i>1.26</i>	<i>1.29</i>	<i>1.31</i>	<i>1.33</i>	<i>1.36</i>	<i>1.38</i>	<i>1.41</i>	<i>1.43</i>	<i>1.46</i>	<i>1.49</i>
Distribution of Cash Flow															
Net Cash Flow	90,209	103,431	116,847	130,456	144,259	158,255	172,444	186,826	201,399	216,162	231,114	246,254	261,579	277,088	292,778

4

ANTICIPATED PROJECT TIMELINE

Development Timeline

Identify a rough timeline for the project, including how soon the firm would expect to complete the entitlement process, secure financing, and begin and complete project construction. Summarize your estimates for market absorption for the dwelling units within the project. Also indicate if the firm would pursue a phased project, or would anticipate building the entire project in a single phase. If the project is proposed to be phased, identify the breakdown of each phase and how long the overall project would take to complete.

DATE	MILESTONE
February 2015	RFP submitted to City (90 days)
April 2015	Developer Selected, enter into ENA (90 days)
May 2015	Developer begins outreach to community groups, stakeholders, and City Officials
February 2016	Secure entitlements for project
February 2016	City/Developer enter Development Agreement
March 2016	4% or 9% Tax Credit Application submitted
June 2016	4% or 9% Tax Credit Award
November 2016	Secure building permit, remaining financing
November 2016	Commence construction
August 2017	Commence tenant selection process
November 2018	Complete construction (24 months)
November 2018	Complete lease-up

Lease-Up and Timing

Across our portfolio, we have deep experience showing that lease up will be completed within the first months after the project opens.

Our latest Arts Colony to complete lease up was the San Pedro Pacific Arts Colony. This project is fully leased although it has not even opened yet. The Pacific Arts Colony received many times more applications than there are units, and in addition to being already fully leased there is a waiting list of hundreds of potential residents.

In Burlingame, the acute shortage of affordable housing will likely result in hundreds, if not thousands, of applications from qualified local tenants.

We will begin accepting applications in the months before construction is completed so that move-ins can begin immediately after occupancy permits are issued.

Phasing

We anticipate completing this project as one contiguous phase. We can work with the City to carve the public parking structure out as a standalone phase if necessary or preferable..

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REFERENCES

References

Provide three (3) references from other cities or counties within which the firm has developed similar projects. You may also provide any additional references you believe would be helpful in providing us with a more complete understanding of your professional experience in completing similar projects.

Construction Lenders

BANK OF AMERICA

Charmaine Atherton
Vice President
333 South Hope Street
11th Floor
Los Angeles, CA 90071
P (213) 621-4816
chamaïne.atherton@bankofamerica.com

Meta Projects:

- » Chinatown Metro Apartments
- » Adams & Central Mixed Use Devt
- » Vermont Senior Apartments

JP MORGAN CHASE BANK

Alice Carr, Senior Vice President -
Western Regional Manager
300 S. Grand
4th Floor
Los Angeles, CA 90071
P (213) 621-8396
alice.carr@chase.com

Meta Projects:

- » Magnolia at Highland
- » Tobias Terrace Apartments
- » Valerio Woods

WELLS FARGO BANK

John Epstein
National Manager
Community Lending & Investment
707 Wilshire Blvd Suite 1800
Los Angeles, CA 90017
P (503) 886-2587
jepstein@wellsfargo.com

Meta Projects:

- » Long Beach Regal
- » San Clemente Senior Apartments
- » Long Beach Senior Artist Colony

Permanent Lenders

CALIFORNIA COMMUNITY REINVESTMENT CORPORATION (CCRC)

Mary Kaiser
President
225 W. Broadway, Suite 120
Glendale, CA 91204
P (818) 550-9801
mary.kaiser@e-ccrc.org

Meta Projects:

- » Adams & Central Mixed Use Devt
- » Vermont Senior Apartments
- » Tavarua Senior Apartments

CITI COMMUNITY CAPITAL

Richard Gerwitz
Senior Vice President
444 South Flower Street
29th Floor
Los Angeles, CA 90071
P (213) 486-7138
richard.gervitz@citi.com

Meta Projects:

- » Buckingham Senior Apartments
- » Cantabria Senior Apartments
- » The Grove at Sunset Court

JP MORGAN CHASE BANK

Alice Carr, Senior Vice President -
Western Regional Manager
300 S. Grand
4th Floor
Los Angeles, CA 90071
P (213) 621-8396
alice.carr@chase.com

Meta Projects:

- » Figueroa Senior Housing

General Contractors

COBALT CONSTRUCTION COMPANY

Larry Persons
2259 Ward Avenue, Suite 200
Simi Valley, California 93065
P (805) 577-6222
F (805) 582-5053
larry.persons@cobaltcc.com

Meta Projects:

- » Coventry Court
- » Long Beach & Burnett
- » Adams & Central

OPTIMUS CONSTRUCTION

Jeff Boysen
440 Western Avenue, Suite 202
Glendale, CA 91201
P (818) 550-8411
F (818) 550-9411
jeff@optimusconstruction.com

Meta Projects:

- » Magnolia at Highland
- » Asturias Senior Apartments
- » NoHo Senior Artists Colony

MIDSTATE CONSTRUCTION CORPORATION

Monica Soiland Nelson
1180 Holm Road
Petaluma, CA 94954
P (707) 559-2325
F (707) 762-0700
monicasn@midstateconstruction.com

Meta Projects:

- » The Grove at Sunset Court

Low Income Housing Tax Credit Limited Partner Investors

WELLS FARGO/WACHOVIA

Timothy J. McCann
Senior Vice President
45 Fremont Street, 9th Floor
MAC# A0194-090
San Francisco, CA 94105
P (415) 975-6334
tim.mccann@wellsfargo.com

Meta Projects:

- » San Clemente Senior Apartments
- » Long Beach Senior Artist Colony
- » Magnolia at Highland

RED STONE EQUITY PARTNERS

Don Snyder
Senior Vice President
200 Public Square
Suite 1550
Cleveland, OH 44114
P (216) 820-4754
don.snyder@redstoneequity.com

Meta Projects:

- » Buckingham Senior Apartments
- » 5555 Hollywood
- » Cantabria Senior Apartments

BANK OF AMERICA

Joseph Siu, SVP
Bank of America Merrill Lynch
Bank of America, N.A
P (949) 794-7181
F (804) 553-8698
Joseph.Siu@baml.com

Meta Projects:

- » Vermont Senior Apartments
- » Long Beach & Burnett
- » Adams & Central Mixed Use Devt

Public Agencies

CITY OF OAKLAND

Larry E. Reid
Vice Mayor- Councilmember District 7
One City Hall Plaza, 2nd Floor
Oakland, CA 94612
P (510) 238-7007
kevin.fincher@hcd.ocgov.com

Meta Projects:

- » Oakland 34
- » Civic Center

CITY OF LOS ANGELES HOUSING DEPT.

Manuel Bernal
Finance and Development Director
1200 West 7th Street, 8th Floor
Los Angeles CA 90017
P (213) 808-8901
manuel.bernal@lacity.org

Meta Projects:

- » Adams & Central
- » Vermont
- » Figueroa

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT

Eugene Lee
Section Chief- Department
2020 W. El Camino Ave
Sacramento, CA 95833
P (916) 324-1881
eulee@hcd.ca.gov

Meta Projects:

- » The Metro @ Chinatown Senior Lofts
- » The Metro @ Hollywood
- » Cotton's Point Senior Apartments

Community Group

COALITION FOR RESPONSIBLE COMMUNITY DEVELOPMENT

Mark Wilson
Executive Director
3101 S. Grand Ave.
Los Angeles, CA 90007
P (323) 992-8435
mwilson@coalitionrcd.org

Meta Projects:

- » Adams & Central
- » Vermont

Joint Development Partners

CENTURY HOUSING

Brian D'Andrea
Senior Vice President, Housing
1000 Corporate Pointe
Culver City, CA 90230
P (310) 642-2059
F (310) 642-2049
bdandrea@centuryhousing.org

Meta Projects:

- » Long Beach Senior Arts Colony
- » Heritage Park – Anaheim

WESTERN COMMUNITY HOUSING, INC.

Graham P. Espley-Jones
President
151 Kalmus Drive, Suite J-5
Costa Mesa, CA 92626
P (714) 549-4100 Ext. 101 / F (714) 549-4600
graham@wchousing.org

Meta Projects:

- » The Metro @ Chinatown Senior Lofts

6

APPENDIX

ARCHITECT
David Baker Architects



“No local firm has a better track record than David Baker Architects at mending the civic fabric....”

DAVID BAKER ARCHITECTS (DBA) is a progressive architecture firm in San Francisco that creates acclaimed buildings in urban environments. Formed in 1982, DBA is known for creating exceptional affordable housing, designing for density, and exploring urban solutions.

AFFORDABLE HOUSING EXPERIENCE

David Baker Architects has designed and built more than 8,000 dwelling units, including more than 5,700 affordable units throughout the San Francisco Bay Area. The firm's completed projects range from supportive housing for homeless families to a complete LEED Gold and Platinum neighborhood replacing decaying public housing. Our affordable housing design practice is bolstered and informed by work in other typologies, including market-rate housing, hospitality, interior architecture, and urban planning.

AWARD-WINNING DESIGN AND COMMITMENT

David Baker Architects has garnered more than 200 local and national design awards as well as certifications and accolades for the humaneness and sustainability of the firm's projects. *San Francisco Chronicle* urban design writer John King has said, “No local firm has a better track record than David Baker Architects at mending the civic fabric....” DBA was recently honored as the NPH's Visionary and Innovative Design Leader, and was selected as the AIA California Council 2012 Distinguished Practice. In 2010 David Baker received the Hearthstone Humanitarian Award, honoring the housing industry's 30 most influential people of the past 30 years.

LEADERSHIP IN GREEN BUILDING

From an early focus on sustainability, David Baker Architects has taken the lead in establishing green-building practices. DBA has participated in several LEED pilot programs and achieved the first LEED-NC Silver certification, the first LEED for Homes certification, the first LEED-ND Certified Gold Plan, and the largest LEED for Homes Platinum development in Northern California.



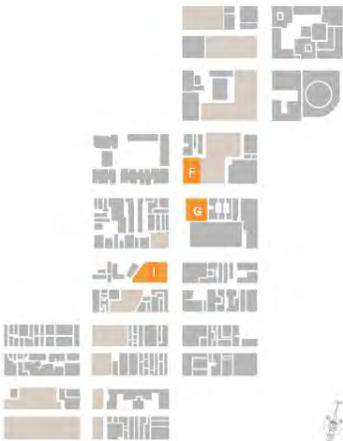


ACTIVE DESIGN PRINCIPLES

David Baker Architects designs thoughtful housing with creative common spaces and active, human-scale edges. We emphasize dynamic physical connections to the street and community areas and utilize strategies that enable and encourage social interaction and physical activity. We “wrap” parking garages with residential units to preserve lively sidewalks and incorporate such features as community agriculture, decompression courtyards, flexible spaces, and more. We believe that something as simple as secure and easily accessible bicycle parking may be the difference between biking and driving, and that a beautiful open-air stair is likely to trump an elevator. DBA staff publish and give presentations on topics of vibrant ground-floor design, streetscape strategies, and the strength of multi-use spaces.

URBAN SCALE AND CITY POLICY

David Baker Architects’ work ranges from contextual urban infill housing to pioneer buildings that set the stage for a new community, from rebuilt public-housing neighborhoods to a series of new buildings that strategically repair a rift in the urban fabric. Additionally we are working with the San Francisco Planning Department to determine the best ways to implement the City’s new density bonus and ensure that San Francisco sets the stage for practical, efficient, sufficient housing as the population grows and the housing needs increase.





David Baker

FAIA, LEED AP

Principal

David Baker founded San Francisco-based David Baker Architects in 1982, and in 1996 was selected as Fellow of the American Institute of Architects. The firm has received more than 180 architectural design awards and honors, including six national AIA awards.

David has been honored as the Non-Profit Housing Association's Visionary and Innovative Leader in Design and was chosen by the AIA California Council as the 2012 Distinguished Practice. In 2009, David received the Hearthstone Builders Humanitarian Award, being honored as one of the 30 most influential people in the housing industry of the past 30 years. This resum e reflects select and recent accomplishments.

db@dbarchitect.com

California Registration Number
C012506

education	Master of Architecture	University of California, Berkeley	1982
	Bachelor of Philosophy	Thomas Jefferson College	1974
		Phillips Exeter Academy	1967
teaching	UC Berkeley Joseph Esherick Visiting Associate Professor		2013
	Bruce Goff Creative Visiting Chair, University of Oklahoma		2009
	UC Berkeley, Visiting Associate Professor		2007, 1981
	John Portman Visiting Critic, Georgia Institute of Technology		2006
	California College of the Arts, School of Architectural Studies		2001, 1999
	Tulane University, New Orleans		1990
	Antioch West, San Francisco		1981
Vista College, Berkeley		1980	
select lectures	Affordable Housing Design Leadership Institute Keynote		2014
	Oregon Design Conference Keynote		2014
	University of Washington CBE Spring Lecture Series		2013
	MAS Summit for New York City, "Community Revitalization 2.0"		2012
	Brownfields 2011: Sustainable Communities Start Here, Philadelphia		2011
	USGBC Federal Summit, Washington D.C.		2010
	Banff Session, "Scale" Keynote Speech, Banff, Alberta		2010
	Greenbuild International Conference + Expo, Phoenix		2009
	ULI Fall Meeting and Urban Land Expo, San Francisco		2009
	Reinvention 2008: Designing for the Future Keynote Speech, Austin		2008
	Towards Carfree Cities, Portland, Oregon		2008
	Pacific Energy Center, San Francisco		2008
	Livable Berkeley		2008
	California College of the Arts, San Francisco		2007
	Black Rock Design Institute, Nevada Museum of Art, Reno		2007
	San Francisco Design Center Winter Market, San Francisco		2006
	DWELL on Design Conference, San Francisco		2006
	Wisconsin AIA Convention, Madison, Wis.		2006
	Structures for Inclusion 6: Expanding Design, San Francisco		2006
	Design Innovations, University of Illinois, Chicago		2005
The Code of Collaboration, Arch Lab, Denver		2005	
Architecture + Conflict, Arch Lab, Denver		2005	
Structures for Inclusion 4: Choosing Relevancy, Atlanta		2004	
University of New Mexico, Albuquerque		2004	
select honors	NPH Visionary and Innovative Leader in Design		2014
	AIA California Council Distinguished Practice		2012
	Lambda Alpha International Honorary Society		2011
	Hearthstone BUILDERS Humanitarian Award		2009
	Housing Hero: San Francisco Housing Action Coalition		2008
	Wm. S. Marvin Builders Hall of Fame for Design Excellence		2008
	Fellow, American Institute of Architects		1996
select juries	AIA Santa Barbara Design Awards, Juror		2009
	AIA Seattle Design Awards, Juror		2008
	AIA Utah Design Awards, Juror		2008
	AIA Austin Design Awards, Juror		2008
	Re:Vision Design Charrette, "Revisionary"		2008
	I. Donald Turner Prize, Juror, Advisory Council		2006-ongoing
	USGBC N. California Emerging Green Builders Competition		2006
	AIA/HUD Secretary's Housing and Community Design Awards		2006
	Bank of America Low Income Housing Challenge		2004
	Residential Architect Design Awards, Washington D.C.		2003
	Oakland Museum, Doghaus: Architecture Unleashed		1999
	AIA San Mateo Design Competition, Juror		1995
	AIA Redwood Empire Design Awards, Juror		1994
	ASID Awards, Juror		1990
	boards	SPUR, Board of Directors	
San Francisco Bicycle Coalition, Board of Directors			2004-2011
SFMOMA Architecture + Design Accessions Committee			1996-2002



Daniel Simons

AIA LEED AP

Principal

Daniel Simons, AIA, LEED AP, is a Principal at David Baker Architects. Daniel holds an M.Arch. from the University of Washington.

He has more than 15 years of experience in design, construction document preparation, and construction administration. Daniel has focused on the field of multi-family housing, including both affordable and market-rate projects, and uses his extensive knowledge of green building practices and progressive city planning to minimize the buildings' environmental impact while improving the quality of life for residents.

danielsimons@
dbarchitect.com

California Registration
Number: C30025



affordable

- Lakeside Senior Housing, Oakland, CA
- Williams Terrace Senior Housing, Charleston, SC
- Station Center Family Housing, Union City, CA
- Tassafaronga Village, Oakland, CA
- Eddy & Taylor Family Housing, San Francisco, CA
- 888 7th Street, San Francisco, CA
- Folsom + Dore Supportive Apartments, San Francisco, CA
- Delmas Park, San Jose, CA
- Mabuhay Court Senior Housing, San Jose, CA
- Linden Court, Oakland, CA

market-rate

- 300 Ivy Street, San Francisco, CA
- 888 7th Street, San Francisco, CA
- West End Lofts, Oakland, CA
- Magnolia Row, Oakland, CA

select lectures

- Make The Connection, San Francisco 2012
- Pacific Coasts Builders Conference, San Francisco 2012
- City of Oakland Environmental Lecture Series, Oakland 2011
- USGBC Federal summit, Washington D.C. 2010
- National Assoc. of Local Government Environmental Professionals (web) 2010
- AIA 2009 Convention, San Francisco 2009
- Greenbuild 2009, Phoenix 2009
- Society of Environmental Journalists Conference, San Francisco 2007
- AIASF Energy + Sustainability Design Awards, San Francisco 2006
- This Way to Sustainability Conference, Chico 2006
- San Francisco AIA Living Home Tour, San Francisco 2005
- Show You're Green, National AIA Housing Roundtable, San Francisco 2005
- ULI SF New Market Rate Housing in West Oakland, Oakland 2005

select juries

- AIASF Energy + Sustainability Awards 2012
- University of California, Berkeley 2004

articles

- "Green Affordable Housing", *Eco Structure Magazine* 2012

education

- Masters of Architecture 1998
- University of Washington, Seattle
- Bachelor of Psychology 1991
- University of California, San Diego

affiliations

- LEED AP Certified 2004
- USGBC



Amanda Loper
 AIA, LEED AP
Principal

Amanda Loper AIA LEED AP joined DBA in 2006 and became a Principal of the firm in 2014. She holds degrees in architecture and interior architecture from Auburn University and is an alumna of the Rural Studio. Amanda specializes in rapid architectural prototyping and works to bring social awareness to issues of housing and density within the urban setting.

amandaloper@
 dbarchitect.com

California Registration
 Number: 33383



affordable	Station Center Family Housing, Union City Drs. Julian and Raye Richardson Apartments, San Francisco Tassafaronga Village, Oakland 888 Seventh Street, San Francisco Ironhorse at Central Station, Oakland Blossom Hill Affordable Housing San Jose Paseo Senter at Coyote Creek, San Jose Hunters View Block 10, San Francisco	
market-rate	Saint Frank Coffee, San Francisco Rincon Green, San Francisco Pacific Cannery Lofts, Oakland EQR Potrero, San Francisco EQR 801 Brannan, San Francisco 344 Fulton, San Francisco Parker Place, Berkeley	
publications	"Focus on the First 20 Feet: How to Meet the Street" <i>The SPUR Urbanist</i> , June 2014 Urban Field Notes: "This is Where I Walk, Rest, Eat, Perform, Live, Shop, Work, Nap, Read, Chat..." <i>The SPUR Urbanist</i> , June 2014	
presentations	"Densifying Design" SPUR Lunchtime Forum "Housing Our City" Pecha Kucha #55 (AIASF/SFHAC/SPUR)	2014 2014
education	Bachelor of Architecture Auburn University, Alabama Bachelor of Interior Architecture Auburn University, Alabama	2005 2005
honors + prizes	International Urban Competition: Miami Civic Center, First Place Re:Vision Dallas: XERO Project, First Place UN Film Festival: Stories from the Field Logo Competition, Finalist Auburn University Thesis Prize	2010 2009 2008 2005
offices + committees	School of Architecture at Auburn Advisory Council	2010 - present



2015

Lakeside Senior Housing, Oakland (www.dbarchitect.com/LakesideSeniorHousing)

2014

300 Ivy, San Francisco (www.dbarchitect.com/300Ivy)

2013

Bayview Hill Gardens, San Francisco (www.dbarchitect.com/BayviewHillGardens)

2012

Fillmore Park, San Francisco (www.dbarchitect.com/FillmorePark)

La Valentina Station, Sacramento (www.dbarchitect.com/LaValentina)

Station Center Family Housing, Union City (www.dbarchitect.com/StationCenter)

2011

Richardson Apartments, San Francisco (www.dbarchitect.com/RichardsonApartments)

2010

h2hotel, Healdsburg (www.dbarchitect.com/H2Hotel)

Tassafaronga Village, Oakland (www.dbarchitect.com/Tassafaronga)

Armstrong Senior Housing, San Francisco (www.dbarchitect.com/ArmstrongSeniorHousing)

Armstrong Place Family Townhouses (www.dbarchitect.com/ArmstrongPlace)

Ironhorse at Central Station (www.dbarchitect.com/IronhorseCentralStation)

2009

888 Seventh Street, San Francisco (www.dbarchitect.com/888Seventh)

Pacific Cannery Lofts, Emeryville (www.dbarchitect.com/PacificCanneryLofts)

2008

Paseo Senter at Coyote Creek, San Jose (www.dbarchitect.com/PaseoSenter)

Crescent Cove, San Francisco (www.dbarchitect.com/CrescentCove)

2007

Art Ark Artist Housing, San Jose (www.dbarchitect.com/ArtArk)

TAXI, Denver (www.dbarchitect.com/Taxi)

Delmas Park, San Jose (www.dbarchitect.com/DelmasPark)

Blue Star Corner, Emeryville (www.dbarchitect.com/BlueStarCorner)

200 Second Street, Oakland (www.dbarchitect.com/200SecondStreet)

2005

West End Commons, Emeryville (www.dbarchitect.com/WestEndCommons)

Curran House, San Francisco (www.dbarchitect.com/CurranHouse)

Folsom + Dore Supportive Apartments, San Francisco (www.dbarchitect.com/FolsomDore)

2004

310 Waverly Residence, Palo Alto (www.dbarchitect.com/310Waverly)

2003

8th + Howard/SOMA Studios, San Francisco (www.dbarchitect.com/8thHoward)

Linden Court, Oakland (www.dbarchitect.com/LindenCourt)

Magnolia Row, West Oakland (www.dbarchitect.com/MagnoliaRow)

2002

Lenzen Square, San Jose (www.dbarchitect.com/LenzenSquare)

Northside Community Center, San Jose (www.dbarchitect.com/Northside)

Ironhorse Lofts, Walnut Creek (www.dbarchitect.com/IronhorseLofts)



**2001**

Hotel Healdsburg, Healdsburg (www.dbarchitect.com/HotelHealdsburg)
 UCMBEST, Santa Cruz (www.dbarchitect.com/UCMBEST)
 Stoney Pine, Sunnyvale (www.dbarchitect.com/StoneyPine)
 Moonridge Village, Half Moon Bay (www.dbarchitect.com/MoonridgeVillage)

2000

SOMA Residences, San Francisco (www.dbarchitect.com/SOMAResidences)
 Pensione Esperanza, San Jose (www.dbarchitect.com/PensioneEsperanza)
 Coggins Square, Walnut Creek (www.dbarchitect.com/CogginsSquare)
 Oroysom Village, Fremont (www.dbarchitect.com/OroysomVillage)
 SHIFT Residence, San Francisco (www.dbarchitect.com/Shift)

1999

Mabuhay Court, San Jose (www.dbarchitect.com/MabuhayCourt)
 Indiana Industrial Lofts, San Francisco (www.dbarchitect.com/IndianaIndustrialLofts)
 Emeryville Warehouse Lofts, Emeryville (www.dbarchitect.com/EmeryvilleWarehouseLofts)
 Marquee Lofts, San Francisco (www.dbarchitect.com/MarqueeLofts)

1998

Bell Mews, San Francisco (www.dbarchitect.com/BellMews)
 Frogdesign Studio, San Francisco (www.dbarchitect.com/FrogdesignStudio)

1996

Pensione K, Sacramento (www.dbarchitect.com/PensioneK)
 Columbia Park, San Francisco (www.dbarchitect.com/ColumbiaPark)

1995

18th + Arkansas/G2 Lofts, San Francisco (www.dbarchitect.com/18+ArkansasG2)
 Manville Hall, Berkeley (www.dbarchitect.com/ManvilleHall)
 Plaza Maria, San Jose (www.dbarchitect.com/PlazaMaria)

1994

Kayo House, Berkeley (www.dbarchitect.com/KayoHouse)

1993

Sunrise Village, Fremont (www.dbarchitect.com/SunriseVillage)

1992

Clocktower Lofts, San Francisco (www.dbarchitect.com/ClocktowerLofts)
 355 Bryant Lofts, San Francisco (www.dbarchitect.com/355BryantLofts)
 San Francisco Bar Pilots Headquarters, San Francisco (www.dbarchitect.com/SFBarPilots)

1990

601 Fourth Street Lofts, San Francisco (www.dbarchitect.com/6014thStreetLofts)
 Parkview Commons, San Francisco (www.dbarchitect.com/ParkviewCommons)
 Candlestick View, San Francisco (www.dbarchitect.com/CandlestickView)

1989

Bison Building + Brew Pub, Berkeley (www.dbarchitect.com/BisonBrewpub)

1988

Meadow Court, San Mateo (www.dbarchitect.com/MeadowCourt)

1986

Cafe Milano, Berkeley (www.dbarchitect.com/CafeMilano)
 Fred Cody Building + Cody's Cafe, Berkeley (www.dbarchitect.com/CodysCafe)

1985

Holloway Terrace, San Francisco (www.dbarchitect.com/HollowayTerrace)
 UC Berkeley Dining Halls, Berkeley (www.dbarchitect.com/UCBerkeleyDiningHalls)





PROJECT

ART ARK www.dbarchitect.com/ArtArk

Innovative affordable housing made with artists in mind, the Art Ark is divided into two distinct “neighborhoods” that are joined by a performance plaza and art gallery. The Factory building, which faces a row of industrial fabricators and services, features small artist live-work lofts opening onto landscaped courts with spaces to create or display sculptural pieces. The Cottages—nested studios in the style of bungalows—have private porches and stoops and offer a cozier, more domestic aspect.

CLIENT: CORE Development

ADDRESS	UNIT COUNT	DENSITY RATIOS	
1035-55 SOUTH 6TH STREET	STUDIO	133	PROJECT SF 171,779
SAN JOSE, CALIFORNIA	2 BEDROOM	15	ACRES 2.2
	TOTAL	148	UNITS/ACRE 67
STATUS		PARKING	
COMPLETED 2007		TOTAL	173
		SPACES/UNIT	1.17
		TYPE	SURFACE



PROJECT **BAYVIEW HILL GARDENS** www.dbarchitect.com/BayviewHillGardens

Previously the site of a derelict motel, this transit-oriented building provides 73 green, supportive homes for formerly homeless families and youth aging out of foster care. The affordable rental project features many custom design elements and an Afrocentric theme honors the history of the neighborhood and heritage of the community with African-inspired details throughout. The generous units overlook an “edible landscape”—an 8,500-square-foot urban garden with fruit trees, vines, and raised planting beds that allow residents to grow their own food.

CLIENTS: Providence Foundation, Mercy Charities Housing

ADDRESS	UNIT COUNT	DENSITY RATIOS
1075 LE CONTE AVENUE	STUDIO 32	PROJECT SF 80,436
SAN FRANCISCO, CALIFORNIA	2 BEDROOM 33	ACRES 0.6
	3 BEDROOM 8	UNITS/ACRE 121
TOTAL 73		
STATUS		PARKING
COMPLETED NOVEMBER 2013		TOTAL 21
		SPACES/UNIT .28
		TYPE GARAGE





GREEN, PARKING LITE, AFFORDABLE HOUSING

PROJECT

RICHARDSON APARTMENTS www.dbarchitect.com/RichardsonApartments

In the heart of San Francisco, the Drs. Julian and Raye Richardson Apartments provides 120 permanent, supportive studio units for very-low-income formerly homeless residents, many with mental and physical disabilities. The five-story infill development remediates the site of a collapsed freeway with green homes, street improvements and neighborhood-serving retail, including a social-enterprise corner bakery that provides jobs and training to local residents. Topped with a living roof, photo voltaics, domestic solar hot water, and community agriculture, the sustainable project rated 139 GreenPoints. CLIENTS: Community Housing Partnership, Mercy Housing California

ADDRESS	UNIT COUNT	DENSITY RATIOS	
365 FULTON STREET SAN FRANCISCO, CALIFORNIA	STUDIO	120	65.419
	TOTAL	120	20.326
STATUS COMPLETED SEPTEMBER 2011		RETAIL SF	2,700
		ACRES	0.47
		UNITS/ACRE	276
SELECT AWARDS		PARKING	
2012 AIA CALIFORNIA COUNCIL EXCEPTIONAL RESIDENTIAL MERIT AWARD		TOTAL	0
2012 AIA EAST BAY EXCEPTIONAL RESIDENTIAL HONOR AWARD			
2012 AIA/HUD SECRETARY'S AWARD			
2012 AIA NATIONAL HOUSING AWARD			
2012 RESIDENTIAL ARCHITECT DESIGN MERIT AWARD: AFFORDABLE			
2012 WESTERN WOOD DESIGN AWARD: MULTI-STORY MIDRISE			



PROJECT **STATION CENTER** www.dbarchitect.com/StationCenter

Enabled by the Proposition 1C TOD bond program, Station Center is the affordable inclusionary component of the Union City Master Plan, which calls for the BART Station to be revamped into an intermodal station. On a remediated brownfield site sandwiched between the existing commuter and freight lines, this LEED for Homes Platinum building brings 157 affordable units and a neighborhood-serving garage that fronts the adjacent rail, acting as a sound buffer. A double-height retail arcade anchored by a corner café enlivens the street edge. The stair tower features a community-sourced mural by artist Mona Caron. CLIENT: MidPen Housing

ADDRESS	UNIT COUNT	DENSITY RATIOS
34800 11TH STREET	1 BEDROOM 33	PROJECT SF 299,944
UNION CITY, CALIFORNIA	2 BEDROOM 74	SITE SF 2.16
	3 BEDROOM 50	RETAIL SF 72.6
STATUS COMPLETED OCTOBER 2012	TOTAL 157	ACRES 2.16
		UNITS/ACRE 72.6
SELECT AWARDS		PARKING
2014 CNU 2014 CHARTER AWARDS: GRAND PRIZE BEST PROJECT		TOTAL 289
2014 CNU 2014 CHARTER AWARDS: BEST BUILDING		SPACES/UNIT 1.3
2013 ULI GLOBAL AWARD FOR EXCELLENCE		TYPE GARAGE
		BICYCLE 53



PROJECT

TASSAFARONGA VILLAGE www.dbarchitect.com/Tassafaronga

This 7.5-acre Oakland neighborhood achieved California's first LEED-ND Gold Certified Plan.

The complex development replaces decaying public housing and repairs the deteriorated street grid. It features a diverse range of housing: an abandoned pasta factory repurposed as supportive apartments and clinic; a three-story apartment building topped with a green roof and podium courtyard; and 77 family townhomes. Additionally, 22 Habitat for Humanity townhomes are integrated into the site. Surrounded by pathways, pocket parks, and open space, the OHA residences are LEED for Homes Platinum Certified. CLIENT: Oakland Housing Authority

ADDRESS	UNIT COUNT	DENSITY RATIOS
OAKLAND, CALIFORNIA	OHA STUDIO	7
	OHA TOWNHOUSE	77
	OHA 1 BEDROOM	16
	OHA 2 BEDROOM	34
	OHA 3 BEDROOM	23
TOTAL	157	
STATUS COMPLETED JUNE 2010		
AWARDS		PARKING
2012 NATHANIEL A. OWINGS AWARD ENTRY OF NOTE		OHA TOTAL
2011 ULI AWARD FOR EXCELLENCE: FINALIST		HABITAT TOTAL
2011 NATIONAL AIA HOUSING AWARD		SPACES/UNIT
2010 GOLD NUGGET MERIT AWARDS: BEST INFILL SITE PLAN; BEST GREEN SUSTAINABLE COMMUNITY OF THE YEAR		TYPE
		200
		30
		1.2
		GARAGE+SURFACE



PROJECT **LA VALENTINA STATION** www.dbarchitect.com/LaValentinaStation

For more than two decades, a high-crime light-rail stop at a toxic empty lot; now, a sustainable affordable housing development and new gateway to downtown. This new affordable rental building remediates a toxic site, bolsters important local electrical and storm-water infrastructure, and brings compact transit-oriented homes to a neglected area. The building provides new neighborhood-serving spaces and puts eyes on the street with private balconies, an outdoor lobby and stair tower, and bridge ways that create views at all levels and on all sides of the site. The street level facing the light-rail station is activated by new commercial space and a café. CLIENT: Domus Development

ADDRESS	UNIT COUNT	DENSITY RATIOS
12TH STREET	STUDIO 12	PROJECT SF 67,356
BETWEEN D + E STREETS	1 BEDROOM 24	ACRES 0.83
SACRAMENTO, CALIFORNIA	2 BEDROOM 21	UNITS/ACRE 76
STATUS	3 BEDROOM 6	
COMPLETED JUNE 2012	TOTAL 63	
SELECT AWARDS	PARKING	
2013 EPA SMART GROWTH ACHIEVEMENT AWARD	TOTAL	63
2013 GOLD NUGGET HONOR AWARD: BEST SUSTAINABLE COMMUNITY	SPACES/UNIT	1
2013 SACOG SALUTES! BLUEPRINT EXCELLENCE AWARD	TYPE	GARAGE
SACRAMENTO BUSINESS JOURNAL BEST INFILL PROJECT OF 2011-12		





Typical green features of DBA projects include:

- solar power + water
- natural ventilation
- daylighting
- recycled materials
- community gardens + “decompression” courtyards
- green roofs
- bioswales + storm-water management
- car-share pods, “parking lite”, unbundled parking, bicycle parking

David Baker Architects has a core philosophy and practice of energy conservation and environmental sustainability, beginning with award-winning solar designs in 1979. The firm has participated successfully in several LEED Pilot Programs and has won numerous awards and distinctions for sustainable developments. Here is a sampling of our certified projects.

ZERO COTTAGE, SAN FRANCISCO (2012)

Net-Zero, LEED for Homes Platinum, GreenPoint Rated, Passive House
This cottage and workshop addition to a residential and commercial compound is the first Net Zero and Passive House Certified residence in San Francisco.

STATION CENTER FAMILY HOUSING, UNION CITY (2012)

LEED for Homes Mid-Rise Platinum
Transit-oriented affordable family housing as a cornerstone of the new Union City Master Plan and BART intermodal station.

RICHARDSON APARTMENTS, SAN FRANCISCO (2011)

Build It Green, GreenPoint Rated, Green Communities
Supportive housing for formerly homeless within the Market-Octavia Neighborhood Plan.

ARMSTRONG SENIOR HOUSING, SAN FRANCISCO (2010)

LEED-NC Gold
This transit-oriented affordable senior housing has photovoltaic arrays, vegetated bioswales and a rain garden that manages storm-water runoff.

TASSAFARONGA VILLAGE, OAKLAND (2010)

LEED-ND Gold Plan, LEED for Homes Platinum (15 buildings)
All of the buildings in this affordable neighborhood, including a reclaimed pasta factory, are designed to a green standard for both the construction and continuing life of the structures.

IRONHORSE AT CENTRAL STATION, OAKLAND (2010)

Build It Green
Ironhorse earned more than three times the required points for GreenPoint rating and won the Judges GreenPoint Showcase Honor Award for Multi-Family Housing from Build It Green and a 2010 Gold Nugget Merit Award for Best Green Point Rated Community.

H2HOTEL, HEALDSBURG (2010)

LEED-NC Gold
This refined rustic retreat, on the remediated site of a gas station, is infused in all aspects of its design, operations, and attitude with eco-consciousness.

PACIFIC CANNERY LOFTS, WEST OAKLAND (2008)

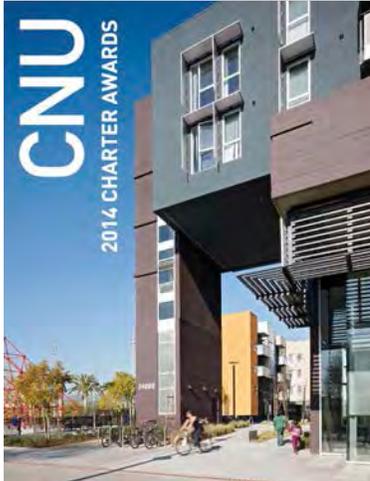
GreenPoint Rated
A sustainable repurposing of a historic cannery as a diverse collection of studios, flats, and loft townhouses, PCL won a 2010 Gold Nugget Award for Best Adaptive Re-Use.

BLUE STAR CORNER, EMERYVILLE (2007)

LEED for Homes
This townhouse development was the first attached multi-family development to achieve LEED for Homes certification in California.

FOLSOM + DORE APARTMENTS, SAN FRANCISCO (2005)

LEED-NC Silver
This affordable supportive housing achieved the first LEED-NC Silver certification in Northern California and was awarded the Home Depot Foundation's 2007 Affordable Housing Built Responsibly honor and a \$75,000 StopWaste.org grant.



CNU
2014 CHARTER AWARDS

2014

Congress for the New Urbanism Charter Award—Grand Prize: Station Center

Congress for the New Urbanism Charter Award—Best Building: Station Center

NPH Visionary and Innovative Leader in Design: David Baker FAIA

San Francisco Business Times Affordable Residential Real Estate Deal of the Year: Bayview Hill Gardens

EPA Smart Growth Achievement Award: La Valentina Station

2013

Urban Land Institute Global Award for Excellence: Station Center

AIA SF Constructed Realities Honor Award—Small Projects: Zero Cottage

PCBC Gold Nugget Honor Award—est Sustainable Community: La Valentina Station

2012

AIA California Council 2012 Distinguished Practice: David Baker FAIA

Urban Land Institute Global Award for Excellence: Armstrong Place Senior + Family Housing

Sacramento Business Journal Best Infill Project of 2011-12: La Valentina Station

American Institute of Architects Housing Award—Multifamily Living: Richardson Apartments

AIA/HUD Secretary's Award—Excellence in Affordable Housing Design: Richardson Apartments

Real Estate Deals of the Year—Best Affordable Residential: Richardson Apartments
San Francisco Business Times

2011

Builder's Choice Grand Award—Best Green/Sustainable Community: Tassafaronga Village

AIA Design for Aging Review Award: Armstrong Senior Housing

AIA Design for Aging Review Award: Mabuhay Court

Multi-Family Executive Affordable Project of the Year: Armstrong Place

Association of Bay Area Governments Growing Smarter Together Award: Tassafaronga Village

American Institute of Architects National Housing Award: Tassafaronga Village

American Institute of Architects National Housing Award: Armstrong Place Senior + Family Housing

2010

San Francisco Business Times Green Business Awards— Best Green Architect

AIA/HUD Secretary's Award—Excellence in Affordable Housing Design: Paseo Senter



COMMUNITY ENGAGEMENT



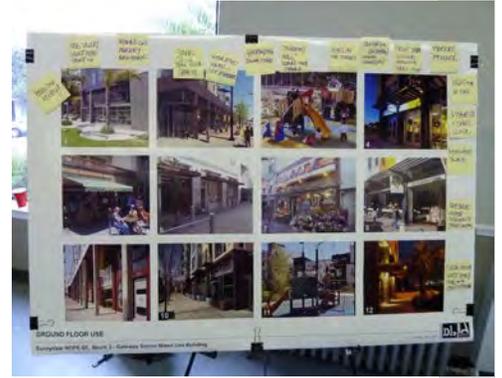
David Baker Architects uses social design strategies to enhance the individuality, community, and urbanity of our projects. Our primary tactic is thinking not outside the box, but outside the building. We believe that a building's presence does not end at the wall, the easement, or even the property line, but is part of the holistic fabric of the block, neighborhood or city. We believe that residents and building users are our ultimate clients. Our grappling with issues of place, community, and context give our work social depth and cultural resonance.

We incorporate feedback from project and community stakeholders through a variety of mechanisms, including community meetings and presentations, open houses, and post-occupancy evaluations. We communicate with community leaders to assess the needs and desires and meet formally with community groups throughout the planning process as well as engaging in informal meetings with neighborhood associations, future residents, and interested parties. We research the history of the neighborhood and site and incorporate stakeholder feedback to produce a well-organized, thoughtful response to site, program and budget.

With a strong understanding of the community and political processes involved in developing affordable housing projects, DBA's approach draws from close collaboration with the client and relies on community involvement to help shape the design and final building. We are prepared to present and have open conversations about our work and design approach in ways that include multiple languages and cultures and to determine the best format to reach diverse groups.

The next few pages outline some of the outreach and engagement we have undertaken to create the most fitting and successful design for previous developments.

COMMUNITY INPUT



During the research and early design process on Sunnydale HOPE SF Senior Housing, the design team coordinated with the other architecture firms working within the Master Plan as well as developer Mercy Housing California to invite all interested people from the existing housing and community-at-large to two multilingual public meetings to share the plans for the sites and solicit feedback.

The DBA team presented and discussed the model of the proposed development along with a rough design concept and precedent boards and spent the day with people in both large and small break-out groups to glean the community's needs, hopes, and concerns about the development. Participants contributed notes on their likes, dislikes, and what they want to see in the new housing and the larger neighborhood. Later, all participants and stakeholders were invited back to respond to refined design directions. Translators were on hand to ease communication.

Architect Kevin Wilcock leads the group through Armstrong Senior Housing, below.

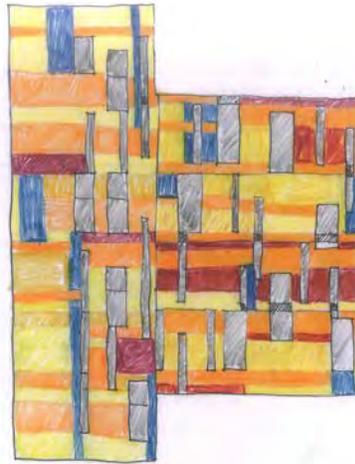


For the research and outreach for both Bayview Hill Gardens and 5800 Third Street Senior Housing, the design and development team arranged tours—site visits of local buildings of the same typology and programming. Residents of the existing housing, potential residents, and interested community members boarded a chartered bus and joined the architects for tours of several relevant properties.

Each participant was provided with a disposable camera and asked to take pictures of things that they liked about the buildings or that inspired them to comment. Once the film was developed, participants were asked back to share their reactions to the buildings they visited and engage in discussion with the design team.

Additionally, questionnaires were provided in five languages and subsequently translated to get extensive feedback and ensure that every voice was heard.

LOCAL AND CULTURAL RESEARCH



Ghanian mudcloth and other African textiles inspired the “quilt wall,” which wraps the building face in a quilt of color and pattern.

To develop Armstrong Place Senior Housing, David Baker Architects met extensively with the Bayview Hunters Point Project Area Committee. These meetings included public hearings to invite the opinions of interested parties in the neighborhood as well as more private meetings with PAC and community representatives to move the design forward.

With support of the Bayview PAC and with a goal of serving the Third Street neighborhood and representing the traditionally African-American population of the area, the design team undertook both historical and cultural research and extensive conversations with the community. These efforts resulted in the incorporation of numerous African-derived design elements that create a defined identity and sense of place for the project.

Research into Adinkra tribal symbols of West Africa resulted in large graphic icons representing positive concepts to be cast in concrete to line Armstrong Senior’s courtyard. Here, *Ananse Ntontan*—the spider’s web—represents wisdom, creativity, and the complexities of life.



MEET THE NEIGHBORS



For the design and entitlement process for the EQR Potrero project—a 530,000sf mixed-use multi-family urban infill development, DBA and the developer engaged in numerous meetings with various community groups, including the local Boosters Club, and adjacent property owners, such as the California College of Arts, whose local campus would be affected by the development.

Additionally, DBA held an on-site open house, inviting all interested parties to meet over coffee and donuts, learn about the proposed design, share their concerns, and engage in conversation with each other and the design and development team. These discussions generated valuable feedback that helped guide the design.

DBA's EQR Potrero design in San Francisco benefitted from feedback from community groups.

This process resulted in the development obtaining full endorsements from all involved groups, and led to successful entitlements of the project.



MEET THE RESIDENTS

DBA takes the opportunity when possible to follow-up with clients, residents, and building staff to better understand what works and to incorporate the suggestions of the actual users. From this we have learned many things—sometimes small and simple—that enhance the experience of the residents, such as the importance of individual doorbells to give families and seniors a sense of ownership and privacy, and “memory shelves” in senior buildings, which serve as a place to rest a bag or keys, provide an opportunity for expression, and help with unit identification so seniors don’t need to rely on reading or remembering their unit number.

Folsom + Dore Supportive Apartments resident Flora Ollison, below, says, “Moving in here was like moving from hell into heaven, yes it was!”



Memory shelves provide a helpful place to personalize your space.



Post-occupancy visits allow us to get to know the residents and see the building in action.



Fidel Cazares, who lives with his family at Curran House in the Tenderloin, appreciates the roof garden: “I plant the things I planted before I came here,” he says. “It helps me stay connected to home.”

MULTIPLY THE GOOD

“My name is Khawlah and I am 15 years old. My family and I live in Tassafaronga Village. One day I would be honored to do for others what you have done for me. I want to be able to design houses for the less fortunate.”



DBA designer Yes Duffy working with Khawlah on a model for her school's library as part of her internship.

In the article “Design as Balm for a Community's Soul” New York Times architecture critic Michael Kimmelman refers to DBA's Tassafaronga Village when he talks about “the multiplier effect of good design.” The new affordable-Oakland Housing Authority neighborhood replaced decrepit public housing and a crime-ridden lot. The design of the new neighborhood inspired resident and high-school sophomore Khawlah al-Olefi to pursue an architectural internship with our firm. Oakland native Kelly Carlisle—who grew up forbidden to play in the park adjacent to Tassafaronga Village because it was too dangerous—returned to town after the new housing was complete and launched Acta Non Verba Urban Youth Farm. The farm—built and tended mainly by kids from Tassafaronga Village—hosts a regular farmer's market for the neighborhood. Proceeds go into bank accounts for the kids' education.



Left, Executive Director Kelly Carlisle shows off Acta Non Verba's new pizza oven. Right, Tassafaronga kids celebrate the farm's first squash harvest.

CULTIVATE COMMUNITIES



Our entry mural says “welcome” in all the languages spoken by the clients at the senior center.

In 2009, DBA facilitated a Summit on Aging on behalf of the Bayview Hunters Point Multipurpose Senior Services Center. Firm principals hosted the event and provided a brief overview of local development in the emerging district and a framework for the discussion about housing the neighborhoods’ aging population.

DBA shared senior housing prototypes (our projects and those of other firms), and opened the floor to get feedback from seniors, concerned families and care-givers about what they’d like to see in upcoming senior housing.

DBA’s relationship with the senior center continued with a staff volunteer day doing repairs and upgrades to the outmoded senior center as we were making plans for the new facility.

Dr. George W. Davis Senior Center and Housing is currently in design in our office. The building and its expanded and enhanced neighborhood-serving senior community center round out a quartet of buildings creating a diverse urban community along San Francisco’s rapidly developing Third Street Corridor. Integrating senior housing into a mixed-use micro-neighborhood adds a multi-generational aspect and prevents seniors from living in isolation.

A similar concept, Armstrong Place Senior and Family Housing, which places senior apartments and family townhouses on the same site, was recently selected for a Global Award for Excellence by the Urban Land Institute.



Artist Mona Caron (at right in center photo) worked with residents and neighbors of Station Center Family Housing to choose a direction for the street edge of the mural.

As construction completed on Station Center Family Housing in Union City, California, in late 2012, the design and development team put out a call for a beacon art piece to reflect the history of the place and the new community being formed by the housing.

At a community meeting on site, resident kids suggested the idea of welcoming words in every language spoken at Station Center. Per Elias, 9, "Everyone here has roots in different parts of the world, and together we grow and blossom as a community."

In order to create dynamic engagement at the site, artist Mona Caron invited people to stop by and contribute their multilingual words of welcome in person: Some write them on a piece of paper, others add them directly to the wall. So far, mothers, teenagers, men at work, and seniors have come to contribute a welcoming phrase in their native language.

In addition to the "international roots" at the base of the towering, thriving plant, there are also two shapes that feed into the community flower. One shows what came before on the land, and the other shows what there could be, with images inspired by a "future fantasy" brainstorm session at the same packed community meeting.

CONSTRUCTION MANAGEMENT

KKG, Inc.

Construction Management: KKG, Inc.

Company Profile



KKG Inc. is a Construction Management firm that has provided pre-construction, scheduling, estimating, purchasing, constructability, project management, and owner's representation since 2001. We are located in Upland, California. Our location allows us to effectively cover not only Los Angeles County, but San Bernardino, Riverside and Orange Counties.

KKG Inc. came into existence at the request of many former clients of Brian Kent after he concluded a 24 year career working in the executive management of larger, national construction companies. As a consequence of this client demand, we have been blessed with the problem of growing the organization to keep up with client demand rather than having to spend our energies towards drumming up business so we could grow. With that said, we are always trying to increase our customer base and grow the organization in a careful fashion to meet the needs of new as well as existing clients.

KKG is **licensed with both A and B** licenses in California, meaning: We know how to build. We are fully qualified to do engineering projects as well as structures. As compared to many firms currently in the Construction Management arena, we stick to construction management because candidly, we possess a wealth of expertise that we can spread over a broader cross section of the industry by serving in this administrative role as opposed to building the project brick by brick. Construction Management is not an ancillary division meant to generate additional revenue to the bottom line, as it is with many larger CM firms that are in fact subsidiaries to larger general construction firms. We are a powerful support mechanism that beyond basic project administration, can step in when needed for technical issues and to advise on the best way to achieve the goal.

This type of approach is most cost effective for the client. We bring as much expertise as is needed to adequately handle the task at hand. Not too much and not too little. Our employees have been on the contractor side of this fence many times in the past dealing with construction management field personnel that were not up to the task of representing their client. These experiences have taught our employees just how important it is to provide a consistent superior service to our clients.

Our particular strength and market niche tends toward organizations that want full service construction management. Historically, our clients tend to be ones who prefer that form of global oversight and capability in their Construction Manager. Normally, the cost of architectural construction administration is cut by half because of the strong role we play. **We have never failed on a Guaranteed Maximum Price project to offset our entire construction management fee in the savings realized through our buyout oversight and change order claim reductions.** On top of all of this, being a smaller company gives our organization the ability to work as a cohesive team to deliver a complete project. Each member does what they are excellent at doing rather than a case of making a smaller group of people assigned to a single project shoulder elements of work they are ill suited to perform.

Some of the specific services KKG Inc. offers are: Preconstruction development, public agency liaison and expediting, scheduling, public utility liaison, bid management services, contractor prequalification and referrals, value engineering, construction quality surveys, budgeting and hard estimating, constructability analysis, solicitation of proposals from and hiring of design team

Company Snapshot

- » Construction Management, Estimating, Constructability Analysis, and Design Assistance services.
- » To date have administrated over \$600,000,000 in direct construction cost.
- » Have performed preconstruction services for over \$1,200,000,000 in construction value.

members, specification writing, accounting services, weekly job meetings (discuss potential changes in cost, schedule or design and prepare appropriate reports), job walks (to assure quality of the work as well as percentage complete), evaluate and negotiate all requested change orders, review and approve all applications for progress payments and payment breakdowns to assure that the costs are appropriate, monitor milestone schedules, monitor contractors and consultants through all aspects of the base building construction so that the project is delivered on schedule and at the agreed-upon budget.

KKG has had extensive experience in many types of construction:

We have been incredibly successful with managing multi-family, affordable housing in the Los Angeles and surrounding areas. KKG has enjoyed a close relationship with Meta Housing Corporation & Essex Property Trust and has managed many of their affordable, multi-family projects.

KKG has also dealt with a number of Educational and Institutional Client's where our employees have had to work within all aspects of Prevailing Wage laws.

We look forward to the opportunity to join your team and be of service to your organization.

Clients

- » Meta Housing Corporation
- » Essex Property Trust
- » Canada Pension Plan Investment Board
- » Douglas Emmett Co.
- » J h Snyder Co.
- » Ampco Parking
- » Kirkorian Theatres
- » Pacific Design Center
- » The ICON Company
- » AMG & Associates
- » Chino Valley Unified School District
- » Rose Hills Mortuary
- » Harding Architects
- » Turner Co.

- » Swinerton Builders
- » Ampco Parking
- » Foothill Country Day School
- » Ray Wilson Co.
- » Madison Development
- » The Webb School
- » Penstar Group
- » ML Street Properties
- » Department of Homeland Security
- » First Baptist Church of Claremont
- » Harvey Mudd College
- » ampus Acquisitions
- » Carpenter's Union

Key Personnel

- » **Brian P. Kent**, President
- » **Patty Spainhower**, Vice President
- » **Gene Archibek**, Senior Project Manager
- » **Kristen McLane**, Director of Pre-Construction and Entitlements

Brian P. Kent

President

Prior to starting KKG, Brian Kent worked as a Vice President for a number of larger, \$100,000,000 a year general contracting firms including Lyle Parks Jr. Inc., Oltmans, Ray Wilson, and Peck Jones. Brian's construction background represents a wide array of experience and skills. Working as a general contractor, he recognized the need on the part of the owners for a third party management entity that could act as intermediary between the GC and owner as well as serve as a lookout for future problems and opportunities to save money and effectively act on them before they were overlooked. When the opportunity arose in 2001, Brian thought it was time to apply the knowledge and experience gained from more than a billion dollars and many hundreds of projects to the formation of KKG.

This allowed him to position KKG to apply this wealth of knowledge and management skills to a wider array of projects, for multiple clients, rather than limiting the company to only managing what it could build in a hands-on fashion as a general contractor.

Patty Spainhower

Vice President

Patty Spainhower has worked in the construction industry for 23 years in various capacities including purchasing, estimating and project management. Prior to joining the team at KKG, Patty managed the purchasing, estimating and forward planning of approximately 11,000 home sites and the land and infrastructure on approximately 3,000 acres. Additionally, Patty was the project manager for 2 master planned communities with a budget exceeding \$300M. As purchasing manager, Patty was responsible for all cost savings, value engineering, national master contract negotiations, budget tracking, change order review and processing. In addition to the responsibilities she held as purchasing manager, as project manager she was also responsible for plan submission and tracking through recorded tract map, including meeting with city council members and various other city officials in an effort to resolve all conditions of approval prior to recordation.

Patty has been involved with two Home Aid projects, overseeing the contributions and construction of one 4,000 square foot home and one community center for disadvantaged children.

PRIOR EXPERIENCE

- » **Lennar Homes**, Offsite Purchasing Manager
- » **Frontier Homes**, Vice President of Purchasing
- » **Steven Walker Homes**, Director of Purchasing

AFFILIATIONS

- » Southern California Purchasing Association
- » Building Industry Association

AREAS OF EMPHASIS

- » Estimating/Budgeting
- » Change Order Oversight
- » Quantity Survey
- » Design Oversight
- » Value Engineering
- » Public Bid Management
- » Project Management Support

PAST PROJECTS

Project Name	Description	Role
Chinatown Metro Apts	123 Unit mixed use, adaptive reuse.	PM Support, Estimating Mgr
Hollywood & Garfield Mixed Use	120 Unit apartments, 5,400 s.f. retail space.	PM Support, Estimating Mgr
Long Beach & Anaheim Mixed Use	Transit-oriented development with 60,000 s.f. of retail space and 366 units of multi-family housing.	Estimating Manager
Adams & Central Mixed Use	30,000 s.f. of retail space with 80 units of multi-family housing.	Estimating Manager
Nickelodeon Studios	Mixed use project with 150 units of multi-family housing & 10,000 s.f. of retail. Adjacent to Metro Rail services.	Estimating Manager
Belmont Station Apartments	276 Unit apartments over subterranean parking on historic site.	Estimating Manager
200-202 Lucas Ave.	Rehab of two structures totaling 3,000 s.f. on historic site.	Estimating Manager
Citiplace	Mixed use project with 140 units of multi-family housing & 20,000 s.f. of retail space	Estimating Manager
Cielo Apartments	119 Unit multi-family apartments	Estimating Manager
El Dorado Apartments	85 Unit multi-family housing	Estimating Manager
Home Sites	641 acres of grading & infrastructure improvements for 2,100 home sites, 2 parks, street lights, revetment.	Purchasing Manager, Project Manager

Gene Archibek

Senior Project Manager

Gene Archibek has been in the construction industry for more than 20 years. He has distinguished himself by consistently ensuring projects under his direction are completed within the budget and schedule objectives established at contract award. Gene is responsible for the administration of all contractual requirements, including Subcontractor agreements, shop drawing logs, and all other important project documentation. He is responsible for implementing and maintaining an effective communication program between all project stakeholders. In addition, Gene is responsible for coordinating and managing the necessary resources throughout the entire project. He will ensure that both your and KKG's expectations and budgetary guidelines are met or exceeded. Gene manages the project from beginning to end including budget, costs, schedule, risk management, insurance, general work performance and

quality, and progress against the plan.

PRIOR EXPERIENCE

- » **Cobalt Construction**, Construction Manager, 2012 - 2013
- » **Suffolk Construction**, Senior Project Manager/ Project Executive 2006 - 2012
- » **White Residential**, Project Manager, 2005 – 2006
- » **McDougal Bros.**, Project Manager 2002 - 2005

CERTIFICATIONS

- » California Contractors License

AREAS OF EMPHASIS

- » Project Management
- » Preconstruction
- » Change Management
- » Document Control
- » Submittal Monitoring
- » RFI Monitoring
- » Field Management Support
- » Quality Control Monitoring
- » Field Coordination

PAST PROJECTS

Project Name	Description	Role
The Metro at Hollywood	120 Unit senior housing.	Pre-Construction & Entitlements
The Metro at Chinatown	Adaptive Re-use project. 123 Unit senior housing	Pre-Construction & Entitlements
Vermont Family Apartments	36 Unit multi-family housing	Pre-Construction & Entitlements
Long Beach Senior Artist Colony & Annex	Transit-oriented development with 200 units of senior housing.	Pre-Construction & Entitlements
Adams & Central Mixed Use	30,000 s.f. of retail space with 80 units of multi-family housing.	Asst. Project Manager / Pre-Construction & Entitlements
Fresh & Easy Neighborhood Market	30,000 s.f. of retail space.	Asst. Project Manager
Belmont Station Apartments	276 Unit apartments over subterranean parking.	Asst. Project Manager / Entitlements
Emerald Terrace Apartments	85 Unit multi-family housing	Asst. Project Manager
Nickelodeon Studios	Management of seismic repair	Asst. Project Manager
Cielo Apartments	119 Unit multi-family apartments	Asst. Project Manager
The Tower at Convention Center Court	12-story office building with adjacent 7-story parking structure	Project Assistant

Kristen McLane

Director of Pre-Construction and Entitlements

Kristen McLane has been working in the industry both on and offsite since 2001. Her employment has spanned both general contracting and construction management. The jobs she has been involved with have covered everything from public works to high-rise commercial, to residential homes & apartment complexes. Kristen completed her construction management certificate through Cal Poly Pomona in 2012 and is scheduled to take her LEED certification in May.

Kristen has also served in the capacity of Location Coordinator on several films and commercials that have involved many of our Client’s projects. This gives her an insider’s perspective when it comes to creative projects such as theaters and performing arts centers. This is especially seen in Meta Housing Corporation’s Long Beach Senior Artist Colony.

PRIOR EXPERIENCE

- » **EJM Consultants, Inc.** Estimating and Project

Support, 2004 - 2007

- » **Fargo Inc. Estimating and Project Support**, 2002 - 2005
- » **Ray Wilson Co.** Administrative Assistant, 2001

EDUCATION

- » University of California Santa Cruz

CERTIFICATIONS

- » Construction Management – Cal Poly Pomona
- » RSMean CostWorks
- » LEED for Homes Intensive – Provided through GreenEDU / USGBC

AREAS OF EMPHASIS

- » Entitlements: Planning, CEQA, NEPA, EIR, MND, etc.
- » Local, State and Federal Agency Coordination
- » Plan Check / Permit Coordination & Expediting
- » Environmental Coordination
- » Utility Coordination
- » LEED
- » Incentive Program Coordination
- » Quality Control Monitoring
- » Field Coordination

PAST PROJECTS

Project Name	Description	Role
The Metro at Hollywood	120 Unit senior housing.	Pre-Construction & Entitlements
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Vermont Family Apartments	36 Unit multi-family housing	Pre-Construction & Entitlements
Long Beach Senior Artist Colony & Annex	Transit-oriented development with 200 units of senior housing.	Pre-Construction & Entitlements
Adams & Central Mixed Use	30,000 s.f. of retail space with 80 units of multi-family housing.	Asst. Project Manager / Pre-Construction & Entitlements
Fresh & Easy Neighborhood Market	30,000 s.f. of retail space.	Asst. Project Manager
Belmont Station Apartments	276 Unit apartments over subterranean parking.	Asst. Project Manager / Entitlements
Emerald Terrace Apartments	85 Unit multi-family housing	Asst. Project Manager
Nickelodeon Studios	Management of seismic repair	Asst. Project Manager
Cielo Apartments	119 Unit multi-family apartments	Asst. Project Manager
The Tower at Convention Center Court	12-story office building with adjacent 7-story parking structure	Project Assistant

Related Projects

LONG BEACH & ANAHEIM MIXED USE

Long Beach, California

Client: Meta Housing Corporation

1640 S. Sepulveda Blvd., Suite 425
Los Angeles, CA 90025

Role: Pre-construction, construction, management of design team, utility coordination, entitlements, hazmat, FF&E.

Project Summary

- » \$39,000,000 Transit-Oriented Development.
- » Includes 200 apartments, a 3,000 sf art exhibition hall, 1,000 sf performing arts rehearsal space, 4,000 sf theater with seating for 110, and a 2,000 sf fine arts classroom.
- » The exterior skin is composed of concrete, glass, composite panels, and plaster.

- » The structure is composed of concrete, masonry, and wood.
- » KKG was responsible for the administration of all design and program development on this project, as well as for the provision of all costing and value engineering services throughout the process.
- » Modifications and synchronization of traffic signals were made surrounding the project.
- » KKG was involved with the coordination of all public utilities, that included rerouting of existing power, sewer, water, phone & cable TV as part of the development.
- » This project involved the abandonment of 400 feet of dedicated City streets.
- » Coordination of private vehicle gates with traffic signalization.
- » Coordination of construction with surrounding property owners.
- » Hazmat identification and mitigation of pre-existing conditions.
- » LEED Silver Certified Edison Advanced Home Program recipient.



Related Projects

VERMONT AVENUE APARTMENTS

Los Angeles, California

Client: **Meta Housing Corporation**

1640 S. Sepulveda Blvd., Suite 425
Los Angeles, CA 90025

Role: Pre-construction, entitlements, hazmat, construction, management of design team, utility coordination, FF&E.

Project Summary

- » \$11,000,000 Inner-City Beautifcation Development.
- » Includes 49 apartments, a 1,000 sf fine arts classroom, exercise room, meeting room, and recycling room.
- » The exterior skin is composed of concrete, glass, composite panels, and plaster.

- » The structure is composed of concrete, masonry, and wood.
- » KKG was responsible for the administration of all design and program development on this project, as well as for the provision of all costing and value engineering services throughout the process.
- » KKG was involved with the coordination of all public utilities, that included rerouting of existing power, sewer, water, phone & cable TV as part of the development.
- » Coordination of private vehicle gates with traffic signalization.
- » Coordination of construction with surrounding property owners and schools.
- » Hazmat identification and mitigation of pre-existing conditions.
- » LEED Silver Equivalent.
- » Edison Advanced Home Program Recipient.
- » Assisted coordination in neighborhood programs: Gardening & Arts programs.



SUSTAINABILITY CONSULTANT

Davis Energy Group



Qualifications

Davis Energy Group is a nationally recognized energy consultancy that provides cutting-edge and visionary solutions to sustainable and applied technologies, systems, and strategies for the housing and commercial building market.

Davis Energy Group (DEG) was incorporated in 1981 to provide mechanical engineering services that focus on building energy efficiency and renewable resources. Current staff includes 20 full time engineering, consulting, program management, and support personnel, including five P.E.'s, several LEED AP's, two former builders, and several part timers. DEG has served a broad range of clients including architects, developers, builders, public agencies, national laboratories, and utilities. DEG's range of work has included working on large-scale developments, incorporating sustainability and energy efficiency measures; building energy simulation and monitoring; technology development and evaluation; laboratory and field testing; energy standards development and compliance services; and management of energy efficiency deployment programs. For the past 10 years DEG has led or co-led a team under the Department of Energy funded Building America Program, and currently manages the Alliance for Residential Building Innovation team. Currently, DEG is also actively involved in PG&E and Southern California Edison Zero Net Energy programs that will help the state achieve its ZNE goals for 2020 and 2030. DEG was the first LEED for Homes provider in California and Nevada, starting in 2005, has certified 537 projects, and has consulted with builders on other green programs such as GreenPoint Rated, Passive House, NGBS, and Enterprise Communities, and has facilitated the use of the Integrative Design Process with many project teams.

DEG was one of the first California firms to utilize energy analysis software and worked closely with the developers of MicroPas to develop specialized applications. DEG has participated in both structural and specific improvements to Title 24 standards. As a consultant to the California Energy Commission (CEC) and investor-owned utilities

(IOU's), DEG has developed numerous exceptional methods and completed several codes and standards enhancement reports for residential and non-residential measures that are now incorporated into Title 24. In addition, DEG has evaluated over a thousand buildings for energy compliance.

Advanced Building and Community Design Analysis

From 1992 through 1994 DEG acted as the Design Build Contractor for PG&E's Advanced Customer Technology Test for Maximum Energy Efficiency (ACT²). Under this project DEG developed methods for designing cost/performance-optimized packages of energy efficiency measures, researched emerging technologies, implemented designs in demonstration homes and commercial buildings, and participated in the impact evaluation of the demonstration projects. DEG also conducted a two-year market evaluation of ground-coupled heat pumps in California, and conducted a number of technology evaluations for PG&E. In late 2010 DEG completed an evaluation of three technologies for potential application under the Zero Net Energy program: ground-coupled heat pumps, evaporative condensers, and heat pump water heaters. Southern California Edison and PG&E have both selected DEG to provide continuing consulting services under their Zero Net Energy programs. DEG president David Springer has also served on PG&E's ZNE advisory committee.

Beginning in 2008, DEG has been working closely with developer West Village Community Partners (WVCP) production builder Carmel Partners, and Chevron Energy Solutions to design, evaluate, and quantify the cost-effectiveness of energy efficiency packages for each of the key building construction types in the U.C. Davis West Village community project. West Village has the goal of using a systems design that allows multifamily, light commercial, and single family residential energy use to be fully offset by onsite renewable generation after reducing building load to the extent possible through energy efficiency. Currently, DEG is working as a subcontractor to Energy & Environmental Economics (E3) to finalize the energy efficiency measure package for the single family homes. Evaluations are aimed to identify those measures that can compete cost effectively with the various scenarios and pricing for on-site energy generation.

In other building energy efficiency work, DEG provided services to EDAA / AECOM for proposed communities in California, Arizona, and South Carolina to develop “good-better-best” scenarios of energy efficiency and greenhouse gas reductions. Information produced was incorporated into a tool that the developers can use to explore a variety of scenarios for land use, building energy efficiency, water use, transportation, and other environmental impacts.

Historically, DEG has provided general mechanical engineering design services for both commercial and residential buildings, but in recent years the firm has scaled back this work and now primarily provides design support to green builders and Building America clients. DEG’s experience in design consulting is valuable in understanding the processes and needs of building design professionals.

Programmatic Activities

Within the past decade DEG has been competitively selected to provide services under two DOE Building Technologies programs. In 2001 DEG was selected by NREL to lead one of four national Zero Energy Homes program teams and worked with builder Centex Homes to develop the first production zero net energy home in California in 2002. When the ZEH program lost its funding, DEG was paired with Steven Winter Associates to represent the CARB Building America team in the western states, and for eight years DEG managed research activity for CARB. In 2011 DEG formed the Alliance for Residential Building Innovation (ARBI), which was selected to serve as one of the 10 newly appointed Building America teams. Other members of this team include the U.C. Davis Western Cooling Efficiency Center and Lighting Technology Center, the Rocky Mountain Institute, and TRC.

As a Building America team leader DEG works with builders, industry members, and other researchers to encourage cost effective, energy efficient construction in residential buildings. The program requires demonstration of commercial viability for all projects and technologies and targets goals of 30-50% whole house energy savings. Savings are achieved by optimizing the building enclosure and selecting measures including space conditioning and domestic hot water systems, appliances, and lighting that produce cost-effective energy savings. Validation of building performance is accomplished through system commissioning and long-

term building monitoring. DEG is currently conducting research on advanced building enclosures and HVAC technologies, and is developing construction guidelines designed to assist building professionals with decisions on HVAC tune-ups and water heater selection. Because energy retrofits have become a major Building America priority, DEG is directing community retrofit programs in several California locations.

Emerging Technologies and Evaluation

Paving the way for emerging technologies is vital to the success of ZNE programs. DEG’s background in this area includes technology development, laboratory testing and field monitoring to verify performance, identification of needs, and participation in the development of emerging technology data bases. DEG has served as a “matrix” contractor to PG&E since 1994, completing a variety of research and technology evaluation projects, and has provided similar services to SMUD and Sempra.

Recognizing the need for specific technologies to fill gaps, DEG has secured state (CEC-PIER) and federal (DOE-SBIR and NETL) funds to develop and commercialize advanced technologies such as a nighttime ventilation cooling system¹ (NightBreeze, Advanced Energy Products), a two-stage evaporative cooler (OASys, Speakman Corp.), a polymer-based low-cost solar water heater (SunCache, Harpiris Inc.), a hybrid rooftop package unit (Hypak), and a stay-in-place insulated form (Formsulate) for residential slabs. DEG has also conducted evaluations of advanced community scale systems such as district heating and cooling and centralized ground-coupled systems.

DEG has also contributed to the evaluation and ranking of emerging technologies developed by others. Field monitoring and technology evaluations have been completed on ground coupled heat pumps (PG&E GeoExchange project), advanced evaporative coolers (SMUD and PG&E), evaporative condensers (SCE, Building America), high performance water heaters (GTI/CEC), and other technologies. Recently DEG completed assessments for PG&E of three technologies to determine their appropriateness in Zero Net Energy designs, including evaporative condensers, heat pump water heaters, and ground coupled heat pumps.

DEG staff has also participated in the development of two ACEEE emerging technology summaries, made presentations at California Emerging Technologies

Coordinating Committee meetings, and participated in the Bonneville Power Administration "E3T" HVAC Technical Advisory Group.

Standards Development and Energy Compliance Experience

DEG has participated in both structural and specific improvements to Title 24 standards. As a consultant to the California Energy Commission (CEC) and investor-owned utilities (IOU's), DEG has completed numerous codes and standards enhancement reports for Title 20 and 24 residential and non-residential measures that are now incorporated into California's building standards. For example, the current method for determining residential water heating energy use is the result of a 1990 DEG study commissioned by the CEC. In addition, DEG has evaluated over a thousand buildings for energy compliance and has HERS raters on staff.

Modeling Software Literacy

DEG has worked with software developers to improve modeling capability, and is currently managing a contract with NREL under the California Solar Initiative (CSI) program grant to make improvements to BEopt3 software that will allow it to be used for retrofit and new home projects in California. Improvements include the incorporation of California IOU tariff structures and energy efficiency measure costs, and the capability to evaluate energy storage as well as renewable systems. DEG was a pioneer in the use of building simulation software, being one of the first users of Calpas, a collaborator with Enercomp in developing specialized Micropas versions, and using DOE-2 in the 1980's. Currently used tools and their applications are listed below.

EnergyPro: DEG uses both the residential and non-residential versions of EnergyPro to develop energy compliance documents for LEED projects, new construction, and retrofit projects in our Whole Neighborhood Approach pilot programs. DEG is well versed in EnergyPro modules for Title 24 new construction, retrofit performance, and CalCerts.

¹The development of NightBreeze stemmed from a project initiated by CIEE titled "Alternatives to Compressor Cooling"

²H. Sachs, S. Nadel et al. "Emerging Energy-Saving Technologies for the Building Sector". ACEEE. 1998 & 2004.

³BEopt (for Building Energy Optimization) utilizes DOE-2, TRNSYS, and other engines and provides automated parametric evaluations to identify the most cost effective combinations of energy efficiency measures.

Key Personnel

Judi G. Schweitzer, MRED, AMDP, CGBP, President / Chief Sustainability Advisor

PROFESSIONAL EXPERIENCE

Technical Advisory Committee Member

California Building & Standards Commission, Sacramento, California, 2008 – Present

Serve as 1 of 9 appointed members in California's Green Building Code Advisory Committee; committee established by statute, and serves as technical advisor to California Building Standards Commission; involves reviewing all proposed green building measures from multitude of state agencies including related public comments and testimony. Provide public testimony, debate, and consensus building as needed.

Achievements:

- » Appointed by Governor Arnold Schwarzenegger and Governor Brown to inaugural state Green Building Code Advisory Committee; reappointed for 3-year term in 2008.

President & Chief Sustainability Advisor, 2006 – Present

Director of Consulting Services, 2000 – 2002

Schweitzer & Associates, Inc. (S&A), Lake Forest, California, 2000 – 2002 & 2006 – Present

Oversee, lead, and actively participate in all aspects of real estate development firm providing advice and inspiration for developers, builders, pension funds, and businesses to optimize value-added integration of green and sustainable development into their portfolios, properties, and projects. Formulate and lead execution of practical, strategic, and innovative solutions via multidisciplinary teams specializing in design, economics, and development in land use entitlements and underwriting due diligence to optimally blend science and art, align stakeholder interests, overcome barriers, streamline schedules, and produce win-win situations.

Achievements:

- » Maximized triple bottom-lines of clients' portfolios, properties, and projects via green and sustainable solutions; specifically designing and applying practical, cost-effective, innovative sustainable business models.
- » Optimized value of clients' investments such as real estate acquisitions, design, entitlements, developments, and bottom-lines, providing expert advice, leadership, and guidance to achieve visions, goals, and objectives.
- » Secured and/or advised key clients such as AECOM, Chevron Land & Development, DMB, KB Home, Lewis Operating Company/County of Orange, Rancho Mission Viejo, St. Mary's College of California, TRI Pointe Homes, Truman State University, and Valley Crest Design Group.
- » Directed studies to identify and quantify "Sustainable Value Premium" of Green and Sustainable Development in new and resale markets.
- » Performed variety of advisory and leadership roles on major projects such as Sustainable Master Planned Development of Rancho Mission Viejo, California Energy Commission Public Interest Energy Research (CEC PIER) study on land use, California Public Utilities Commission's (CPUC) Big Bold Energy Efficiency Strategy (BBEES), Market Transformation for CPUC on California Energy Efficiency Long-Term Strategic Plan (CEESP), Chevron Land & Development, DMB development of Mesa Proving Grounds, Truman State University's campus- wide Sustainability Initiative, and The Grupe Company Sanctuary development, amongst numerous others.

Program Director, 2003 – 2006

Director of Consulting Services & Project Manager , 1995 – 1996

Le Plastrier Development Consulting Group (LDG), Irvine, California, 1995 – 1999 & 2003 – 2006

Served as senior principal management lead focused on advising national banks, financial institutions, and public and private developers and builders on land acquisitions and entitles, development, design, construction, and

maintenance. Conducted real estate land acquisitions, land development, development feasibility studies, political and project due diligence, and audits on management operations.

Achievements:

- » Spearheaded advisory services for nationwide clients such as CalPERS, Institutional Housing Partners (IHP), Jones Lang LaSalle / Bank of America, Newland, Playa Vista, and Rand.
- » Managed consulting group, project entitlements, development of underwriting criteria, acquisitions, and management operations audits on 100s of projects throughout continental US and Hawaii.
- » Interfaced and led program on behalf of Jones Lang LaSalle; advised Bank of America on their real estate portfolio including defining due diligence underwriting criteria, designing process, building team, and implementing 3rd party due diligence advisory for New Retail Banking Store Initiative for ~100 new banks.
- » Designed underwriting criteria for \$100M land bank, and managed and conducted due diligence analysis for ~15 Montecito Land Bank properties across California.
- » Advised and led multiple major programs for IHP including +200 IHP Capital Partners real estate transactions in US, and major nationwide projects such as AQUA at Alison Island, UA Theatre Site, LAND Initiative, 45 Ranch, William Lyon Homes, and Partners / proposed Student Housing project for IHP/LDCo.

Director of Forward Planning

KB Home Coastal, Inc., Irvine, California, 2002 – 2003

Led and managed all government affairs, networking, due diligence, and project management including coordination of legal counsel, entitlements, agency negotiations, permitting, architecture, DRE, and conditions approval for Fortune 500 and largest homebuilder in US. Served as HOA board member. Partnered with CFD on formations and disclosures. Directed 9-person department including hiring and training 2 forward planners and offsite manager.

Achievements:

- » Cultivated and led world class Forward Planning Dept. driving company's mission to provide premier, disciplined, process-driven service focused on customers, staff, shareholders, and redefining homebuilding industry.
- » Streamlined and optimized company's New Communities process, developing and implementing robust systems and procedures such as communication tools, electronic tool kit, master plan file system, and information management systems; improved 6 out of 7 project starts and openings for +500 closings in 2002.
- » Ensured on-time, within budget, quality execution of up to 20 projects, strategically overseeing schedules and fee and technical budgets spanning from land acquisition through architectural coordination and bond exoneration.
- » Played key role in drafting 2003 Business Plan, provided management training via KB University, and drove monthly "feet to the fire" goal-setting; resulted in 94% achievement.

Vice President of Commercial Development

CAPITAL PACIFIC HOLDINGS, INC. (CPH), Newport Beach, California, 1999 – 2000

Represented diversified premier real estate development company on all forward planning and entitlement issues. Directed and managed environmental / CEQA processes at local, state, and national levels. Hired, trained, managed, oversaw, and led all environmental and land use consultants and legal counsel on multiple concurrent projects.

Achievements:

- » Secured major entitlements such as for 400-key 5-Star Resort with 120 residential units and residential amenities, St. Regis Monarch Beach Resort, from state Coastal Commission, city, and environmental agencies; obtained 1st approval for construction of hotel from Coastal Commission within 4 months of taking over project.
- » Saved +\$2M in anticipated project costs, and eliminated 9-18 months of expected permitting time, strategically planning and redesigning landforms, number and type of units, and processes approach.
- » Maximized returns, minimized risks, and accelerated entitlement schedules, analyzing and repositioning projects.
- » Standardized due diligence analysis, land acquisition, document management, and cost control processes, designing

and implementing innovative tools, and comprehensive procedures and policies.

Adjunct Professor

University of Southern California, School of Policy, Planning & Development, Los Angeles California, 2007

Designed and taught inaugural Sustainable Real Estate Development Course for Master's students in Real Estate Development Program. Details on request.

EDUCATION

Harvard University, Graduate School of Design, Executive Education, Cambridge, Massachusetts

Graduate of Advanced Management Development Program (AMDP) in Real Estate (Challenges of Leadership & Managing People: Strategies for Effective Leadership National Charrette Institute – NCI Charrette Certificate)

University of Southern California, Los Angeles, California

Master of Real Estate Development

Truman State University, Kirksville, Missouri

Bachelor of Science: Economics, Business Minor

LEADERSHIP APPOINTMENTS

- » California Building & Standards Commission's Green Building Standards Code Advisory Committee
- » CPUC's Long-Term Energy Efficient Strategic Plan, Market Transformation Subcommittee Leader California Energy Commission / US Dept. of Energy, Project Advisory Committee, Chula Vista Research Project Truman State University Campus-Wide Sustainability Initiative bringing together administration, faculty, and students President's Sustainable Action Committee, Truman State University (TSU)
- » Designed and implemented TSU's Carbon Neutral Presidential Installation
- » Developed TSU Curriculum, "Applied Sustainability: Optimizing Value from Boardroom to Bottom-Line" Boeing Sustainability Certificate as Expert Advisor

INDUSTRY LEADERSHIP

- » Urban Land Institute (ULI)
- » ULI Sustainable Development Council (SDC) Vice Chair
- » ULI "Best of the Best" in Sustainable Communities – Industry Leadership Award – Committee Member, 2013
- » ULI "Best of the Best" in Sustainable Communities - Awards Committee Member, 2010 – 2013
- » ULI Orange County/Inland Empire District Council – Sustainable Communities Initiative Council - Prior Vice Chair/Assistant Vice Chair, 2010-2012
- » ULI Public Officials Workshop Panellist, Chapman University, California 2009
- » ULI Project Advisory Services Panellist, Traditions – Biloxi, Mississippi, 2008
- » ULI Active Member since 1991; Full Member since 2001
- » ULI Orange County District Council Program: "Sustainable Development: What is it? What is it not? And why is it important for Southern California?" 1995
- » Building Industry Association (BIA)
- » BIA Orange County Member, 2007 – Present
- » BIA Orange County – Construction Quality Sustainable Building Committee Member, 2008-2010
- » Director and Board Member of Orange County Chapter, Home Builders Council, 1999 – 2000
- » Former US Green Building Council Member (USGBC)

- » AIA / World Congress of Architects, "Architects at the Crossroads: Toward a Sustainable Future"
- » Contributed to drafting "Declaration of Interdependence for a Sustainable Future"
- » Provided conceptual design of "Interactive Database for a Sustainable Future" including unique decision making planning tools Total-Cost Pricing ECO-Balance Sheet®, and Mutual Goals Matrix for Economy & Ecology

Note: Extensive list of projects and more than 35 publications and presentations available on request

Pepper L. Smith, Director, Residential Programs

EXPERIENCE

Director, Residential Programs

Davis Energy Group, Davis, CA, 2007 – Present

Manage the residential sustainability consulting group working with LEED for Homes, Energy Star, GreenPoint Rated, Enterprise Communities, Passive House, NAHB, and general residential sustainable building consulting on single family production home, multi-family, and master plan projects. Manage various residential retrofit programs through The Energy Challenge and Energy Upgrade California.

D. R. Horton Inc., Sacramento, CA, 2005 – 2007

Warranty Supervisor, Operations Group, 2006-2007

Performed quality control on all job sites at each stage of the build process; worked with homeowners to ensure all options were installed properly at rough and final. Taught homeowners how the Environments for Living “green” program works in their house and benefits them. Worked with homeowners as a team to determine warranty items and schedule those repairs with vendors; worked with the VP of Building Sciences and project team to obtain LEED certification on participating subdivisions and processed all necessary paperwork for tax credits, rebates and other energy saving programs with local utilities.

Land Project Manager, Land Acquisition Group, 2005-2006

Supported land acquisition group on financial, marketing and environmental analysis on potential land deals utilizing Hanley Wood, Digital Map, The Gregory Group, MLS data, The Ryness Report and field research to determine the viability of each potential project. Wrote executive and marketing summaries and developed financial analyses for each land deal. Worked with the land acquisition managers on contract deal points and escrow closings on viable projects.

Catalina Marketing, St. Petersburg, FL, 1996 – 2005

Program Manager, CRM & IT Services, 2001-2005

Successfully managed projects involving new software development, product enhancements, system migrations and packaged software and hardware implementations, ranging from \$50,000 to \$4MM for US, European and Asian markets. Several projects included rewriting legacy systems using the .Net architecture. Managed project teams of up to 35 people with multiple feature teams and third party vendors keeping open communication between the business stakeholders and the project teams. Consistently negotiated timelines, costs, and requirements for each project to achieve the best product for the time and money available. Helped to implement and customize the Microsoft Solutions Framework software development process into an Integrated Design Process for our company through training and mentoring throughout the company. Maintained Sarbanes-Oxley compliance.

Project Manager, Program Quality and Information, 1999-2001

Took over the management of two new consumer products with stalled sales and increased sales opportunities by creating the necessary back end data reporting needed to show the success of the products to clients thereby increasing repeat and new sales. Streamlined and documented the program set-up process for greater efficiencies allowing for a shorter time to market. Authored all end user documentation and conducted training where needed. By successfully managing price negotiations and production timelines with card production and data entry vendors across the country my team of graphic artists and client coordinators developed successful frequent shopper programs for multiple retailers.

Product Manager, Specialty Promotions and Advertising, 1996-1999

With the creation of two new consumer products for the network system my team increased sales in new product development by \$2MM in one year. We were responsible for the creation of these two products, targeted advertising

and targeted consumer survey, from inception to production including gathering requirements, working with application development to build and test the products, authoring all documentation and conducting sales training.

TEACHING EXPERIENCE

US Green Building Council, 2009 – Present

Faculty. Teach Core Concepts, LEED for Homes 301, and Green Rater workshops. Co-developed LEED for Homes 301 curriculum and was editor/reviewer for the Core Concepts and Green Rater curricula.

LERN Online, 2010 – 2012

Faculty. Developed and taught a four week course entitled “Green Offices” four times per year.

University of California, Berkeley Extension, Sustainable Certificate Program, 2011 – 2012

Faculty. Developed and taught an Integrated Design Process course for sustainable residential building.

University of South Florida, 1994-1996

Graduate Teaching Assistant. Taught undergraduate statistics classes, conducted reviews, graded tests and tutored students.

PUBLICATIONS

LEED for Homes: Challenges From the Builder, Provider, and Green Rater Perspectives. Pepper L. Smith, greenbuildingpro.com, August 25, 2011; reprinted in Blueprints.com, September, 2011.

A Building America Measure and Strategy Guideline: Mitigation of Retrofit Risk Factors. M. Berman, P. Smith, and E. Porse, December 2011.

EDUCATION

University of South Florida, Tampa, FL, 1994-1996, M.B.A. - Marketing

Mississippi College School of Law, Jackson, MS, 1988-1991, Juris Doctorate

University of Southern Mississippi, Hattiesburg, MS 1983-1986, B.S. – Marketing

PROFESSIONAL ASSOCIATION ACTIVITIES

U.S. Green Building Council member: 2007 - present

Green Building Certification Institute Advisory Group member: 2011 - present

GreenBuild Program Working Group member: 2012, 2013

International Living Future Institute: 2013 - present

North State Building Industry Association: 2005 - present

CERTIFICATIONS

LEED for Homes Green Rater: 2007 - present

LEED for Homes Provider Quality Assurance Designee: 2007 – present

LEED for Homes Accredited Professional: 2009 - present

Build It Green GreenPoint Rater: 2008 - present

Willard Dakin, PE, Engineering Manager

EXPERIENCE

Engineering Manager

Davis Energy Group, Inc., 1993-present

Perform engineering analysis, design, and project coordination for a variety of projects, including commercial, institutional and residential energy conservation projects. Responsibilities include computer modeling using DOE-2 and spreadsheet analysis, mechanical design, project management, CAD work, and field auditing. Design and analysis experience includes GeoExchange systems, evaporative cooling, and radiant heating and cooling delivery. Sample projects include:

- » **Pacific Gas & Electric Company GeoExchange Demonstration Program** (1997-Present): Lead engineer in project analysis and review, providing design assistance on demonstration projects. Determination of GHP system performance based on monitored data. Evaluate system optimization alternatives such as hybrid systems, and loop installation and design optimization.
- » **Southern California Edison Commercial GHP Market Evaluation Study** (1996-1997): Developed GHP performance projections for five non-residential building types and eight southern California climate zones using DOE-2 hourly simulation program.
- » **Pacific Gas & Electric Company Residential Retrofit GHP Market Evaluation** (1995): Evaluated overall economic potential of GHP versus other system types for a range of different California climate zones and economic situations. Developed performance projections using DOE-2, and economic evaluations based on regional conditions.
- » **Pacific Gas & Electric Company Advanced Customer Technology Test (ACT²)** (1991-1996): As a member of the Residential Design/Build Team, responsible for analysis of energy efficiency measure (EEM) performance and cost-effectiveness, EEM packaging under rigorous project criteria, reporting of project results, and installation of monitoring hardware. The project included four residential and one commercial site.

Energy Analyst

Western Energy Management, Inc. / Onsite Energy, 1992-1993

Performed energy analysis and savings calculations for energy conservation in existing commercial buildings. Projects included utility bill analysis, preparation of complete energy balance reports, and determination of potential savings through implementation of energy conservation measures (lighting, HVAC equipment, central plant upgrades, controls, and domestic hot water). Analysis performed using simulation programs, bin data analysis, and field audit information.

Solar Technician/Engineer

The Solar Connection, 1990-1991

Assisted in design and installation of solar electric and solar thermal systems for household and commercial use, including stand-alone solar electric systems, solar water heating for domestic hot water, commercial laundries, and swimming pools.

Project Coordinator/Field Manager

Wind Harvest Company, 1985-1986

Coordinated and supervised construction, installation, and operation of several prototype wind turbine designs.

EDUCATION

California Polytechnic State University, San Luis Obispo, B.S. 1991, Mechanical Engineering, magna cum laude. Emphasis in energy systems. Senior project involved the design, construction and thermal performance analysis of a passive solar greenhouse for the Student Sustainable Farm.

University of California, Davis, B.S., 1983, Renewable Natural Resources. Emphasis in renewable energy resources and energy policy.

LICENSES

Professional Engineer License, 1996.
LEED™ 2.0 Accredited Professional (USGBC) certificate
Certified Energy Plans Examiner, 2008
IGSHPA certified

AWARDS

Mechanical Engineering Honor Society (Pi Tau Sigma), 1990
President's Honor List, 1989
Mortar Board National Honor Society, 1988-89. Association of Energy Engineers Scholarship, 1990

PROFESSIONAL

American Society of Heating, Refrigerating & Air-Conditioning Engineers
Association of Energy Engineers

Patricia Ann Heath, Project Manager

EXPERIENCE

Project Manager

Davis Energy Group, Davis, CA, 2006 – Present

Patti currently serves as a Project Manager in the grEEn® Residential Programs group. She is responsible for third party verification of residential projects through LEED for Homes, GreenPoint Rated or Enterprise Green Communities programs. She assists project teams throughout the verification process with program guidelines.

Previous work at DEG included grEEn® Programs Coordinator assisting the grEEn® Consulting Programs Manager with the LEED for Homes Program. For the LEED for Homes program I help callers via phone and e-mail with questions, send out and process applications, set up files, process final certifications. Work with subcontractors on program implementation. Maintain database for projects, including updates and monthly reports, produce marketing and sales pieces, and presentations. Other duties at DEG include proposal preparation for the engineers/scientists; preparing presentations, reports and documents; ad placement; write and edit copy for the website; layout of business plan for DEG's sister company, Advanced Energy Products.

Typist/News Clerk

The Daily Democrat, Woodland, CA, 2004 – 2006

Typed/rewrote press releases; wrote obituaries, wedding, engagement, baby, and anniversary announcements. Handled incoming mail, e-mail and phone calls. Dealt with public and mortuaries on obit placement, including billing. Helped people with submitting press releases and announcements. Proofed pages for accuracy including spelling, grammar and conformity to the Associated Press StyleBook.

Volunteer Work

Lakeview Elementary School, Sarasota, FL, 2003 – 2004

Volunteered for the library and a kindergarten class of an elementary school. Library work include checking books in and out, interact with children from kindergarten through fifth grade, repair and transfer books into new system, shelved, and assisted teachers. Assisted a kindergarten teacher with 5 to 10 students on the computer and assignments.

Assistant Public Information Officer

Senior Friendship Centers, Inc., Sarasota, FL, 1999 – 2001

Assisted the public information officer with press releases, flyers, brochures and newspaper. Interacted with seniors and reported on events at senior centers in a five- county area. We worked with the news media to promote the Center. Developed program manual, brochures and mail merge programs in Word. Also I trained co- workers in Word and Excel.

Temporary Worker

Staffing Professionals, Manatee County, FL, 1998 – 1999

A temporary worker for a large company doing data entry and maintaining an Access database and generating letters. Worked with call center personnel to provide business leads and handle correspondence.

Desktop Publisher

Tetra Tech, Inc., Lafayette, CA, 1994 – 1998

Duties included producing proposals, reports, and presentations using a variety of software including Microsoft Office Suite and Adobe Suite. The department worked closely with engineers, scientists and an editor to produce a complete and accurate product for clients.

Temporary Worker

Contra Costa County, CA, 1992 – 1994

Worked with a variety of employers doing word processing, administration work, desktop publishing and data entry. Businesses included banks, health care, and engineering firms.

Marketing Analyst

Ross Stores, Newark, CA, 1991 – 1992

Worked with newspapers across the country with ad placement for a large discount retailer. In addition, also gathered and analyzed data for advertising buys in new markets.

Marketing Analyst

Leshar Communications, Walnut Creek, CA, 1998 – 1991

Provided the Advertising Department with sales literature, analyzed marketing and circulation data for Leshar Communications. The four-person department also worked closely with the promotions department with in-house advertising.

Marketing Analyst

Des Moines Register, Des Moines, IA, 1984 – 1988

Duties included design, implementation and interpretation of surveys for Iowa's largest newspaper. Produced brochures, flyers, information packets for advertising and checked survey data used in news stories and the Iowa Poll. Previously worked as a survey interviewer and interviewer supervisor before becoming an analyst.

EDUCATION

University of Northern Iowa, Bachelor of Arts – Communications – Radio/TV emphasis

Rockhurst University Continuing Education Center, Technical Writer's Workshop, 1.2 CEU credits, June 2007

CERTIFICATIONS

- » Certified Green Building Professional, Build It Green, May 2008. GreenPoint Rater, Build It Green, March 2009
- » LEED Green Rater in Training, U.S. Green Building Council, December 2009
- » LEED Green Associate, U.S. Green Building Council, May 2010
- » CABEC Residential & NonResidential Certified Energy Plans Examiner, May 2013

Jenifer Jackson, Analyst

EXPERIENCE

Analyst

Davis Energy Group, Inc., 2010 - Present

Provides support for the program administration, marketing and operations functions of the green rating programs, general green consulting services and multiple residential energy upgrade pilot programs throughout California. Responsible for the development of marketing materials for the Sustainable practice area. Responsible for various energy modeling tasks and report writing for Building America and builder clients of DEG.

Administration & Special Events Director

Rotary Club of Sacramento/Rotary Club of Sacramento Foundation, 2004 - 2010

Managed and developed all print and digital mediums including but not limited to internal organizational communication, external communication, all publications of the club and foundation and the club web site. Also recorded; tracked and directed implementation of Board actions with respect to organizational priorities and governance concerns. Additional responsibilities included membership and fund development oversight with direct supervision of the Membership Coordinator and Accounting Clerk, managing and controlling various Club and Foundation expenditures within agreed budgets and events management including annual fundraisers and weekly/monthly events. Acted as the RCS human resources and office manager; responsibilities included scheduling, training and supervising volunteers necessary to provide support for all needs required.

Communications Coordinator

Community Services Planning Council, 2001 - 2003

Responsible for developing and providing oversight on major communications projects and publications, editing CSPC publications, bulletins and other print material including the 2003-2004 Language Resource Guide and developing and implementing an agency communications plan. Provided monthly training to 40+ staff members in various software programs in group and individual settings and technical assistance to staff members in the use of networked computers and software. Other accomplishments include:

- » Development of agency branding policies and coordination of branding campaign
- » Assisted in the formulation and implementation of organizational and program communications policies and strategies
- » Developed procedure manuals for various job responsibilities
- » Developed and streamlined internal staff communication activities
- » Enhanced and maintained 100+ page agency web site

Program Manager, Hands On Sacramento

Community Services Planning Council, 2000 - 2001

Created and managed program annual budget. Responsible for writing proposals for continued program funding and creating program goals and objectives using Outcome Based Evaluation. Acted as editor and publisher of monthly newsletter and implemented web site content and design. Additional responsibilities included: oversight of community and media relations, program marketing and supervision of Volunteer Coordinator staff including volunteer recruitment and retention.

Division Administrator, Regional Policy

Sacramento Metropolitan Chamber of Commerce, 1998 - 2000

Administrative responsibilities focused on tracking government activity and policy decision points and providing Chamber policy information to the general public and training and supervising interns. Also responsible for composing letters and procedure manuals; achievements include co-authoring the Public Policy Council operating procedures and

roles and responsibilities manual. Acted as events planner and was tasked with coordinating and facilitating special programs and events, including Capitol-to-Capitol Trip, Study Missions, receptions and political fund-raisers.

Governance and Education Coordinator

California Optometric Association, 1997 - 1998

Performed policy research and analysis in support of board of trustees, House of Delegates and Presidents Council and maintained official organizational policies including bylaws, codified policy and official records for association related entities. Trained business services coordinator and interns in optometric continuing education processes and was responsible for volunteer recruitment and retention.

EDUCATION

B.A. Organizational Communications, California State University, Sacramento 1994

References

Reference	Projects
Bill Kenelty, Director of Purchasing The New Home Company 2220 Douglas Blvd. #240 Roseville, CA 95661 Phone: 916-771-2223 bkenelty@thenewhomecompany.com	» The Cannery, Davis: » GHG Analysis, Sustainability Plan » Entitlement Process, Design Team » Consulting, ZNE Modeling, » DOE Zero Energy Ready Program
Stephanie Martling, Dir of Asset Mgmt Carmel Partners 1000 Sansome #180 San Francisco, CA 94111 Phone: 415-273-2900 x124 smartling@carmelpartners.com	» West Village Project: » Rambles/Veridian » Solstice: » Community Scale ZNE Analysis/ » Design, LEED for Homes » Consulting, Verifications
Jordan Sager, Sustainability Manager UC Santa Barbara Physical Facilities Bldg. 584 Santa Barbara CA 93106 Phone: 805-893-2661 x1102 Jordan.Sager@pf.ucsb.edu	» North Campus Faculty Housing » KITP Residences » Gateway Towers: » Energy Modeling, LEED for » Homes Consulting, Verifications
Brent Bauman Operations Manager LennarVentures 25 Enterprise Aliso Viejo, CA 92656 Phone: 949-813-0173 Brent.Bauman@lennar.com	» North Campus Faculty Housing » KITP Residences » Gateway Towers: » Energy Modeling, LEED for » Homes Consulting, Verifications
Derek Allen, Director of Development Megan Quisenberry, Project Manager ROEM Corporation 1650 Lafayette Street Santa Clara, CA 95050 Phone: 408-984-5600 dallen@roemcorp.com	» Ajasai, San Jose » Orvieto, San Jose » Baldwin Park, Baldwin Park » LEED for Homes Consulting, » Energy Modeling, Verifications » mquisenberry@roemcorp.com
Derek Allen, Director of Development Megan Quisenberry, Project Manager ROEM Corporation 1650 Lafayette Street Santa Clara, CA 95050 Phone: 408-984-5600 dallen@roemcorp.com	» Ajasai, San Jose » Orvieto, San Jose » Baldwin Park, Baldwin Park » LEED for Homes Consulting, » Energy Modeling, Verifications » mquisenberry@roemcorp.com
Jeff Oberdorfer, CEO First Community Housing 75 E Santa Clara St Ste 1300 San Jose CA 95113 Phone: 408-291-8650 jeffo@firsthousing.org	» El Camino Real, Mountain View » Japantown Sr. Housing » Bassett Street, San Jose » Gateway Apartments, Salinas » Fourth Street Apts, San Jose: » LEED Provider

PROPERTY MANAGEMENT
Cambridge Real Estate Services

CAMBRIDGE

real estate services

Formation

Cambridge Real Estate Services was formed in 2000 by Jeffrey S. Passadore and the then-owner of one of the largest fee management companies in the Pacific Northwest. From its inception, Cambridge's business activities were managed by Jeffrey S. Passadore. In 2005, Jeffrey S. Passadore, with more than 20 years experience in the multifamily property management industry at that time, acquired 100% of the stock in Cambridge Real Estate Services and became the sole owner of the company.

Operating Experience

Cambridge manages approximately 6,000 multi-family units located in Oregon, Washington, Idaho, and California across approximately 90 apartment communities. Current management activities include a wide variety of properties ranging from Class A conventional communities to historic properties. Cambridge manages more nearly 3,500 units of rental housing designated as affordable and which are operated in accordance with Section 42, the Low Income Housing Tax Credit program, USDA / Rural Development, and/or the United States Department of Housing and Urban Development (HUD). Properties under management range in size from less than 25 units to more than 200 units.

Cambridge presently manages three rental communities in the east bay, one rental community on the peninsula, and one re-development site south of the peninsula. These properties represent a total of nearly 400 rental units, most of which are household income-restricted and rent-restricted. In addition to these current management assignments, Cambridge has consulted on and remains involved in pre-development activities for affordable housing developments to be located in the following areas: Hayward, California; Emeryville, California; San Francisco, California; and Santa Cruz, California.

Cambridge offers property management services as well as pre-development and acquisition consultation to clients on a wide variety of real estate investments. Through a wholly owned subsidiary, Cambridge also provides third party asset management oversight for

approximately 4,000 units owned by existing clients and managed by other management firms.

Management Plan

A mutually acceptable management plan between the owner and Cambridge Real Estate Services is a key element in our service. Creating the plan is the initial step of our management services.

Each plan addresses the following:

- » On-site staffing
- » Marketing
- » Physical Upkeep
- » Resident Relations
- » Financial Projections.

Site Supervision

Each property is assigned to an experienced supervisor whose chief responsibility is to insure that the on-site manager's day-to-day performance is timely, efficient and of the highest quality. Regular scheduled as well as unscheduled on-site inspections and, on occasion, inspection by independent shoppers and third-party consultants establishes control. Each property manager has received the necessary professional training to perform their job duties and has an extensive background in management and maintenance. Detailed records of all on-site visits are maintained.

Accounting & Reporting

- » Cambridge performs all standard bookkeeping for the project, utilizing a state-of-the-art, customized computer system.
- » A computer programmer is employed to ensure that the accounting system is flexible and responsive to our information needs.
- » The client is provided with a full range of monthly reports, including detailed income statements, balance sheets and cash flow statements.
- » Reports are completed and mailed by the fifteenth of the month. A brief narrative of the significant events of the previous month accompanies them.
- » Year-end financial reports are easily integrated into the client's tax return.
- » Original resident records are maintained in the central office. A copy of the resident file is maintained on-site.
- » The site manager, with frequent scheduled reporting of deposits to the central office, collects rents. Reconciliation of income is the responsibility of the central office.
- » Our purchasing system ensures effective control of

accounts payable.

- » Accepted industry controls are utilized to ensure safe handling of funds. Books and records are open for audit and inspection at any time.
- » All employees are covered under a \$500,000 fidelity bond.
- » Approximately ninety percent of Cambridge's portfolio is audited yearly by independent CPA

Key Staff Experience

Jeffrey S. Passadore

Jeffrey S. Passadore joined a prominent regional management company as a college intern in 1986. Initially assigned to inspect geographically diverse, low-income housing developments located throughout Montana, Wyoming, Oregon and Washington, his initial exposure to rental housing included aspects of both physical and fiscal evaluation.

Between 1987 and 2000, Mr. Passadore's professional responsibilities included the day-to-day supervision of a diverse portfolio of multifamily communities. Property sizes ranged from 26 dwellings to over 400 units. Properties included both financially and physically stable facilities, as well as properties in need of repositioning and fiscal restructuring.

In addition to the management of stable properties, Jeff has supervised the lease-up of more than two dozen properties, including both affordable and market-rate communities. Jeff has also overseen substantial renovations at more than 25 properties during his property management career.

In the fall of 2000, with the support and assistance of his long-time employer, Jeff formed a new real estate management and consulting business, Cambridge Real Estate Services. Since its formation, Cambridge has provided its clients with pre-purchase consulting services which have resulted in nearly \$75 million in closed transactions. Cambridge has coordinated more than \$100 million in financing for investment real estate under management. Cambridge has completed more than \$10 million in renovations within its management portfolio which now consists of approximately 6,000 multifamily units located in four western states.

Jeff holds degrees in both Management and Marketing

from the School of Business Administration at the University of Portland. Jeff has attended numerous educational courses offered by the Institute of Real Estate Management as well as other industry sources. Jeff is a Certified Occupancy Specialist, a designation granted by NCHM. Jeff also holds both the respected STAR designation and a C13P designation, both granted by a leading Affordable Housing Compliance organization, the Spectrum Companies, holds an HCCP (Housing Credit Certified Professional) Designation from the National Association of Home Builders (through Novogradac and Co., CPAs), and has spoken at several national housing conferences on matters related to the successful development and operation of affordable, urban housing. Jeff maintains active real estate Broker's licenses in Oregon and Washington.

Janeen M. Kallus

Janeen M. Kallus has been involved in the property management industry since her initial hiring as a part-time leasing consultant in 1987. From 1987 through 1998, Janeen worked in various leasing and administrative positions in large, conventional rental housing communities located in the Phoenix, Arizona; Seattle, Washington; and Portland, Oregon markets.

In 1998 Janeen was appointed by a leading regional management company as Property Manager of a 276-unit luxury community located in Portland, Oregon. She was then promoted to the lease-up of a 210-unit A+ community also located in Suburban Portland, Oregon.

After a brief assignment with a national property management company as a regional manager, Janeen joined Cambridge Real Estate Services as a Portfolio Manager in 2003. Janeen's portfolio includes a diverse collection of privately and institutionally owed market-rate and affordable housing communities. The affordable housing communities directly and indirectly managed are located throughout Northern California and together consist of nearly 2,500 rental units in 30 locations. Properties under Janeen's immediate supervision include Section 42 / Low Income Housing Tax Credit Communities, properties financed through and operated under the USDA –Rural Development 515 Rental Housing Program, Bond financed communities and properties supported with a variety of public and private equity sources. Properties managed include both established

communities and multiple assets managed starting with the issuance of Certificates of Occupancy.

Janeen has been instrumental in the oversight of operations, staffing and training for Cambridge Real Estate Services. Janeen is involved in the creation and development of administrative processes and procedures as well as the development of on-going training literature distributed to Cambridge's nearly 200 employees.

Janeen has attended numerous industry training courses and presently holds the Certified Occupancy Specialist designation granted by NCHM, the respected STAR designation and a C10P designation, both granted by a leading Affordable Housing Compliance organization, the Spectrum Companies, and she holds an HCCP (Housing Credit Certified Professional) Designation from the National Association of Home Builders (through Novogradac and Co., CPAs). Janeen was also the first ever recipient of the prestigious ACE Award, an annual award granted by the Metro Multifamily Housing Association of Oregon for exceptional service in the role of Site Manager for rental communities 200 units and larger.

Colin R. Macdonald

Colin R. Macdonald has been involved in the property management industry since his initial hiring as a maintenance technician in 2003. Beginning in 2003, Colin worked in various maintenance positions at both large and small, conventional rental housing communities located in the Eugene, Oregon and Portland, Oregon markets.

In 2005 Colin joined Cambridge Real Estate Services as part of the continuation of his property management industry training and work experience.

At the beginning of 2007, Colin was appointed as the site manager of a 96 unit Low Income Housing Tax Credit mid-rise located in the Old Town neighborhood of Portland. Colin's two year tenure as property manager saw the successful completion of multiple state monitoring and REAC reviews. In May of 2008, Colin received the prestigious ACE Award, an annual award granted by the Metro Multifamily Housing Association of Oregon as affordable housing manager of the year for rental communities under 100 units.

In late 2008, Colin was appointed a Portfolio Manager at Cambridge Real Estate Services. Colin's portfolio includes a diverse collection of privately and institutionally owed market-rate and affordable housing communities. The affordable housing communities directly and indirectly managed are located throughout Oregon and Idaho and together consist of nearly 1,500 rental units in more than 20 locations. Properties under Colin's immediate supervision include Conventional communities, project based HUD properties, Section 42 / Low Income Housing Tax Credit Communities, properties financed through and operated under the USDA – Rural Development 515 Rental Housing Program, Bond financed communities and properties supported with a variety of public and private equity sources. Properties managed include both established communities and rental communities located in challenging rental markets.

Colin is involved in oversight of operations, staffing and training for Cambridge Real Estate Services as well as in the creation and development of administrative processes and procedures which are implemented company-wide.

Colin holds degrees and certifications in Non-Profit Business Management, Planning and Public Policy Management, and Health and Human Services from the University of Oregon. Colin has attended numerous industry training courses and presently holds the respected STAR designation and a C8P designation, both granted by a leading Affordable Housing Compliance organization, the Spectrum Companies. Colin also attends ongoing training certifications through the Idaho Housing and Finance Agency, and the Oregon chapter of the Affordable Housing Management Association (Oregon AHMA).

RESIDENT SERVICES
EngAGE, Inc.

EngAGE: Organizational Profile



Mission Statement

It is our vision to make life a continual process of growth. By providing life-enhancing programs to low- and moderate-income residents living in affordable apartment communities, they will be given the opportunity to continue to grow intellectually, creatively and emotionally. Programming will focus on the combination of mind, body and spirit to promote active engagement and independent living, and to provide residents with a purpose in life.

Organization Description

- » **Federal Tax ID#** 80-0001152
- » **Institution Name** EngAGE, Inc. (formerly More Than Shelter For Seniors)
- » **Formation Year** 1999
- » **Contact Name** Tim Carpenter, Executive Director
- » **Mailing Address** 240 E. Verdugo Avenue, Suite 100
Burbank, CA 91502
- » **Phone** (818) 563-9750
- » **Fax** (818) 563-9315
- » **E-mail** tim@engagedaging.org
- » **Website** www.engagedaging.org

Brief Historical Background & Current Strategic Plan

EngAGE is a nonprofit that transforms aging and the way people think about aging by turning affordable apartment communities into vibrant centers of learning, wellness and creativity. EngAGE: The Art of Active Aging is a nonprofit that takes a whole-person approach to creative and healthy aging by providing arts, wellness, lifelong learning and intergenerational programs to thousands of residents living in affordable apartment communities in Southern California. EngAGE was founded in 1999 as More Than Shelter For Seniors and is a nonprofit hired by the owners of affordable senior apartment communities to provide a whole-person approach to creative and healthy aging for thousands of their senior residents. Since that time, EngAGE has expanded providing its unique services to inter-generational and family communities. We have chosen housing as our platform to deliver a new kind of program that truly engages people and provides them with a sense of self-awareness, value and community.

Additionally, EngAGE produces a weekly radio show, *Experience Talks*, to shine a light on the value of experience in society and change the way people think about aging. *Experience Talks* airs for 250,000 listeners on Saturdays at 8 a.m. on KPFK 90.7 FM in Los Angeles, 98.7 FM in Santa Barbara and streaming live on the web at www.kpfc.org – previous shows are archived on the show’s website, www.experiencetalks.org. The show is syndicated on the Pacifica Network and broadcasts to up to 100 cities nationwide. Previous *Experience Talks* guests include: Judea Pearl, Patagonia founder Yvonne Chouinard, actor Ed Asner, playwright John Patrick Shanley, Senator Gary Hart, Oral Historian Studs Terkel, Aging Guru Andrew Weil, M.D. and many more. Our seniors also appear on the show frequently and *Experience Talks* is used as a culminating event for our senior programs – we teach storytelling and have student projects culminate on the air as seniors do interviews and commentaries such as “In My Experience,” a regular segment on the show.

EngAGE also catalyzed the development of and provides programs for several artist communities. The Burbank Senior Artists Colony, a first-of-its-kind 141-unit senior apartment community featuring a theater group, independent film company, fine arts collective, music program, intergenerational arts program with BUSD and the following amenities for artists in their second 50 years of creativity: 60-seat Theatre, Arts Studios, Music Performance Spaces, Computer Media Arts Center, Digital Filmmaking Lab, Outdoor Performance Areas, Art Gallery and Sculpture Garden.

Our strategic plan is based on the steady expansion of our programs into additional apartment communities in Southern California, providing consulting to other nonprofits and developers of housing in how to actively engage seniors to improve their lives (in the area and outside it), use the arts and creativity to better the community and lives of residents, and to expand the reach of our radio show. EngAGE is paid fees by the owners of each community where we provide programs – this fee-for-service basis for our business plan makes us a solidly founded, self-sustaining nonprofit organization (currently 65% of our annual budget is covered by fees,

reducing our need for fundraising – and it is our goal to increase that percentage).

The results produced by EngAGE programs speak for themselves:

- » Savings to society: EngAGE programs reduce by 25% the number of seniors requiring higher levels of care, representing a \$3,000 per month, per person reduction in cost of care for at least 500 residents, creating an annual savings of \$18 million.
- » The National Endowment for the Arts named EngAGE an Exemplary Program for Best Practices in Lifelong Learning, one of only 10 in the nation.
- » In 2008, EngAGE’s founder, Tim Carpenter, was elected an Ashoka Fellow for being one of the top social entrepreneurs in the world, and in 2011 was given the James Irvine Foundation Leadership Award.
- » Seniors who participate in intensive, participatory arts and lifelong learning programs report improved health, fewer doctor visits and less medication usage. *From The Creativity and Aging Study, Gene Cohen, M.D., Ph.D., George Washington University*
- » “EngAGE had more respondents reporting improved



health in the past year as contrasted to Non- EngAGE sites, where more respondents reported worsening health.” (From the USC study, *Lifestyles of Low-Income Seniors Living in Independent Senior Housing*)

- » EngAGE won the SAGE Award for Program of the Year from the Building Industry Association.

Institution’s Goals & Objectives

Successful Aging:

- » Develop and sustain active engagement
- » Improve physical and mental health
- » Promote sense of purpose and meaning in life
- » Promote positive attitude and self-efficacy

Healthy Communities:

- » Create safe environments in which seniors can live and grow
- » Develop and maintain social support networks and relationships
- » Make senior apartment community part of a healthier surrounding community

Awareness:

- » Increase awareness of EngAGE programs
- » Increase awareness of opportunities in each community
- » Increase senior awareness of their own abilities, dreams, goals & purpose
- » Increase societal acceptance and awareness of seniors and their worth

We believe that the secret to sustainable programs and successful aging is to encourage and allow seniors to assume responsibility for their own quality of life and to take on healthy lifestyles (instead of providing fish, teach them to fish).

The goal of keeping the independent senior healthier and independent longer is vital to success. The average cost of the affordable apartment unit is approximately \$500 per month. The average cost of an assisted living unit, for which there exists no current housing subsidy, is more than \$3,500 per month. A nursing home or board and care facility would cost much more, and would be more restrictive, substantially reducing their quality of life. The seniors that EngAGE serves cannot afford these alternatives and end up in drastically lower quality board and care and residential facilities, or remain in their apartments and inappropriately become more frail and helpless.

Programs Provided

EngAGE programs are provided onsite at senior apartment communities, are open to seniors from the surrounding community as long as there is room in the class, and are delivered at no cost to seniors. We believe that this reduces the primary barriers to engagement – cost and transportation. All programs are taught by college-level professionals and operate on a semester basis, like college courses. We provide programs in seven categories, listed below with examples of many classes in each. Each category of programming represents an important component of the whole-person approach that EngAGE purports and that has been proven to work in engaging seniors and helping them to become healthier and happier.

I. Wellness

- » Tai Chi
- » Yoga
- » Aqua aerobics
- » Adapted Pilates
- » Dance exercise
- » Strength training
- » Flexibility and balance
- » Healthy cooking
- » Healthy lifestyle/anti-aging
- » Wellness fairs
- » Falls prevention
- » Food banks
- » Gardening (food and flowers)
- » Stress reduction
- » Learned optimism
- » Grief groups
- » Managing depression
- » Meditation

II. Lifelong Learning Education

- » Computer classes
- » Internet and e-mail
- » English as second language (ESL)
- » Languages
- » Disaster preparedness
- » Current events
- » Disease management support
- » Successful aging
- » Lecture series
- » Grey Matters (spiritual/cultural traditions)

III. Creativity/Arts

- » Creative writing (fiction, plays, films)

- » Storytelling
- » Poetry
- » Radio storytelling
- » Interviewing for media (radio & TV)
- » Acting
- » Filmmaking
- » Photography
- » Drawing
- » Painting
- » Collage
- » Life Drawing (live models)
- » Portraiture
- » Art exhibits
- » Music appreciation
- » Film appreciation
- » Needlecrafts
- » Jewelry making
- » Creativity 101
- » Printmaking (computers, copiers)
- » Cultural expeditions
- » Website creation

IV. Community Building

- » Celebrations
- » Multicultural festivals
- » Conflict management
- » Resident relief
- » Concerts
- » Resident Committees
- » Multi-cultural Karaoke
- » Wisdom circles (valuing experience)
- » Dinner clubs
- » Movie nights
- » Games nights

- » Social outings

V. Intergenerational:

- » Community/school volunteers
- » Student community service
- » Supervised internships
- » Living history (schoolchildren)
- » Mentoring schoolchildren, at risk youth
- » Read Aloud for Literacy
- » Community Mural Painting
- » Computers
- » Creating clothes for hospitalized babies
- » Web design

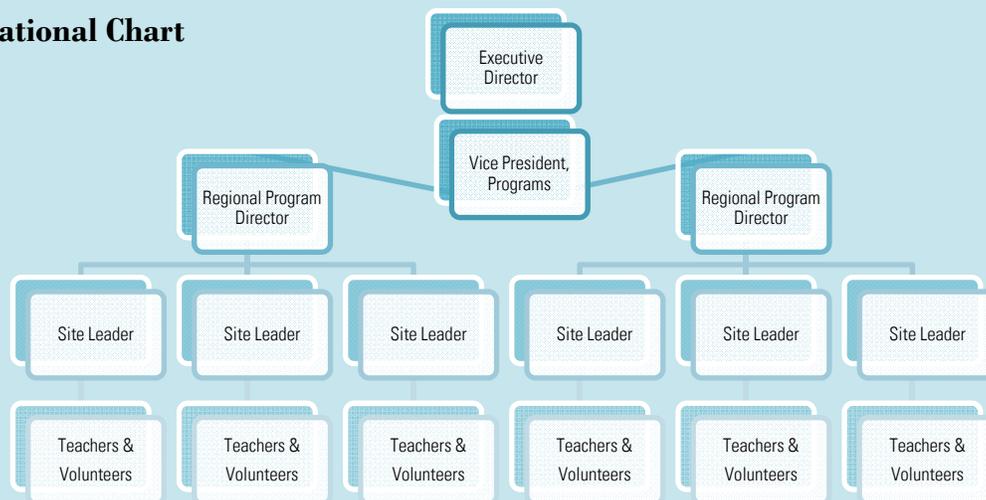
VI. Events:

- » Olympics
- » EngAGE in Creativity
- » Stage Productions (old time radio shows, plays, films, etc.)

VII. Experience Talks Radio Show:

- » Regional show with 250,000 listeners on KPFK FM-90.7 broadcasts from Santa Barbara to Tijuana Saturdays at 8 a.m., streams on the web and is syndicated on the Pacifica Network to up to 100 cities nationwide
- » Show features interviews, radio documentaries, music, senior-produced segments, intergenerational content, etc. with a focus on EXPERIENCE
- » Brief list of show guests: Ed Asner, Studs Terkel, Arianna Huffington, Gary Hart, directors Michael Apted and John Badham, Sherry Lansing, George Segal, writers John Patrick Shanley, Calvin Trillin

Organizational Chart



and Robert Stone, The Chambers Brothers, jazz icon Kenny Burrell, Dr. Andrew Weil and more

Geographic Area Served

Los Angeles and Orange Counties in the following cities: Burbank, Anaheim, Commerce, Duarte, Pomona, North Hollywood, Buena Park, Garden Grove, Fountain Valley, Hollywood, Huntington Park and Norwalk. We grow by 2-3 properties per year and will expand into Ventura County in the coming two years.

Staff Size

4 full time, 50 part time, 50 volunteers, 10 unpaid board members

EngAGE in Creativity Program

EngAGE in Creativity is a community-based multidisciplinary arts program taught by professional artists, providing college-level arts and creativity classes, programs and events to low- and moderate-income residents, delivered on-site at the affordable apartment communities where they live at no cost to them. Low-income seniors are prone to declining health due to the effects of aging, unhealthy lifestyle habits and lack of access to quality programs, and they therefore cause a severe financial and social impact on the systems that

provide healthcare.

In short, the population that EngAGE works with has two strikes against them – statistics show that healthcare costs rise and quality of life declines dramatically: a) the older they get, and b) the less income they earn. EngAGE is expanding the EngAGE in Creativity program from the Burbank Senior Artists Colony, where it has been successfully piloted and recognized as a model program by the NEA, to all 16 additional EngAGE apartment communities. This would bring professionally-led multidisciplinary arts programs to thousands of additional low- and moderate-income seniors living in Southern California.

EngAGE has developed techniques to engage residents and achieve our objectives that we have proven to be effective and have won numerous awards for in the aging industry:

- » **Design** - we include residents in the design of programs through focus groups, surveys and meetings with the artists;
- » **Semester System** - our programs are designed like college courses, operating on a semester basis allowing classes and teachers to change and students to advance through levels of arts programs;



- » **Culminating Events** - our classes culminate with events, providing students with the opportunity to utilize their newfound skills in real-world applications such as art shows, poetry readings, staged performances (e.g. a writing class writes a performance piece and an acting class performs it for the surrounding community) and the Experience Talks radio show (we teach seniors to write radio pieces and play them on the air).

EngAGE staff design the content and mix of programs tailored to the desires, skills and interests of each group of residents, using information from introductory classes, resources gathered from the community and EngAGE teachers. We introduce Artists Colony residents as role models and guides - especially those that were not artists prior to moving to the community but who discovered their inner artists due to the program. The project will be heavily promoted in each community (both internally to apartment residents and to the community at large) through local artists, community groups and media with the use of flyers, invitations to meetings, press releases and public forums.

The EngAGE in Creativity program addresses the need to engage residents in substantive creative programs (as opposed to the condescending arts and crafts programs of years gone by, that simply provided busy work for them) – to truly challenge them to achieve, and to give them a sense of purpose by involving them in arts programs with local youth.

In order to best understand the efficacy of the program, here is the story about one person engaged in it:

Before moving to the Burbank Senior Artists Colony, Suzanne Knode, 67 and surviving on social security income alone, well below the poverty level, was depressed, had suffered a traumatic accident and was in chronic pain. After moving into the unique apartment community, Suzanne attended an EngAGE writing class. She had never written before, did not think of herself as a writer, but wondered if she might like it. She wrote a screenplay as a class assignment and her project, Bandida, was made into a short film. The making of her film, and her story of reinvention, was profiled on national television on the show This American Life on Showtime. Suzanne is now working on several new film and stage projects and has also taken up painting in an EngAGE art class. She has returned to full health with a

new lease on life. Here is what she said when profiled on the Experience Talks radio show: "I couldn't believe that there would be a community for me at this time in my life. I didn't think I'd be able to find something new inside of me. You know that same feeling when you got out of school and the whole world was open to you? Now, all over again, the whole world is open to me."

Evaluative Method

As mentioned before, we know that the impact of the program is profound due to the direct connection of our "EngAGE in Creativity" program to the proven research on the effects of creativity on healthy aging captured in Dr. Cohen's landmark study. Therefore, the two measurable outcomes that we plan to achieve with the requested funding are:

- A. Expansion of "EngAGE in Creativity" into an additional 15 communities by providing at least two programs per month at each site;
- B. Engagement in the program at each site of a minimum of 40% of the residents in at least one program per month.

Evaluative measures will include monitoring of programs at each site by EngAGE program staff, attendance sheets collected by EngAGE teachers, satisfaction surveys of students, a focus group at each site run by EngAGE program staff, collection of class projects and attendance of all program events by EngAGE program staff and upper management. EngAGE has a 10 year track record of successfully expanding programs from one or two of our sites to multiple sites over large geographic areas and has an established management structure in place to do so. We also have a proven track record of setting and achieving goals to engage residents in programs.

Detailed "EngAGE in Creativity" Program Goals & Objectives

1. Expand "EngAGE in Creativity" into additional 15 communities
 - a. Create programs in partnership with residents at each new site through focus groups, surveys (creating ownership and buy-in)
 - b. Provide a minimum of 2 programs per month at each new site
 - c. Implement and monitor established EngAGE program expansion phases (Orientation, community building, program development,

program maintenance – see descriptions below from programs manual of “EngAGE Programs Phases”)

2. Achieve engagement in the program at each site of a minimum of 40% of residents in a minimum of one program/event per month.
 - a. Promote programs through dissemination of enticing flyers, posters and meetings to announce and highlight classes and teachers at each site
 - b. Create word-of-mouth by teaching the teachers to create senior student leaders who work to get others involved in classes at each site
 - c. Create motivation to attend at each site through use of culminating events (art shows, appearances on radio show, graduation diplomas, celebrations of skills)

Financial Information

EngAGE’s strategic plan is based on the steady expansion of our programs into additional apartment communities in Southern California, providing consulting to other nonprofits and developers of housing in the area and outside it, and to expand the reach of our radio show via distribution. EngAGE is paid fees by the owners of each community where we provide programs – this fee-for-service basis for our business plan makes us a solidly founded, self-sustaining nonprofit organization (currently 65% of our annual budget is covered by fees, reducing our need for fundraising, and it is our goal to increase that percentage).

Key Project Artists and Project Staff

The most important aspect of this program in terms



of reaching our program expansion goals - to engage residents in high-end arts programs - is the use of professional artists and arts teachers in our program. By bringing in professional, and in many cases famous and world-renowned, artists the promotion of classes, programs and events will create a buzz in the community that will draw large audience participation. We have gathered a group of artists that won an NEA grant under the very competitive "Presenting" category.

The following Artists will participate in the EngAGE in Creativity project:

John Outterbridge. Mr. Outterbridge has a great deal of experience in the various aspects of the project. He participated in collaborative projects in Amsterdam and Pompidou, Paris, as well as many in Los Angeles area. He is a highly sought after spokesperson for the arts, has participated in many panels and expresses his love for and expertise in storytelling – both visual and verbal.

Vladimir Atanian. Originally from Armenia, Mr. Atanian has collaborated on Public art projects in Europe and the US; he has put the arts at the service of communities in the wake of national disasters, for communities of visually challenged children, and California children escaping from gang membership. He currently directs an art school in Glendale, CA to keep the arts alive for schoolchildren.

Phoebe Beasley - Phoebe Beasley is a multi-accomplished artist that has been honored by two American Presidents and celebrates the African American experience. "Phoebe Beasley's eye has never failed her; has never lied to her, and her art generously gives us beauty, information and always the truth." - Maya Angelou. Phoebe works in mixed media and collage and has a long tradition of weaving personal storytelling into her craft.

Seth Isler/Susan Sullivan - Seth Isler is an actor/director/producer and Susan Sullivan is a director/producer, both of which have worked in film, television and stage productions. Seth Isler is an accomplished actor, director, writer and television/film producer. For the past eight years he served as Producer and VP of Development at Greystone Television and Films. He has extensive field-producing experience and has Produced and Co-produced many History Channel, MSNBC and

A&E specials, biographies and series including the award-winning *The Unfinished Civil War*, and A&E's Biography of *David Ben-Gurion, the Lion of Judah*, both which he also narrated. Susan has logged more than 20 years at the helm of entertainment, corporate, theatrical and publication projects. She began her design career as a graphic artist working for publications, including *Architectural Digest* and *Bon Appetit* magazines.

Dominique Moody – Dominique Moody is an internationally accomplished assemblage artist working with found objects that reflect community roots and personal stories. She has suffered the loss of sight through macular degeneration and works with people to especially highlight their challenges in their artworks, especially the disabled and elderly.

Karmin Murcelo – Karmin Murcelo is an accomplished actress well known in the Chicano communities of Los Angeles from her work in Novellas on Spanish-speaking TV stations. She has also worked in major TV, films and stage productions, as well as street theater. *Nosotros*, the organization founded by Ricardo Montalban, has honored Ms. Murcelo with its "Golden Eagle" award. For her performance in Ruben Gonzalez *THE BOILER ROOM*, at the Old Globe in San Diego, she received a best actress nomination from the San Diego Theater Critics Circle, and a second best actress award from *Dramalogue*.

Shelley Friedman. A young prize-winning documentary film-maker, Ms Friedman vows to bring the arts and seniors together. She currently volunteers in the Vital Voices program for the parent organization, helping seniors tell their stories for radio and blogs.

Len Lesser. Mr. Lesser is an actor in film, television and on the stage. He is a member of A Noise Within repertory company and has collaborated with theater and filmmaking collectives for years. Mr. Lesser has acted in hundreds of films, television shows (most famously *Seinfeld*) and stage productions and has been an acting teacher and coach.

Aimee Bender - Aimee is the author of three books: *The Girl in the Flammable Skirt* (1998) which was a NY Times Notable Book, *An Invisible Sign of My Own* (2000) which was an L.A. Times pick of the year, and *Willful Creatures* (2005). She teaches creative writing at USC.

Kamau Daáood - a renowned performance poet, Kamau is artistic director of LA's' World Stage Performance Gallery, which he co-founded with master drummer Billy Higgins. His poetry works include his award-winning CD "Leimert Park" and the book "Language of Saxophones."

Stephen Mazur - Screenwriter whose credits include the feature films *Liar, Liar*, *The Little Rascals*, and *Heartbreakers*. He also wrote the teleplays, *The Crooked E: The Unshredded Truth about Enron* for CBS and *Wedding March* for A&E. He teaches at the UCLA Writer's Program.

John Sacret Young - John Sacret Young is an Award-winning writer, director and producer of "The West Wing" and "China Beach." Young's memoir is *Remains: Non-Viewable* and his novels are *The Weather Tomorrow* and *The Black Rainbow*.

Louise Steinman - Louise Steinman is author of *The Souvenir: A Daughter Discovers Her Father's War*, *The Knowing Body: The Artist As Storyteller in Contemporary Performance* and she is currently completing a book titled *Through the Crooked Mirror: My Conversation with Poland*.

Promotion, publicity, dissemination

The project will be promoted to local artists, community groups and media through flyers, invitations to meetings, press releases and public forums. EngAGE has years of successful experience promoting its projects and events.

Key Staff

Tim Carpenter, Executive Director/Founder - Tim has more than 20 years of experience in senior housing, services and healthcare. Prior to founding EngAGE and the Experience Talks radio show, he served as Chief Development Officer for Med/Max Health Management, developing hospital-affiliated senior health centers in five states. He also worked as Director of Program and Business Development for Psychiatric Management Resources and as Marketing Director for Horizon Health Management, creating systems for treating mentally ill seniors. Prior to his entry into the senior services arena, Tim worked as a journalist and advertising copywriter and holds a Bachelor of Arts in journalism from San Francisco State University. In 2008 he was one of 15 social entrepreneurs from around the world to be inducted into an international fellowship by Ashoka: Innovators for the Public.



Maureen Kellen-Taylor, Ph.D., Vice President -

Maureen has worked in the field of Arts and Aging for over 25 years, during which she was Founding Director of Artworks in San Francisco - another exemplary organization recognized by the National Endowment for the Arts - where she received Artist in Residence awards from the California Arts Council for 5 years. She earned a M.A. in Expressive Arts Therapy and a Ph.D. for conducting research in Learning and Change in Human Systems. Maureen taught in Lifelong Learning programs for several colleges for more than 12 years and also integrated the arts into elementary and middle school curriculum when working as artist-in-residence in San Francisco Public Schools. In 2005 she received the Directors Award from the California Arts Council for a life time commitment to the Arts.

Robin Hart, Regional Programs Director -

Robin implements and maintains the quality of programs provided by MTSFS. She has worked in the film and television industry for more than 20 years as a producer, editor and writer for networks such as Discovery, The Learning Channel, PBS, Animal Planet and The History Channel. Robin has also served as a Living Section editor and freelance reporter for the Glendale News Press and Foothill Leader. Robin attended Marlboro College in Vermont and documentary film school at the State University of New York at Purchase. She is a Buddhist nun in the Tibetan tradition.

Michelle Yu, Regional Programs Director -

Michelle implements and maintains the quality of EngAGE's programs in the northern region of Los Angeles. Bringing communities together through social services and creativity have always been her passion. For six years, she worked on policy research, affordable housing training, and fund development for the causes of homelessness and mental illness. She has also worked with a nonprofit art studio on Skid Row to promote expression and wellness among homeless people with mental illness. Michelle earned her Masters in Public Health from University of California Los Angeles, specializing in socio-cultural aspects of health.

Sidni Myles, Programs Manager -

Sidni manages the Piedmont site for EngAGE. She has more than fifteen years work experience within the fields of research, education, program management, psycho-social services, government relations, community outreach and advocacy through organizations like UCLA, Project Open Hand, Kaplan Inc., Lynwood and Albuquerque School Districts, and various

community groups. Sidni is in current pursuit of a Masters Degree in Education emphasis cross cultural diversity with National University, holds a Masters Degree in Public Health from San Jose State University, and a Bachelors in Science from San Francisco State University in Health Education.

Bob Fitzgerald, Fitness Director -

Bob is a certified personal trainer with more than 40 years of experience in the fitness field. He began his career as a professional wrestler, has run several marathons, including the New York City Marathon, and has taught strength and flexibility training with numerous sports teams. Bob is now 74 years old, which gives him a better understanding of how a senior's body reacts to the effects of aging and therapeutic exercise. He is currently the Fitness Ambassador to Los Angeles for Stanford University Medical Center's 50-Plus Fitness Association.

Nancy Goodheart, Social Service Coordinator/Fitness

Instructor - Nancy has taught at the preschool, high school and adult school levels in Maryland, New York and California and has directed many recreational and educational programs for both municipal and private organizations. She finds her greatest enthusiasm in promoting health for seniors through exercise and movement. She holds a bachelor's degree in Recreation Program Planning/Physical Education from the University of Maryland and a teaching credential from Cal State University Long Beach in Physical Fitness, Health and Safety for Older Adults.

Quotes:

I am very interested in the activities this organization is doing with seniors and enjoyed the opportunity to visit and talk with the staff on a number of occasions about their important work. Since the completion of the Artist's Colony I have followed the organization's development in the community and have seen a profound impact on the seniors who live there due to their work. I have known Tim Carpenter, Maureen Kellen-Taylor and their staff for a number of years in conjunction with this project and have great respect for their work. - *Wayne Cook, Arts Program Specialist, California Arts Council*

"The Burbank Senior Artists Colony provides a special place where people can come together around their common interests in arts and culture to create a new community. Diverse residents learn, share, and support each other." - *Laura Zucker, Executive Director, Los Angeles County Arts Commission*

The positive impact on senior citizens of the programming by More Than Shelter For Seniors at Piedmont Senior Apartments and Park Plaza Senior Apartments in North Hollywood cannot be overstated. I am familiar with the Burbank Senior Artist Colony and hold the same high opinion of the work done by More Than Shelter for Seniors at that location. It has been my pleasure to work with Tim Carpenter and his staff at More Than Shelter For Seniors and I have great respect for their passion and professionalism. – *Regina Kirschenbaum, Project Manager, Community Redevelopment Agency of the City of Los Angeles*

I have seen a profound impact on the seniors who live in our community due to the work of More Than Shelter For Seniors at the Burbank Senior Artists Colony. I have worked with Tim Carpenter and his staff for more than eight years in conjunction with the Burbank Senior Artists Colony and have the greatest respect for their work and mission. Based on the success and positive impact enjoyed by the Burbank community, I strongly support the proposed project to expand the programs developed at the Artists

Colony to their other low-income properties as I believe that the arts has a positive effect on the seniors and the community. – *Ruth Davidosn-Guerra, Assistant Community Development Director for Housing & Redevelopment, City of Burbank*

“I couldn’t believe that there would be a community of writers and actors and filmmakers and painters that would exist for me at this time of my life. One of the requirements was that you had to be 55 or older – I think it was the first time I ever met a requirement. I never thought that I would be able to find something else that’s new inside of me. You know that same feeling when you got out of school and the whole world was open for you? Now, all over again, the whole world is open to me and I have no idea what it’s going to bring.” – *Suzanne Knode, Writer*

“As an artist, the advantage of living at the Burbank Senior Artists Colony is it allows us that work with the arts to have a synergistic relationship with each other – the individual artist exposed to this can then create more than when working alone.” – *Gene Schklair, Sculptor*

