

1. Team Qualifications and Relevant Experience

Overarching Summary

Health Equity Rising (formerly known as Health Action Together / Sonoma Connect | Sonoma Unidos) is honored to share solution ideas for the Tierra de Rosas Civic Parcel, in partnership with a **community-led, multi-sector coalition** of community leaders, philanthropy, government and Community-Based Organizations (CBOs). We view this proposed coalition as being instrumental in ensuring that the ownership, development and operation of the Tierra de Rosas Civic Parcel:

- Truly benefits the needs of Roseland's Latine community;
- Reflects the cultural identities and wisdom of Roseland's Latine community;
- Is driven by, designed and led by Roseland's Latine community itself; and
- Is bolstered by intentional processes that ensure authentic community engagement, strategic financial planning and long-term, operational sustainability.

Health Equity Rising proposes to utilize its strong expertise and extensive experience in Sonoma County and the Roseland neighborhood, to convene and coordinate the **Tierra de Rosas Civic Coalition (TRC Coalition)** - a collective effort of community leaders and multi-sector partners who are committed to advance Tierra de Rosa's overarching objective to **invest in and uplift our historically underserved communities**. The TRC Coalition proposes an intentional, six-month exploratory process, in order to finalize strategic planning; mobilize community-wide support and additional partners; and identify key consultants, developers and financial partners. Through this process, the Coalition will complete:

- A community-validated **Conceptual Design Plan** and realistic **Total Project Budget** (+/- 15%, currently estimated at \$25M), aligned with the Sebastopol Road Urban Vision Plan City of Santa Rosa General Plan, and dependent on City of Santa Rosa Design Review and Preservation Board approval.
- A strategic **Feasibility Assessment** and **Financial Plan** that expands on the key financial strategies described in this RFI, including the identification of key financial partners, consultants, government grants, and prospective funding sources to bolster an expansive Capital Campaign.
- A **Community Engagement Plan** that ensures that Roseland's Latine communities are authentically and directly engaged in the design, programming and operations plans for Tierra de Rosas' Civic Parcel.
- A **Programming Plan** informed by past community engagement efforts in the Roseland neighborhood led by Health Equity Rising's *Agenda for Action*; Sonoma County CDC and MidPen Housing's recent and prior Tierra de Rosas engagement strategies; and continued community engagement strategies guided by Health Equity Rising's *Community Action for Health Equity Team*.
- **Operational and Sustainability Plans**, ensuring compliance with existing entitlements and shared maintenance obligations, with community-led staffing structures and long-term sustainability strategies.

The Roseland neighborhood holds a rich, historical foundation of community-leadership, cultural wisdom, resilience, and vision. The people who live here — and the organizations and agencies that support them — hold the knowledge, relationships, and lived-experience necessary to shape spaces that truly reflect the community's needs and aspirations. The proposed effort described in this RFI is not about a single organization leading the way — it is about building a Coalition and collaborative table where decisions are informed by those who live, work, and provide services in Roseland every day. Together, we can demonstrate that civic spaces should not simply be built for the community, but with and by the community.

- a) **Organizational Structure:** **Health Equity Rising** actively addresses the root causes of health equity and economic disparities by facilitating systems change efforts through community leadership, multi-sector partnerships and a County-wide Network that utilizes the [Accountable Communities for Health Framework](#). In addition, Health Equity Rising uses the [Community Information Exchange Model](#) by implementing its **Resource Connection Network** - a cross-sector, integrated referral and technology platform with over 20 multi-sector Sonoma County users. These efforts have led to shared decision-making and power shifting

among populations impacted by inequities, in partnership with local government, nonprofits, philanthropy and businesses. People most impacted by inequity directly drive Health Equity Rising's efforts, including the development of the [Agenda for Action](#), which identifies key strategies to align partner and community resources to transform Sonoma County and the Roseland neighborhood into a place where a person's skin color, zip code, or place of birth does not determine their health, education, or income.

- b) Proposed Team:** The **Tierra de Rosas Civic Coalition (TRC Coalition)** is a collective effort of community leaders and multi-sector partners who are committed to sharing their collective expertise, mobilizing community support and gathering shared resources. The TRC Coalition proposes a six-month, community-centered process to determine the detailed strategies surrounding the Civic Parcel's conceptual design, financial feasibility, and final plans for community-designed program development, operations and long-term sustainability. Participating partners that bring a wide-range of qualifications, experience and tangible roles in this collective effort include:
- **Health Equity Rising (Community Action for Health Equity Team; Adriana Arrizón, Executive Director; and Saskia Garcia, Director of Strategy and Integration):** As lead convener of the TRC Coalition, Health Equity Rising will engage its long-standing *Community Action for Health Equity Team*, including Roseland residents who directly led the development of the *Agenda for Action*, and have maintained leadership to advance the Roseland neighborhood's Calls to Action. As the key coalition convener, Health Equity Rising will also engage its long-standing, multi-sector partners and Board of Directors, including Sonoma County Human Services and Board of Supervisors, local philanthropy and other culturally-relevant community-based organizations.
 - **City of Santa Rosa (Ana Horta, Community Engagement Director):** Health Equity Rising will engage existing relationships within the City of Santa Rosa, including Ana Horta as a member of the TRC Coalition, as well as City Council member Eddy Alvarez, who represents the Roseland neighborhood. Mrs. Horta is a longstanding community leader and advocate, and a trusted advisor working with communities to ensure authentic community engagement while addressing barriers to language access.
 - **Community Foundation Sonoma County (Óscar Chávez, President & CEO):** Longstanding local funder and philanthropic leader committed to supporting local Latine communities including Roseland, as well as Health Equity Rising. A key Coalition member to inform strategic fundraising and capital campaign efforts, while connecting the Coalition to additional local leaders, philanthropy and prospective funders.
 - **Peter E. Haas Jr. Family Fund (Ralph Lewin, Executive Director and Stephanie Martinez, Program Manager):** Longstanding funder of Health Equity Rising, committed to mobilizing the power of community and philanthropic resources to advance equity with a focus on Roseland families. Key Coalition members to inform strategic fundraising and capital campaign efforts, connecting the Coalition to other philanthropy.
 - **Sonoma CAN (Kathy Kane, CEO):** A core, longstanding nonprofit in Sonoma County and fiscal sponsor of Health Equity Rising, dedicated to equitable transformation that aligns partners and resources to implement community-led solutions that help families reach their full potential. A key Coalition member to mobilize additional community partners and support, with longstanding ties to other multi-sector partners.
 - **First 5 Sonoma County (Angie Dillon-Shore, Executive Director):** Local public funder investing in the optimal development of children, birth to five years old, and the resiliency of historically marginalized families in Sonoma County. Committed to well-integrated systems of care across sectors. A key Coalition member to strategize fundraising and capital campaign efforts, as well as cross-sector partnerships.
 - **On The Move / La Plaza (Amber Twitchell, Associate Director and Lizette Vergara, La Plaza Program Director):** An impactful, longstanding nonprofit in Sonoma County with deep ties to Latine communities and local partners. Key Coalition members bringing expertise surrounding culturally-relevant, community-driven health and wellness programming; strategic fundraising; and community-based leadership.
 - **Latino Service Providers (Stephanie Manieri, Executive Director):** Partners with Roseland's marginalized Latine communities to engage community members and youth, increase awareness of and access to available resources, and influence public policy and inter-agency communication.

- **Raizes Collective** (Isabel Lopez, Executive Director): Empowers and mobilizes Latine communities and youth including in Roseland, through the arts, culture, leadership development and community education.
- **Almas Libres** (Renee Saucedo, Community Organizer): A cultural, community advocacy and empowerment organization in Sonoma County, made up of Latine Immigrant and Indigenous women who build individual and collective power through leadership development and community organizing.

NOTES: Please see Letters of Support from each agency described above, attached separately from this RFI response. In addition, Health Equity Rising and the TRC Coalition would like to acknowledge its openness to partnering with additional respondents of this RFI, if Sonoma County CDC believes this overarching approach and Coalition could be strengthened through additional partnerships and collaboration.

- c) **Geographic Focus:** All Coalition members have longstanding experience working on behalf of Roseland's historically marginalized, Latine communities. The *Agenda for Action*, led through an effort of Health Equity Rising and the *Community Action for Health Equity* Team, identified four specific census tracts in Santa Rosa that rank at the lowest 4% of Human Development Index amongst all Sonoma County census tracts, including Roseland. Health Equity Rising and the multi-sector TRC Coalition, will bring valuable connections and established trust with Roseland's Latine leaders and the community-based organizations serving Roseland, along with a deep understanding of the cultural wisdom and underlying needs of Roseland communities. The TRC Coalition will utilize the deep learnings and community engagement established through the *Agenda for Action*, aligning the Agenda's Calls to Action with the Tierra de Rosas development.

d) **Recent Projects**

Agenda for Action: In 2022, Health Equity Rising mobilized Sonoma County community leaders and key institutional partners through an 18-month community-planning process resulting in the Sonoma County [Agenda for Action](#). The *Agenda for Action* remains an active, community-led response to the disparities identified in *Portrait of Sonoma*, and is being coordinated by Health Equity Rising as a call to action for leadership throughout Sonoma County to invest sustainably in protecting and supporting the wellbeing of marginalized communities, including Roseland. The *Agenda for Action* is strongly supported by County and City leaders, agencies, local funders, community-based organizations and community leaders.

Community Action for Health Equity Team: A community-driven, culturally-informed leadership group made up of local Latine leaders, including Roseland residents, actively implementing the *Agenda for Action*'s key Calls to Action. This team will offer strong community connections to the TRC Coalition, ensuring that strategic planning remains centered in Roseland's cultural values and wisdom, and addresses the neighborhood's underlying needs surrounding health, safety and access to information and resources.

Community Accountability Action Team: A team of key leaders across various Sonoma County sectors, ensuring collective efforts center the voices of increasingly marginalized communities. The Action Team will offer expanded connections and collective strength to the TRC Coalition, through their aligned efforts.

Resource Connection Network: A cross-sector, integrated referral platform designed by Health Equity Rising based on the *Community Information Exchange* model. The Resource Connection Network engages over 20 multi-sector agencies such as Buckelew Programs, Sonoma County Office of Education, Community Organizations Active in Disaster, Child Parent Institute, Community Support Network, Sonoma County Behavioral Health Division, Northern California Center for Wellbeing, First 5 Sonoma County, Santa Rosa Community Health Center, and many others - offering a key network of partners and coordinated services for future Tierra de Rosas programming.

Organizational Capacity Building: Health Equity Rising supports a broad range of Sonoma County organizations developing their capacity to: authentically engage marginalized communities in Sonoma County; provide care coordination and integrated services; and co-create investment models and organizational plans that prepare CBOs for CalAIM reimbursements and upcoming Multi-Payer Fee Schedules, building organizations' capacity to gain predictable reimbursements across their clients' health plans and expand their eligibility for non-clinical supports such as navigation, housing, and peer services.

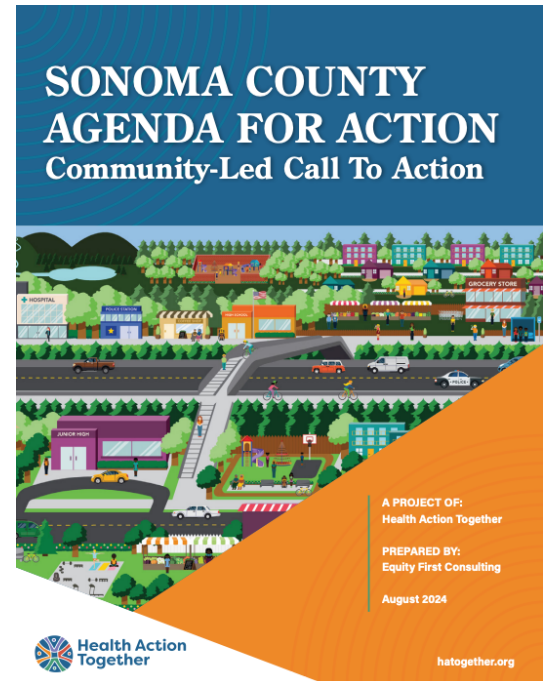
2. Proposed Use Program

Core Objectives: The core objectives guiding Health Equity Rising and the TRC Coalition’s proposed use of the Tierra de Rosas Civic Parcel are aligned with desired goals described in Sonoma County CDC’s RFI:

- **Community Benefit:** Serve the public good through inclusive and accessible space.
- **Cultural Relevance:** Reflect and respect the identity and needs of Roseland’s Latine community.
- **Economic Opportunity:** Provide space that supports non-profits and services that benefit the community.

Agenda For Action: As described above, the *Agenda For Action* developed by Health Equity Rising in partnership with community leaders from the Roseland neighborhood, offers a key opportunity to design future programming at the Tierra de Rosas Civic Parcel based on direct input, and community-designed and culturally-relevant “Calls to Action.” As shown below, the identified core needs and Calls to Action designed by Roseland’s community leaders themselves, are fully aligned with the overarching objectives and prior community-input surrounding the Tierra de Rosas project.

Within the *Agenda for Action*, community members from the Roseland neighborhood call on governments, funders, advocacy groups, community action partners, and all interest holders to **protect and promote health, educational, and economic equity and justice in their community through strengthened investment, policies, and collaboration.** Health Equity Rising and the TRC Coalition view the following components described in the *Agenda for Action* as the 1) Key issues; 2) Overarching Approach and 3) Priority Areas to guide and inform future Tierra de Rosas Civic Parcel use and programming:



Key Issues Impacting the Roseland Community, to inform Tierra de Rosas Civic Parcel Use:

- 1) **Information and Resource Deserts:** Roseland residents experience their community as an “information desert,” a critical barrier to accessing essential services and resources. Despite the high need for support, community members expressed frustration over the lack of readily available resources for basic needs, and opportunities for their families. The overwhelming majority of focus group participants reported a lack of awareness regarding available resources, and even among folks who are aware, many find themselves unable to qualify for existing services due to restrictive criteria. In response to these challenges, community members advocated for a **centralized hub or community center** where information can be easily accessed in a culturally and linguistically responsive manner.
- 2) **Lack of Access to Safe, Open Spaces:** The Tierra de Rosas Civic Parcel and surrounding developments offer a unique opportunity to directly address a lack of access to safe open spaces described in the *Agenda for Action*. Roseland community members described parks as few and far between, and when they do exist tend to be difficult to access, feel unsafe and unappealing, and/or are in disrepair with broken play structures and no (or unusable) bathrooms.
- 3) **Structural Violence, Toxic Stress and Lack of Safety:** Roseland community members described living at the nexus of multiple forms of structural violence, compounded by the pervasiveness of toxic stress in their lives and the negative impacts of perpetually feeling unsafe in their neighborhoods. Community members described large numbers of people suffering from mental health challenges, sometimes including substance use, and the near impossibility of receiving quality, culturally responsive, and affordable care. A pervasive lack of a sense of safety in public spaces (such as on sidewalks and roads and in parks), often drives people inside their houses and away from each other.

- 4) **Barriers to Access and Lack of Language Supports:** Roseland community members expressed extensive concerns about the social service system in their community, especially the barriers to accessing needed services like health care, food assistance, housing support, and job training. For many, the barriers to access included unrealistic income thresholds to qualify given the high cost of living in the area and/or a lack of legal documentation and social security numbers often required. In addition, many do not have the linguistic support they need to apply or to receive the services they were eligible for.
- 5) **Lack of Resources for Youth:** Parents engaged in the *Agenda for Action* described a lack of safe activities and resources for youth. Economic opportunities are limited and access to local recreational activities are scarce in the Roseland neighborhood, which has contributed to the sense that there is a lack of safe and enriching spaces for activities. Families who are forced to juggle multiple jobs to make ends meet are often unable to be with their children or provide a safe space for afterschool activities.

Overarching Approach for use of Tierra de Rosas Civic Parcel: A fully aligned, overarching approach identified in the *Agenda for Action* among Roseland's residents involves a Call to Action to:

*"Promote community agency and increase access to centralized resources through a **community hub**, which is led and staffed by trained community members, and which provides affordable, strengths-based services and supports such as financial literacy, digital literacy, recreation, community-building, information sharing, and resource navigation among other services needed as identified by communities."*

Key Priority Areas to Guide future Tierra de Rosas Civic Parcel Programming:

- 1) **Promote community agency and increase access to centralized resources through community hubs in prioritized communities**, which are led and staffed by trained community members, and provide affordable, strengths-based services and supports such as financial literacy, digital literacy, recreation, community-building, information sharing, and resource navigation.
- 2) **Increase access to high-quality, affordable, multilingual health and well-being services**, including preventative, specialized, and complex care provided in multiple modalities (in-person, peer-led, etc.) without barriers related to immigration status, systems involvement, and/or ability to pay.
- 3) **Strengthen mental health and resilience through evidence-based and culturally-responsive** supports as part of a well-coordinated system of care that destigmatizes mental health distress, communicates effective prevention and treatment strategies, and helps people quickly access needed mental health and well-being services in ways that are affirming, meaningfully accessible, and culturally responsive.
- 4) **Provide relevant and appropriate educational supports and workforce/small business development opportunities** to help community members obtain equitable education, training, skills, and certifications needed to adapt to rapidly changing job market conditions, technological advancements, and industry shifts. This also includes providing needed educational supports for students in grades K-12, such as tailored tutoring, language justice for families and free/ affordable after-school programs.
- 5) **Improve the built environments in communities experiencing the most disinvestment**, ensuring access to safe community spaces for affinity-focused events; connection and collaboration; sharing of resources, support, and information; and physical activity and recreation opportunities.
- 6) **Prioritize and support community leadership**, including prioritization, planning, implementation, and learning. This includes resourcing community leadership appropriately, building meaningful and long-lasting relationships with community members, and centering community priorities throughout.

Existing Sonoma County CDC Community Engagement Efforts: In addition, the TRC Coalition will center recent and prior community engagement efforts implemented by Sonoma County CDC and MidPen Housing, which are fully aligned with the *Agenda for Action* priorities described above. During these community engagement efforts, community members called for the following key approaches, values and programming to guide the use of Tierra de Rosa's Civic Parcel:

Overarching Approaches and Values:

- Ensure preservation of Roseland’s Latine cultural identity;
- Strengthen community ties and opportunities for community gatherings; and
- Be affordable to current residents, and meet real needs without displacing or excluding long-term residents.

Specific Programming Opportunities:

- A multipurpose community center offering youth programming, cultural and arts activities, and/or adult workshops;
- A space for nonprofit organizations to provide services and information;
- A shared commercial kitchen to help residents start food businesses;
- Affordable medical and dental clinics, and culturally relevant wellness services.
- Showcasing local art, music and performing arts



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Additional details of the proposed use of the Tierra de Rosas Civic Parcel will be directly developed with Roseland community leaders who are engaged in the *Community Action for Health Equity Team*, during the six-month process described in this RFI response. The Community Action for Health Equity Team will build off of existing community input described in the *Agenda for Action* and prior Tierra de Rosas community engagement efforts, and gather additional community input as necessary, resulting in a comprehensive Programming Plan.

3. **Community Engagement Strategy**

Health Equity Rising was originally founded on an authentic, and culturally-responsive community engagement approach, which will be maintained throughout its proposed role in convening the TRC Coalition and advancing the goals of the Tierra de Rosa Civic Parcel. Health Equity Rising views its existing, trusted relationships with historically marginalized community members in the Roseland neighborhood as a critical strategy and strength to further advance the community engagement efforts of the Tierra de Rosas project, and ensure Roseland Latine members themselves guide future design, programmatic and operational decisions.

As a collaborative convener, Health Equity Rising will engage, build and foster authentic relationships between Roseland's community leaders and multi-sector partners, through in-person meetings, workgroups and ongoing convenings. Through these efforts, community and institutional stakeholders will take action together on the needs, opportunities and cultural strengths within the Roseland neighborhood, in order to drive the advancement of the Tierra de Rosas Civic Parcel. Three critical teams already established by Health Equity Rising will help guide community engagement efforts:

- The **Community Action for Health Equity Team** includes existing Roseland Latine leaders, who will offer strong community connections in partnership with the TRC Coalition, mobilizing additional Roseland community members while ensuring the Tierra de Rosas's strategic planning process remains centered in Roseland's cultural values, wisdom and lived-experiences.
- The **Community Accountability Action Team** will convene key leaders across sectors, ensuring the TRC Coalition's collective efforts center the voices of Roseland's historically marginalized communities. The Action Team will offer expanded networking opportunities to the TRC Coalition, with additional key institutional leaders and decision-makers within government, business and philanthropy.
- The **Tierra de Rosas Civic Coalition**, described above and throughout this RFI submission, includes a unique, multi-sector collective of key community-based, philanthropic and institutional leaders. The following Tierra de Rosas Civic Coalition members were directly involved in the development of this RFI. Their commitment to engage in the proposed six-month process described in this RFI are further shared within Letters of Support received from each of the nine agencies described below, attached separately from this RFI response:

Community-Based Organizations

- Health Equity Rising (*Lead convener, including the community-led Community Action for Health Equity Team*)
- Sonoma CAN
- On The Move / La Plaza
- Latino Service Providers
- Raizes Collective
- Almas Libres

Philanthropy

- Community Foundation Sonoma County
- Peter E. Haas Jr. Family Fund
- First 5 Sonoma County

Government

- City of Santa Rosa
- *Other expected partners described below*

NOTE: Other government partners, leaders and Health Equity Rising Board members are also expected to join this effort, including leaders from Sonoma County's Behavioral Health Division; Family, Youth & Children Division; Office of Equity; and Board of Supervisors; and City of Santa Rosa City Council members.

Additional overarching strategies of Health Equity Rising's community engagement efforts throughout the proposed work will include:

- Utilizing a ***Design to the Margins*** lens throughout the TRC Coalition's work, centering the voices and cultural wisdom of the Roseland community through authentic engagement and leadership.
- Foster ***safe, community spaces*** of belonging, leadership and healing in order for historically marginalized community members to truly experience support, inclusion and safety.
- Practice ***power-shifting*** from institutional and positional leaders, to Roseland's frontline community members, through transparent and intentional decision-making processes.
- Develop ***Coalition Agreements*** that ensure all participants experience inclusion, being heard and transparency.
- Ensure ***culturally responsive*** community engagement strategies that are responsive to the needs, languages, cultural wisdom, and ways of being for Roseland's Latine community.
- Integrate ***accountability systems*** into the TRC Coalition's work, prioritizing reciprocal, long-term relationship development and feedback loops, recognizing that Roseland's community members are the experts of their own lives..
- Engage ***additional long-standing partnerships*** with community and institutional leaders beyond the proposed Coalition, including the Sonoma County Sanctuary Coalition, Disability Legal Rights Center, Sonoma County Office of Equity, Sonoma County Department of Health Services, Sonoma County Families Collaborative, Los Cien Sonoma County, Equity First Consulting, and others.

4. Financial Strategy and Assessment of Feasibility

Preliminary financial strategies and opportunities are described below, all of which will be more fully explored and developed by the TRC Coalition and six-month process described within this RFI submission. The financial strategies and assessment of feasibility developed by the TRC Coalition, will be aligned with core desired goals described in the RFI, including:

- **Sustainability:** Prioritize green building practices and long-term operational viability.
- **Financially Feasible:** Strong strategies and expanded team of consultants, investors and experts Ability to purchase land, secure permitting and any applicable approvals, finance improvements, and provide for ongoing operations.
- **Near-term Timeframe:** Develop a comprehensive plan for improvements to be completed with operations commencing within five years.

Core Financial Strategies and Sources: The TRC Coalition will utilize strategic, diversified funding streams in order to mobilize the necessary financial resources required for the Tierra de Rosas Civic Parcel's development. The project anticipates an approximate **\$25 million** total development budget utilizing a layered capital strategy, with approximately 70–75% of total costs supported by permanent equity sources — including philanthropy, public grants, New Markets Tax Credit net subsidy, and potential local public participation. The remaining portion is anticipated to be financed through NMTC-structured, long-term, below-market debt designed to be serviceable within the project's operating model. Short-term bridge financing may be utilized during predevelopment and construction and would be repaid at NMTC closing; this bridge financing does not represent permanent conventional debt. Details of funding strategies include:

New Market Tax Credits (NMTCs): Due to the Tierra de Rosas Civic Parcel being located in a Qualified Census Tract (Census Tract 1531.04), and as stated in the RFI, the project meets federal low-income community criteria under the CDFI Fund, meaning developments within the site are eligible for NMTCs — a key financial strategy for this proposed RFI. The project anticipates utilizing the federal NMTC program to generate a significant portion of permanent development capital. Through partnership with one or more Community Development Entities (CDEs), NMTC allocation can attract corporate or financial institution investment into the Tierra de Rosas Civic Parcel project. Based on comparable community-serving developments in the region such as Ceres Community Project, the NMTC structure could generate an estimated net subsidy in the range of approximately \$5–6 million within a \$25 million capital stack.

The Coalition will seek alignment with CDE partners experienced in health equity, community-serving real estate, and nonprofit-led developments, such as the *California Statewide Communities Development Corporation* and the *San Francisco Community Investment Fund*, both of which have deployed NMTC financing for major community infrastructure projects that serve historically underserved populations. NMTC financing may initially be bridged during construction and replaced upon transaction closing.

Philanthropic Capital Campaign and Acquisition Strategy: The TRC Coalition includes local, philanthropic leaders from Community Foundation Sonoma County, First Five Sonoma County and Peter E. Haas Jr. Family Fund, who are actively engaged in shaping the project vision and capital strategy. Their participation strengthens early-stage feasibility by opening access to major donor networks; potentially securing discretionary, non-competitive foundation grants; providing credibility for state and federal applications; and potentially capitalizing a philanthropic acquisition fund for the Civic Parcel. The project anticipates a structured capital campaign targeting approximately 25–30% of total development costs through major gifts, foundation grants, and community-aligned philanthropy. Early philanthropic participation may also support site acquisition during the first year of the proposed timeline below, reducing financing risk and signaling readiness to public and NMTC partners.

State and Federal Grants: The Coalition will pursue competitive state and federal funding streams aligned with health equity, community infrastructure, workforce development, and place-based revitalization. Potential sources may include California State infrastructure or community development funding; health equity or public health capital grants; and federal community development programs. Initial specific grant programs flagged as prospective sources include California's Transformative Climate Communities Program; Community Development Block Grants; and place-based grant programs such as the Department of Housing and Community Development's REAP 2.0 HIT program. The Coalition's strong relationships with County and City leadership also position the project well for strategic alignment with public priorities and potential co-application opportunities.

Local Government Participation: Given the project's alignment with Sonoma County's Public and Behavioral Health Divisions, equitable development priorities, and other City and State initiatives, the Coalition anticipates collaboration with various local government partners. Participation has already been confirmed by key leaders from the City of Santa Rosa, and Health Equity Rising's Board of Directors includes Sonoma County representation as well. Support may take the form of direct capital contribution; fee reductions or waivers; infrastructure participation; land disposition strategies; and/or pre-development support. While modest in proportion to total cost, we view local participation as critical for strengthening competitiveness in state and federal applications and demonstrating unified public-private alignment.

Mission-Aligned Bridge Financing: To maintain construction timelines, short-term bridge financing may be utilized during the NMTC allocation and closing process. This financing would be repaid at NMTC closing and does not represent permanent conventional debt. The long-term capital structure is intentionally designed to avoid traditional amortizing commercial debt; however, a limited portion of project costs is anticipated to be financed through NMTC-structured, below-market, long-term debt that remains after closing and is sized to be sustainable within the project's operating model. This approach prioritizes permanent equity and financing tools while limiting fixed repayment burdens and protecting long-term community access.

Assessment of Feasibility: The feasibility of this financial strategy is strengthened by four primary factors:

1. **Strong Coalition Infrastructure:** The TRC Coalition includes experienced nonprofit leaders, philanthropic partners, and community institutions with demonstrated fundraising and capital campaign capacity. The roster reflects both programmatic credibility and capital access.
2. **Proven Regional Precedent:** Comparable community-serving projects in Santa Rosa such as the Ceres Project and Caritas Center, have successfully utilized NMTCs, layered public funding, and philanthropic capital to close complex transactions in the \$20–50 million range. These precedents demonstrate that a project of this scale is achievable within the regional financing ecosystem.
3. **Limited Reliance on Conventional Debt:** The proposed structure prioritizes permanent equity sources (philanthropy, grants, NMTC subsidy, and public participation), which reduces operational burden and protects long-term sustainability.
4. **Phased Development and Capital Alignment:** The Coalition anticipates sequencing site acquisition, conceptual design, predevelopment, capital campaign launch, and NMTC allocation strategy in a coordinated 4–5 year timeline. Early philanthropic commitments and public alignment will de-risk later capital phases and improve competitiveness for NMTC allocation.

5. Project Timeline

Phase I: Six-Month Planning & Feasibility Phase: The purpose of this exploratory and planning phase is to establish an integrated, community-validated Conceptual Design Plan, Feasibility Assessment, Financial Strategy, Programming Framework, and Operational Plan sufficient to support a formal development decision.

Months 1–2: Alignment, Technical Onboarding & Framework Confirmation

- **Technical Team Engagement:** Engage a multidisciplinary Design Lead (land use architect with civil coordination); and Financial/Development Advisor (with NMTC and capital campaign experience.)
- **Development Framework & Site Constraint Review:** Compile and formalize development constraints, non-negotiables, and shared maintenance obligations.
- **Re-engage Health Equity Rising's Community Action for Health Equity Team** to confirm a process design that ensures community validation and a culturally-relevant engagement approach.
- **Synthesize prior engagement efforts** into a consolidated Community Engagement Framework.

Months 3–4: Conceptual Design, Programming & Cost Validation

- **Conceptual Design Development:** Prepare site plan options aligned with any development constraints and requirements; and develop a preliminary Total Project Budget ($\pm 15\%$).
- **Programming Plan:** Translate prior engagement findings into a spatial and operational program, identifying core uses, community-serving spaces, and flexible program areas.
- **Community Validation:** Existing community leaders gather additional community input; present conceptual design and programming framework through feedback loops; and incorporate refinements.

Months 4–6: Financial Strategy, Feasibility Confirmation & Operational Planning

- **Strategic Feasibility & Financial Plan:** Refine capital stack modeling (NMTC, philanthropy, grants, local participation); identify prospective CDE partners, additional philanthropic sources and major donors; develop preliminary Capital Campaign Plan; and outline bridge financing and NMTC strategy.
- **Operational & Sustainability Plan:** Define community-led governance and staffing model; identify compliance obligations, maintenance responsibilities, and shared infrastructure requirements; and establish a long-term sustainability strategy (earned income, anchor tenant structure, etc.)
- **Go / No-Go Development Decision:** Confirm financial feasibility, capital pathway viability and community endorsement.

Five-Year Development & Implementation Timeline

Year 1: Planning and Feasibility Phase (above), Pre-development and Capital Launch: Secure site control (if not completed during feasibility phase); formalize development entity and governance structure; select lead developer, architect, and owner's representative; launch major gifts phase of capital campaign; and begin NMTC allocation engagement and underwriting discussions.

Milestone: *Site control secured; schematic design complete; lead philanthropic commitments in place.*

Year 2: Entitlements, Fund Development & NMTC Structuring: Advance design to 50–75% construction documents; secure permitting/entitlement approvals; continue capital campaign (foundation + major donor phase); submit state/federal grant applications; formalize NMTC allocation strategy and bridge financing.

Milestone: *Entitlements secured; majority of capital stack identified; NMTC allocation targeted.*

Year 3: Financial Close & Construction Start: Close NMTC transaction; bridge financing deployed; construction begins; finalize operational and facility management structure.

Milestone: *Groundbreaking; capital stack fully committed.*

Year 4: Construction & Organizational Readiness: Vertical construction and site improvements; continued drawdown of capital sources; operational staffing plan finalized; partnership MOUs executed.

Milestone: *Substantial completion achieved late Year 4 or early Year 5.*

Year 5: Completion & Launch: Certificate of occupancy; facility commissioning and program installation; community opening and phased program launch; **improvements completed and operations commenced.**

6. **Maintenance and Operations Plan:** Several operational and maintenance details will be further developed in the proposed six-month planning and feasibility phase, however key strategies and approaches are described below. The Tierra de Rosas Civic Parcel will be structured to ensure long-term operational sustainability while advancing a core mission identified by Roseland community members in the *Agenda for Action*: **Promote community agency and increased access to centralized resources through a community hub led and staffed by trained local residents.**

The project's maintenance and operations frameworks are designed to integrate community-centered governance with clear legal, financial, and management accountability. Together, this framework ensures that Tierra de Rosas' Civic Parcel operates as a professionally managed, financially sustainable community asset—while remaining deeply rooted in resident leadership and shared stewardship.

Governance & Ownership Structure: The property will be held by a designated nonprofit ownership entity or special-purpose entity formed in partnership with coalition members, ensuring clear fiduciary oversight and compliance with financing requirements. Existing local, nonprofit organizations have been identified who hold strong, trusted ties to Roseland's Latine community, as well as proven expertise and impact surrounding the culturally-relevant supports and services prioritized through prior community engagement efforts. Operational authority will be defined through formal governance documents establishing roles for executive leadership, financial oversight, and facilities management. A community-centered advisory or governing body - building from Health Equity Rising's *Community Action for Health Equity Team* - will provide structured resident leadership in programming, operations input, and long-term stewardship.

Facilities Maintenance & Asset Management: A Facilities Maintenance Plan will be established to protect long-term asset integrity. This will include maintenance schedules, lifecycle capital planning, and reserve plans for major building systems and capital replacements. Any shared infrastructure obligations with adjacent parcels will include formal agreements to ensure clarity of responsibility. Adequate operating and capital reserves will be built into the financial plan to reduce long-term risk.

Operating Revenue & Sustainability Model: The operating model will likely blend mission-aligned tenant leases, programmatic grants, service contracts, and earned revenue streams to ensure financial sustainability while preserving community access at no cost for Roseland's historically marginalized communities. Community partners may lease space to deliver services aligned with community input, such as financial literacy, digital literacy, community-building activities, and resource navigation. Potential rental income will be structured to stabilize operations rather than maximize profit, reinforcing the hub's community-serving purpose. The planning and feasibility phase will confirm staffing needs, utilities, insurance, maintenance, and administrative costs, ensuring realistic long-term viability.

Community-Led Staffing & Programming Infrastructure: As envisioned by Roseland community members in the *Agenda for Action*, the proposed use of the Tierra de Rosas Civic Parcel will prioritize hiring and leadership from the Roseland community itself, including training opportunities for local residents to become site managers, community navigators, program coordinators, and peer leaders. A site director will oversee daily operations, compliance, and partner coordination. Programming will reflect community needs and strengths, remain adaptable over time, and will be guided by ongoing resident engagement, lived experiences and community-defined outcomes.

Compliance, Risk & Long-Term Stewardship: The operations plan will include appropriate insurance coverage, ADA compliance, safety protocols, financial reporting systems, and regular audits consistent with public funding requirements. By diversifying revenue streams and minimizing reliance on traditional commercial debt, the project is structured to reduce fixed operating burdens and safeguard long-term community access.