

# Sonoma County No Place Like Home Proposal: North Quarry Apartments, Petaluma

*Prepared for the:*

**Sonoma County Community Development Commission**

**July 27, 2020**



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1. Signed Cover Sheet



July 27, 2020

Barbie Robinson, Interim Executive Director  
Sonoma County Community Development Commission  
1440 Guerneville Road  
Santa Rosa, CA 95403

North Quarry Apartments NPLH Proposal

Dear Ms. Robinson,

Burbank Housing is pleased to provide this proposal in response to the Request for Proposals for No Place Like Home (NPLH) projects to compete in the state's NPLH Round 3 funding cycle later this year. We have site control of a property in Southeast Petaluma at Caulfield Lane and Petaluma Boulevard to develop a new 50-unit affordable rental housing community we're calling North Quarry Apartments.

Importantly, we have an award of 12 project-based vouchers for this property from your agency which we would dedicate to NPLH units. Project-based vouchers are a crucial resource to make the NPLH units financially feasible to develop as well as making the units affordable to homeless persons regardless of their income.

Burbank Housing has successfully developed permanent supported housing units in Sonoma County and we currently have two NPLH projects nearing the start of construction, one in Santa Rosa (Caritas Homes Phase 1) and one in the City of Napa (Heritage House). We are confident in our ability to successfully develop North Quarry Apartments as an affordable rental housing community with 12 NPLH units whose tenants will be supported with services from County Behavioral Health, COTS and Burbank's own Resident Services Department.

Thank you for your consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read "Rich Wallach".

Rich Wallach, Director of Housing Development

## 2. Proposal Overview

### Descriptive Narrative

The proposed project, North Quarry Apartments in Southeast Petaluma, is new construction of 50 units of garden style affordable housing. The property address is 1601 Petaluma Boulevard South. The project will include 15 (30%) one-bedroom units, 20 (40%) two-bedroom units, and 15 (30%) three-bedroom units in a predominantly three-story building. Five units at the third level include a fourth story bedroom/bathroom suite in a dormer configuration. The project is almost a complete replica of the Stoddard West Apartments in Napa, CA which opened its doors in November of 2019 to universal acclaim for its design and compatibility with its surroundings.

Twelve (24%) of the 49 affordable units will be dedicated as No Place Like Home (NPLH) units, supported by an existing award of twelve Project-Based Vouchers from the Sonoma County Housing Authority's Housing Choice Voucher (a.k.a. Section 8) program. These twelve units, entirely one-bedroom units because the overwhelming demand is for single-person households, will be set at the 20% AMI level and will serve NPLH targeted individuals, that is, individuals with a severe and persistent mental illness that are homeless, chronically homeless or at risk of chronic homelessness as referred through the County's Coordinated Entry system.

The 37 non-NPLH units will be rent restricted at the 50% AMI and the 60% AMI levels. One Manager's Unit is also provided.

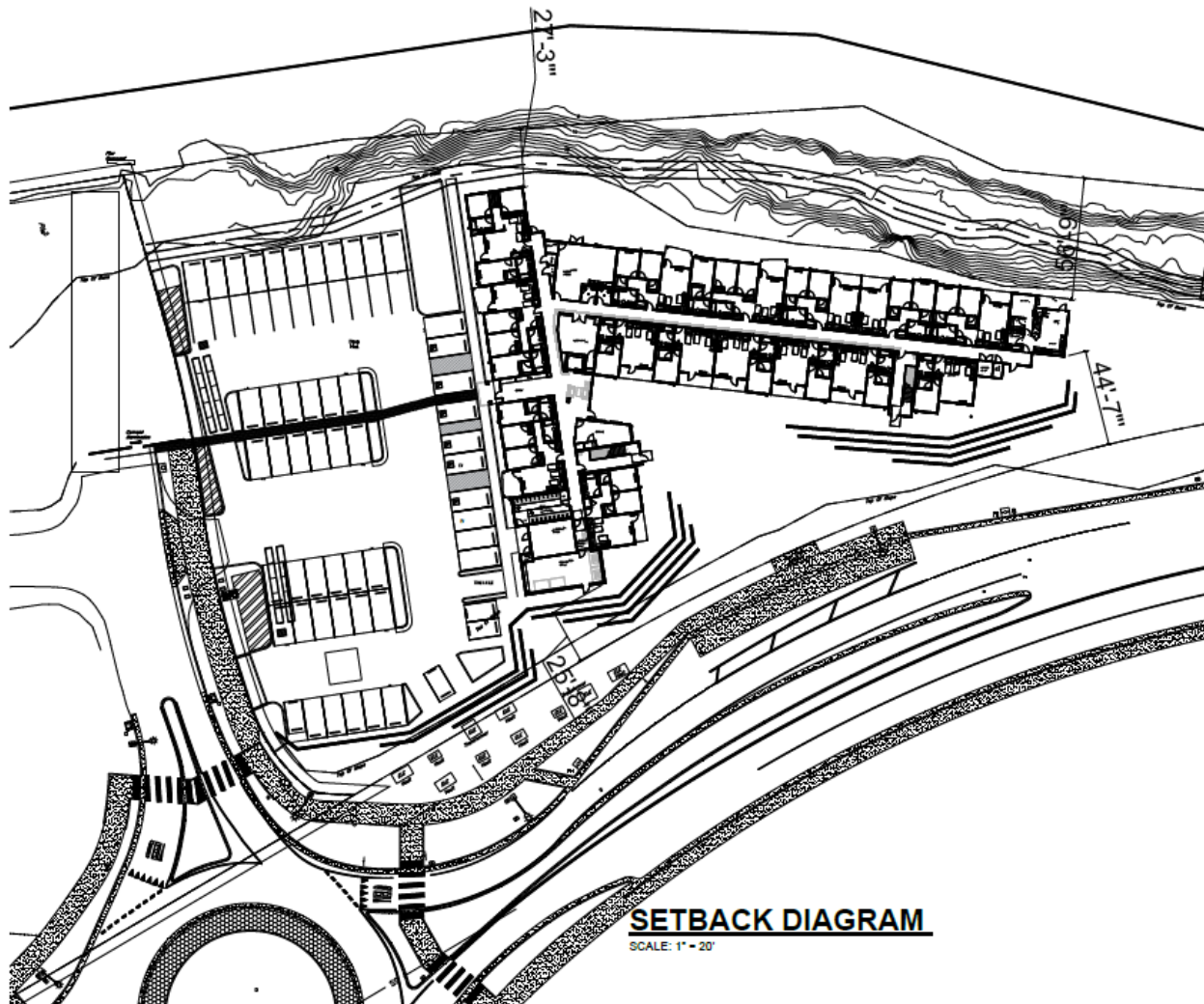
### Services

The services plan for North Quarry will be modeled after the Santa Rosa Caritas Homes Phase 1 project currently in the predevelopment stage. That model employs Sonoma County Behavioral Health function as primary service provider with augmented services from Catholic Charities and from Burbank's Resident Services Department. We propose to replicate that model for North Quarry Apartments but use COTS rather than Catholic Charities because COTS is based in Petaluma and has a strong presence in south county.

See Attachment B: Caritas Supportive Service Plan with budgets for details about the proposed type and level of services to be provided. Attachment C: COTS letter 7-24-2020 documents COTS' interest and commitment to providing services to North Quarry Apartments NPLH residents.

### Conceptual Site Plan, Development Size and Density

Below is a conceptual site plan for North Quarry Apartments (a.k.a. Quarry Heights). Caulfield Lane is the unlabeled road on the left side of the image. The three-story buildings are approximately 41' in height.



### Unit Configuration and Size

The 15 one-bedroom units range from 540 - 588 sq.ft.; the 20 two-bedrooms from 827 – 987 sq.ft. and the 15 three-bedrooms, 1,033 – 1,073 sq.ft.

### Property Description

There are no existing structures on the 3.47 acre site (which will be reduced to a 1.8 acre site after dedications back to the City for roads, river setbacks and an extended bike path). It was previously used as a staging ground for the now discontinued quarry operations. See attachment H for additional drawings.

### State of California Climate Initiatives and Green Building Methods

Burbank pledges participation in and conform to the State of California Climate Initiatives. At a minimum, the project will achieve certification in Green Point rating. As part of that effort, the project will be 100% electric with a portion of the use offset by planned roof mounted photovoltaic energy generation. Additionally, state of the art heat pump hot water heating is planned.



## Community Support and Engagement

### **Experience with Community Outreach**

Burbank staff has substantial demonstrated qualifications in public involvement of its projects. Methods include planning and strategy meetings, neighborhood outreach, neighborhood meetings/forums, and detailed responses to address all community concerns.

### **Planning and Entitlement Processing, Hearings, and Procedures**

Burbank coordinates all project planning approvals through the municipal planning department. Early in each project, meetings with municipal staff determine the required and suggested steps in the approval process. Burbank often chooses to seek greater public noticing of projects and typically exceeds the required number of neighborhood meetings or public hearings. If a public notice is typically sent to neighbors within 300 feet, Burbank will request notification to a broader area such as 500 feet or greater. This helps to ensure that all community members have been properly informed and are given a chance to view the project proposal and comment on the plans. Additionally, if federal funds are utilized there is required public noticing of the project and publication of these notices in the local press. Burbank's policy is to take the high ground and default to a higher level of noticing and community involvement.

The North Quarry site has received full entitlements through the SB-35 ministerial approval process. Though no public hearings are required under SB-35, Burbank offered to and met with the Petaluma Plan Commission and received useful feedback on the plans and elevations. The addition of NPLH units is an acknowledgment that additional meetings with the community will be forthcoming to address any concerns they may have.

### **Community Outreach and Acceptance Plan**

Burbank knows from experience that community support and participation are essential to the successful development of affordable housing. The engagement of community and neighborhood stakeholders in the development process produces a greater sensitivity to the concerns of the surrounding community, a sense of ownership among participants, and an established base of political support. Successful community engagement, however, requires planning and execution.

Burbank's plan for community involvement and acceptance will undertake the following.

#### **Identify community residents, merchants, and other stakeholders**

We will identify community and neighborhood stakeholders through the following means:

- a. Consult with City staff to identify key stakeholders and interested parties in the neighborhood.
- b. Interview key neighborhood residents, developers, activists, merchants, and service providers to help us identify all community stakeholders and constituencies, who will be contacted as part of our community outreach plan.
- c. Consult with local community-based agency staff to identify those interested in the project, including neighbors and other interested parties.

- d. Contact and meet with nearby property owners as to site design and potential impacts and strive to incorporate their input into the project.
- e. Conduct extensive research, conduct interviews, and attend community meetings to better understand the community context and to direct our future community outreach efforts, all of which will inform our final project design.
- f. Distribute mailings to neighborhood residents: send out mailings to residents within the surrounding neighborhood to introduce ourselves, summarize the development program, and invite participation in community workshops and open house events.

### **Engage Stakeholders in the Design and Development Process**

After identifying community stakeholders, we will organize community workshops/open house meetings to solicit input for the proposed project and establish means for ongoing communication.

- a. The community will be given the opportunity to provide focused input at several critical points in the design process through community workshop/open house events. These events will be held at convenient locations and times for all neighbors, property owners, and community stakeholders to review conceptual designs, and provide feedback to Burbank. The workshops will be noticed through neighborhood mailings to ensure broader involvement.
- b. During the design process and community workshops, the design team will attend all meetings to present the proposed project, discuss community concerns and design issues, and receive input.
- c. Burbank will incorporate community design input into our proposal and suggestions for connecting the residents to the surrounding neighborhood.
- d. Burbank will create an e-mail distribution list and mailing list to provide interested community members and groups with periodic updates and announcements of project meetings.

### **Ongoing Outreach**

Burbank will continue these outreach efforts throughout the development process. We will schedule regular correspondence to the neighborhood and broader community regarding the development progress on the project. When in construction, Burbank will maintain close contact with the neighborhood to ensure that all construction activity will be carried out with minimal disturbance to the surrounding neighbors. Burbank will accomplish this through e-mail lists, direct mailings, phone calls to immediate neighbors as needed, and publication in the local press, as needed.

The culmination of Burbank's outreach program will be a new affordable development on the site that fits harmoniously into the existing neighborhood and relates well to its neighbors.

### **Community Outreach in Marketing of New Rental Apartment Units**

When the project is in construction and nearing completion, staff or contractors of Burbank Housing Management Corporation (BHMC) will begin the rent-up outreach and rent-up activities. BHMC has over twenty-five years of substantial experience in public outreach for its developments. Outreach begins with

development of a marketing plan in accordance with local, state, and federal requirements applicable to the project.

#### Time Line-Proposed Strategy to Secure Awards

November 2020	NOFA for NPLH released
January 2021	Second round of 4%/State Tax Credit Applications Due
February 2021	NPLH 3 applications due
April 2021	Second round awards likely announced
May 2021	NPLH 3 awards announced
Summer 2021	Completion of Drawings, permits and move toward closing
October 2021	Closing and Construction start
January 2022	Substantial completion and initial occupancy

#### Project Financial Model

Please see Attachment A for a full financial *pro forma* including operations and also Section 3 “Financing Plan” for more details of this tax credit and NPLH funded proposal.

#### Property Management Goals and Approach

1. Maintain the social livability of its properties through a high level of on-site management including staff training and accountability, and clear communication to tenants of expectations for appropriate and courteous social interaction.
2. Provide for physical maintenance of the properties through regular inspections, prompt response to emergency repair needs, and a systematic program of regular maintenance performed in accordance with long-term physical needs assessments.
3. Assure financial performance through accurate property budgets and financial reporting, development of financial strategies for each property, and adequate staff resources to follow through on financial planning.
4. Maintain a low level of unit vacancy through providing suitable conditions at properties, understanding of rents in relation to the market, efficient physical turnover of units, maintenance of up to date waiting lists, establishment of an outreach and advertising policy, and staff accountability for filling vacancies.
5. Commit to a rent level policy which raises rents to regulatory or market determined maximum levels at properties that have not been able to meet their own financial needs or which carry debt owed to Burbank Housing. This policy would not apply to properties which have performed adequately and which are not indebted to Burbank Housing.
6. Assure adequate maintenance reserves through realistic initial budgeting with adjustments made over time in accordance with property specific replacement needs analyses. Replacement reserve requirements generally will need to increase as properties age.
7. Continue to provide for service coordination and community enrichment efforts through maintenance of the service coordination program and staff, and seek to supplement resources for this effort through solicitation of grant income.



8. Meet and exceed local, state and federal Fair Housing requirements and affirmatively and assertively market rental communities to disadvantaged social-economic communities.

### Lead Service Provider Approach

Sonoma County Behavioral Health provides extensive and varied services to residents with a severe and persistent mental illness and works collaboratively with a host of public and non-profit partners and stakeholders to achieve fully integrated service delivery. Services are client- and family-centered and culturally competent. The focus of service delivery is wellness, recovery and resiliency.

See Attachment B: Caritas Supportive Services Plan with budgets to see how Behavioral Health will deliver services to NPLH residents.

### 3. Financing Plan

As detailed in Attachment A: Financial Pro Forma, North Quarry Apartments is proposed as a 50-unit development with a mix of one-, two- and three-bedroom units. Most of the one-bedroom units will be designated for NPLH residents. The proposed funding sources are primarily 4% federal tax credits plus State tax credits (a program that should generate around 60% of the development cost), HCD programs including NPLH and possibly Infill Infrastructure Grants (IIG), Tax Exempt Bond financing tied to the receipt of the 4% credits, and gap funds from the City of Petaluma, the Capital Impact Fund and Deferred Development Fee. As noted earlier in the timeline, the awards should come in around the time of the review of the second round of the TCAC/CDLAC reviews. Additional funds are being generated through the twelve Project Based Vouchers to increase the loan amount by subsidizing the NPLH units up to 110% of Fair Market Value. The initial plan for the site included donated land plus certain in lieu fees tied to projects proposed near Petaluma's SMART stations. Those projects are uncertain and the model proposed does not include the specified donations.

The projected hard and soft costs are tied not only to Burbank's long experience with pricing such costs, but also utilizing the direct recent experience with same architect and contract regarding the Stoddard Apartments in Napa plus a review of plans by Midstate Construction including some of the extraordinary costs related to the site development. The project will also incur labor costs tied to state and federal prevailing wage costs. Midstate's estimate is included in this proposal as Attachment F. Also included is a prior submitted bank letter offering construction and permanent loan terms and estimated pricing at that time. See Attachment G. The letter was procured for a recent 9% Disaster Tax Credit application that did not include bond financing. A letter may be generated upon request for this financial structure.

### 4. Project Affordability

Unit Type	20% AMI	50% AMI	60% AMI	Manager	Totals
One-bedroom	12		3		15
Two-bedroom		3	16	1	20
Three-bedroom			15		15
Totals	12	3	34	1	50

Average affordability for the 49 rent-restricted units is 49.6% AMI.

## 5. Organizational Information

### Organizational Summary

Burbank Housing Development Corporation, a Sonoma County-based 501(c)(3) non-profit California Corporation, is in its 40<sup>th</sup> year of developing affordable rental and ownership housing in Northern California. The agency has developed nearly 4,000 total units and currently has two No Place Like Home projects in predevelopment, a 64-unit new construction project in Santa Rosa, Sonoma County, and a 66-unit adaptive reuse project in the City of Napa, Napa County.

Burbank seeks to continue its development of more homeless-dedicated housing and No Place Like Home supported housing in particular.

### Point of Contact

Rich Wallach, Director of Housing Development  
Burbank Housing Development Corporation  
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Office: (707) 303-1006  
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Web address: <https://www.burbankhousing.org/>

### Developer Experience

Burbank Housing is a community-based nonprofit affordable housing organization providing housing development, ownership, and management services in the North Bay. Since 1980, Burbank has developed or acquired nearly 100 projects, which includes about 4,000 rental and ownership units with an additional 500+ units currently in construction and predevelopment stages.

We work in collaboration with other smaller community organizations to build development capacity, and with service organizations to provide supportive housing for people with special needs. We enter into joint ventures or other forms of partnerships for development purposes when that approach is the most effective.

Burbank Housing Management Corporation (BHMC) was founded in 1994 to provide property management services to rental properties developed by Burbank Housing Development Corporation and later, to provide fee-for-services management for non-Burbank properties.

Our property management meets the highest standards for physical maintenance, creation of community, and compliance with program policies and guidelines. We create communities that are carefully designed, intentional, inspiring, beautiful and well managed, in addition to meeting the needs for affordable housing. Our housing exhibits excellent standards for efficiency and quality, promoting safe and healthy living environments. Burbank communities contribute significantly to the local economy. New developments are creating and retaining jobs related to construction. Existing properties utilize many business resources and create jobs in property management, and maintenance.

## Vision Statement

This Vision comes from our experience and embodies our goals for the future. We are proud of our past accomplishments, and seek to create a vision to guide the future of Burbank. We create, maintain and manage well-designed housing in livable communities. Our ambition is to address the unmet housing needs throughout the California region North of San Francisco, and to improve the economic condition of the households we serve by providing affordable homes.

Burbank has received numerous awards and acknowledgements for our affordable housing work, see Attachment E: Burbank Awards and Acknowledgements for examples.

## Our Housing

Burbank's housing is a safe, decent and good place to live. We create communities that are carefully designed, intentional, inspiring, beautiful and well managed, in addition to meeting the needs for affordable housing. Our housing exhibits excellent standards for efficiency and quality, promoting safe and healthy living environments. Our property management meets the highest standards for physical maintenance, creation of community, and compliance with program policies and guidelines. We address a broad range of housing needs, including housing for homeless people, rental housing for families and special needs groups, and homeowner opportunities.

See Attachment D: Burbank Property Examples for photographs of representative examples of Burbank housing.

## Rental Housing Types and Development Objectives

Burbank Housing develops and manages a wide variety of rental housing types.

- Family rental housing is housing available to all low-income people. These are usually larger new construction projects consisting of at least 40 units. They are intended to meet a range of incomes with various rent tiers from affordability at 20% of median income up to 80% of median income.
- Acquisition and rehabilitation of existing housing is a strategy used to create, preserve and improve affordable housing. Burbank has acquired existing rental housing for a variety of reasons, including preservation of existing affordable programs in housing being sold by private investors; the creation of supportive housing for tenants with special needs, and the rehabilitation of blighted housing.
- Special needs housing, available to people with disabilities and other identified groups, such as seniors, homeless persons and farm workers, is another objective of Burbank's work. To the extent that this housing is supportive housing where services are provided, Burbank collaborates with other agencies that provide the services component. Special needs housing can be developed as a separate project or integrated into larger rental developments.

## Goals for Property Management

Burbank Housing seeks to maintain a good social environment along with adequate property maintenance where people feel they have an attractive, orderly and encouraging place to live. Burbank will also operate its properties in a fiscally sound and responsible manner to assure that properties can meet their financial expectations and foster the understanding that Burbank Housing Management Corporation's financial well-being rests on the financial performance of the properties.

## Homeless-Dedicated and Permanent Supported Housing Experience

### Summary of Special Needs Housing Experience

Burbank Housing routinely develops special needs affordable rental housing including housing for farmworkers, homeless households, seniors, foster youth, HIV+ individuals, domestic abuse victims, and people with physical or psychiatric disability. Occasionally, we develop rental communities that are 100% special needs but more frequently, we develop communities with set-aside units for special needs individuals and households connected to a local service provider. Twenty of our nearly 70 rental communities provide set-asides totaling 338 units supported by over a dozen service provider partners.

Burbank Housing has completed several rental projects that provide housing for formerly homeless people with services offered by a mental health service provider. These are discussed project-by-project below.

**Vida Nueva:** Located in the City of Rohnert Park, Sonoma County, and completed in 2008, this 24-unit 100% permanent supported housing complex provides affordable housing and supportive services to homeless people, including those with ongoing disabilities. The project primarily serves families, the majority of which headed by a single parent. For a majority of the households, one adult member will have one or more disabilities, such as a chemical dependency, mental illness or a physical disability.

**Fife Creek Commons:** Located in Guerneville, unincorporated Sonoma County, this 2012 project provides 48 units of affordable rental housing, 24 of which are set-aside for various special needs populations. Eight of these set-asides are Mental Health Services Act (MHSA) units for people with severe and persistent mental illness, clients of Sonoma County Behavioral Health. This was made possible through a \$1,000,000 MHSA award to the capital development budget. Twelve additional units are set-aside for formerly homeless people with disabilities who are eligible for services from West County Community Services. Finally, four more units are set-aside for very low-income people that are HIV+ and clients of a community-based HIV+ service provider, Face to Face.

**Windsor Redwoods:** Located in the Town of Windsor, Sonoma County, this rental community, completed in 2011, provides 65 units of affordable rental housing. Eight of these homes are set-aside as MHSA units for clients of Sonoma County Behavioral Health. These eight units serve individuals in households that are formerly homeless or at risk of homelessness in addition to possessing a severe and persistent mental illness. Like Fife Creek Commons, Windsor Redwoods received \$1,000,000 in MHSA funding for capital development purposes.

### Two Current No Place Like Home Projects in Predevelopment

Burbank is currently working on two NPLH projects in the predevelopment stage, both of which were awarded funds in Round 1 (2019) of the NPLH competitive funding.

**Heritage House:** This is a rehabilitation project in the City of Napa, Napa County, in which Burbank Housing will convert a former assisted living facility into 33 units of homeless-dedicated housing (32 No Place Like Home units) and 32 units rent-restricted for low income households, plus one resident manager's unit for a total of 66 units. All units will be either studios or one-bedroom apartments. Burbank Housing is partnering with the Gasser Foundation and Abode Services. The Gasser Foundation will contribute the land and building to the project while Abode Services will be the on-site service provider at Heritage House. The total development cost of Heritage House is \$38 million, which includes the cost of providing supportive services to the formerly homeless residents for a period of 20 years.

These services include case management, financial literacy, life skills training, job counseling and placement, mental health services, and substance abuse recovery. Funding sources for the development of Heritage House include the No Place Like Home Program, Low Income Housing Tax Credits, the City of Napa, the County of Napa, the Gasser Foundation, and 38 project-based Housing Choice Vouchers (Section 8) vouchers from the Napa Housing Authority. CEQA and all land use entitlements have been approved by the City Council and construction is slated to begin in late 2020 or early 2021.

**Caritas Homes, Phase 1:** This project is one of three elements of a larger urban redevelopment project know as Caritas Village and is being developed in partnership with the landowner, Catholic Charities of Santa Rosa. The site is an entire city block in downtown Santa Rosa where Charities has been operating a homeless shelter and other homeless services for 30 years. The site is now being redeveloped into Caritas Center, an expanded homeless shelter and homeless services center replacing old and dilapidated buildings, Caritas Homes, Phase 1, and Caritas Homes, Phase 2. Burbank is the lead developer of the Caritas Homes, Phase 1, where 30 of the 64 units are No Place Like Home dedicated units, 33 are rent restricted at 50% and 60% of Area Median Income, plus one manager's unit. Land use entitlements have been approved by the City Council and construction is slated to begin in 2021. Secured funding to-date includes No Place Like Home funding and multiple awards from the County of Sonoma including \$1,000,000 passed through from the Partnership HealthPlan of California. Apple Corporation has committed a \$2.9M construction-to-permanent loan. Burbank submitted for disaster 9% tax credits in July 2020 and preliminary scoring is favorable. A funding application is being submitted to State HCD on July 30, 2020 for Transit-Oriented Development (TOD) program funds. Prospective funding includes Community Development Block Grant- Disaster Recovery funds, the San Francisco Home Loan Bank Affordable Housing Program, City of Santa Rosa funding and possibly other state programs, if needed.

## 6. Qualifications

### Lead Staff

If Burbank Housing is selected as developer, Mark Krug, Business Development Manager, will be the principal point person assigned because of his extensive experience in homeless services, policy and housing. Mark is the project manager for Caritas Homes, Phase 1, described above. He has worked as senior staff on homeless issues in Sonoma County for 26 of the last 30 years. He served as Executive Director of Community Support Network in the early 90's, a non-profit, community-based agency that provides services and housing to homeless adults with serious and persistent mental illness and substance abuse and as a division manager with both the City of Santa Rosa and the County of Sonoma with oversight responsibilities for all homeless funding, policy and initiatives. When the Sonoma County Continuum of Care organization organized its first governing board in 2007/2008, Mark was elected as the first chair and reelected for a second term. He then joined Burbank Housing and currently serves as the Vice-Chair of HOME Sonoma County, the Continuum of Care board re-organized in late 2018 with local elected officials making up the board majority and with an expanded funding purview.

As indicated in the staff resume summaries section later on, Burbank has a strong and extremely experienced senior and executive staff to assure another successful NPLH project in Sonoma County. While Mark will be the point person, we believe the breadth and depth of Burbank's staff is the primary strength of this RFP response.

## References

### **Jeff Bennett**

Senior Vice President  
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### **David Gouin**

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### **Tim McCann**- Tax Credit Equity Partner

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## Key Staff

Burbank's senior staff each have extensive experience in aspects of affordable housing development and management. A summary of their resumes follows:



### **Larry Florin, Chief Executive Officer**

Larry brings over thirty years' experience in real estate, community and economic development in both the public and private sector to Burbank Housing. Most recently Larry served as the Director of Housing and Intergovernmental Affairs for Napa County. He managed Napa County's affordable housing programs as well as the county's Housing Authority and community and economic development activities. Prior to joining Napa County Larry spent over ten years in the private sector, co-founding a development company specializing in adaptive reuse of underutilized industrial property and overseeing some of the company's largest development projects in the San Francisco Bay Area including the redevelopment of the Hunters Point Naval Shipyard and Treasure Island. While in the Northeast Mr. Florin oversaw a 2,000-unit urban mixed use development project along the Hudson River across from Midtown Manhattan.

He has over 15 years' experience working in senior management positions in San Francisco including executive level positions in the Mayor's Office, Redevelopment Authority and Port. He also served as the first Executive Director of the Treasure Island Development Authority. Throughout the years, Larry has served on the Executive Board of the Association of Bay Area Governments, the Governor's Task Force on Military Base Conversion, the State of California Housing Element Working Group and California Forward's One Million Homes Initiative. He has received the San Francisco Business Times Real Estate Transaction of the Year Award and the San Francisco Mayors Manager of the Year. Larry has a Master in Urban Planning from the University of Pennsylvania and a Bachelor of Science in Economics from Purchase State College.





**RICH WALLACH, Director of Housing Development**

Rich joined Burbank Housing in 2019 and brings with him over 35 years of community development experience in for-profit, nonprofit and public sector areas of real estate and urban redevelopment. He is a LEED accredited professional and holds an MBA degree from the Kellogg Graduate School of Management at Northwestern University with concentrations in marketing, finance and strategy. Rich most recently did work for Tenderloin Neighborhood Development Corporation in San Francisco as a project management consultant. Prior to that he worked in Chicago for many years building and financing affordable housing.



**ANNIE MCNEANY, Director of Property Management**

Annie has directed property management for Burbank Housing since 2005. She joined Burbank Housing in 1996, first in compliance administration and then as a regional property manager before serving as the Assistant Director of Property Management.

As Director of Property Management, Annie oversees all of the activities of Burbank Housing Management Corporation, which includes a property portfolio of nearly 2,962 units in over 61 developments in Sonoma and Napa counties. She directs a staff of more than 130 employees in regional property management, facilities, maintenance and janitorial, and compliance admin.



**LARRY BOUGHTON, Construction General Manager**

Larry manages Burbank Housing's construction department. He came to Burbank Housing as a construction project manager in 1995 with a 13-year background in all phases of construction, and is a licensed general contractor.

As construction general manager, Larry oversees construction management and processes. He is responsible for construction department staff in office and on-site. On projects built by Burbank Housing directly, he is responsible for budgeting, cost tracking, and quality control. Larry manages a staff of fifteen in construction management and site staff.



**JEFF MOLINE, Chief Financial Officer**

Jeff joined Burbank Housing as the CFO/Controller in September 2017. Prior to this position Jeff was the Corporate Controller for East Bay Asian Local Development Corporation in Oakland, CA. Jeff has also held Assistant Controller positions and practiced public accounting 6 years. He is responsible for accounting, financial reporting, fiscal management, and strategic planning for Burbank Housing. He is a Certified Public Accountant (CPA) in the State of California and a Certified Valuation Analyst (CVA) with a background in valuations of general and limited partner interests of affordable housing partnerships. Jeff received his degree in business from the University of South Dakota



**LAUREN TAYLOR, Director of Tenant Services**

Lauren joined Burbank Housing in the Fall of 2017 to develop our Resident Services Department. Prior to joining Burbank, Lauren led a leadership development program called Tomorrow's Leaders Today. Lauren received her BA from Northeastern University where she double-majored in Human Services & International Affairs. Most notable is Lauren's past experience developing and evaluating programs as well as the strong working relationships she has with leading service agencies. Lauren is on the Board of Directors for Children's Humanitarian International, is a graduate of the Santa Rosa Metro Chamber's Leadership Santa Rosa Program and on the Executive Leadership Team of the American Heart Association, North Bay.



**MARK KRUG, Business Development Manager**

With 22 years' previous experience in affordable housing, Mark joined the Burbank staff in April 2015. Mark first began working in affordable housing in 1990 as Executive Director of Community Support Network, a Sonoma County non-profit agency providing housing and support services for mentally ill homeless adults. Since then, Mark has worked as a Senior Housing Development Officer for the Colorado Housing and Finance Authority and as a senior manager with responsibilities in affordable housing programs and homeless services policy for both the City of Santa Rosa and the County of Sonoma. Mark is currently the Vice-Chair for HOME Sonoma County, the Continuum of Care homeless services governing board.

## Development Team

**Architect:** Dahlin Group Inc., 5865 Owens Drive, Pleasanton, CA 94588, Chris Apostolopoulos, (925) 251-7200, [chris.apostolopoulos@dahlingroup.com](mailto:chris.apostolopoulos@dahlingroup.com)

**General Contractor:** Midstate Construction Inc., 1180 Holm Road, Petaluma, CA 94954, Patrick Draeger, (707) 559-2325, [patd@midstateconstruction.com](mailto:patd@midstateconstruction.com)

**Attorney:** Gubb & Barshay LLP, 505 14<sup>th</sup> Street, Suite 100, Oakland, CA 94612, Scott Barshay, (415) 781-6600, [sbarshay@gubbandbarshay.com](mailto:sbarshay@gubbandbarshay.com)

**Financial Consultant:** California Housing Partnership Corporation, 369 Pine Street, San Francisco, CA 94104, Claire Parisa, (415) 433-6804, [cparisa@chpc.net](mailto:cparisa@chpc.net)

**Market Analyst:** Laurin Associates, 151 Sports Drive, Suite A, Sacramento, CA 95834, Stefanie Williams, (916) 372-6100, [swilliams@laurinassociates.com](mailto:swilliams@laurinassociates.com)

**Energy Consultant:** Gilleran Energy Management Inc., 750A Davis Street, Santa Rosa, CA 95401, (707) 528-7318, [Kevin@Gilleranenergy.com](mailto:Kevin@Gilleranenergy.com)

**Property Management:** Burbank Housing Management Corporation, 790 Sonoma Avenue, Santa Rosa, CA 95404, Annie McNeany, (707) 303-1026, [amcneany@burbankhousing.org](mailto:amcneany@burbankhousing.org)

## Debarment or Disqualifications

Burbank Housing does not have any disbarments or disqualifications.

## 7. Disclosure of Ongoing Litigation

### **Catalina Townhomes Claim.**

Catalina Townhomes is an affordable homeownership project completed by Burbank in 2017. On May 22, 2020, the Association filed a one-count Complaint in Sonoma County Superior Court. The Complaint alleges various construction defects in all phases of construction encompassed by almost every residential building standard listed in Civil Code §§ 896 and 897 (e.g., water intrusion, structural, soils, plumbing, electrical, hardscape, stucco and siding, various manufactured products, heating, roofing, and miscellaneous defects). The Association also alleges that the residents will have to be relocated while these alleged defects are repaired.

The experts retained by Burbank Housing Development Corporation have investigated the project and issued estimated costs to repair alleged defects at \$678,820.00.

### **Conclusion**

It is our opinion that any amounts spent to settle this claim will be covered by the insurance, except the SIR amount of \$25,000 (which has already been expended). We do not believe this claim will have a material impact on the financial viability of Burbank Housing Development Corporation or its Affiliates or development projects.