



DALY CITY HOUSING DEVELOPMENT FINANCE AGENCY

AGENDA

SPECIAL MEETING

**City of Daly City – City Hall
Council Chambers
333 – 90th Street, 2nd Floor, Daly City, CA 94015**

Special Meeting - HOUSING DEVELOPMENT FINANCE AGENCY

AGENDA

Monday, September 8, 2025 - 7:00 PM

**City Hall Council Chambers – 2nd Floor
City Hall 333 – 90th Street
Daly City, CA 94015**

To watch the live telecast:

**<https://www.youtube.com/@DalyCityGov/streams>
<https://www.dalycity.org/agendas> or Comcast Channel 27**

PUBLIC PARTICIPATION

To submit a comment in writing, please email cityclerk@dalycity.org and write “Public Comment” in the subject line. In the body of the email, include the item number and/or title of the item as well as your comments. All comments received by 4:00 pm will be emailed to the Housing Development Finance Agency members and included as an “Add to Packet” on the City’s website prior to the meeting. Those comments received after 4:00 pm will be added to the record and shared with the Housing Development Finance Agency members following the public meeting. Comments are not read aloud into the record.

AVAILABILITY OF PUBLIC RECORDS:

All public record to an open session item on this agenda, which are not exempt from disclosure pursuant to the California Public Records Act, that are distributed to a majority of the legislative body will be available for public inspection at the City Clerk’s Office, City Hall located at 333 90th Street, Daly City, CA during normal business hours, at the same time that the public records are distributed or made available to the legislative body.

Persons with disabilities who require auxiliary aids or services in attending or participating in this meeting should call the office of the City Clerk at 991-8078 as soon as possible.

CALL TO ORDER:

ROLL CALL:

CONSENT AGENDA

All items listed on the Consent Agenda are considered to be routine and may be approved by one roll call vote of the City Council. There shall be no separate discussion of the matters on the Consent Agenda unless requested by a member of the City Council. If discussion is required, that item will be removed from the Consent Agenda and will be considered separately at the end of the Agenda.

COMMUNICATION

1. Developer Interviews for 12.5-Acre Site Located at Carter/Martin Housing Successor Parcel at Carter and Martin Streets

ADJOURNMENT:



Daly City Housing Development – Finance AgencyItem

September 8, 2025

SUBJECT: Developer Interviews for 12.5-Acre Site Located at Carter/Martin Housing Successor Parcel at Carter and Martin Streets

RECOMMENDED ACTION

Conduct interviews with developers interested in acquisition and affordable housing development at the Carter/Martin property.

BACKGROUND

With the dissolution of Redevelopment in California in 2012, a 12.5 Acre site owned by the Daly City Redevelopment Agency was transferred to the Daly City Housing Development Finance Agency (Housing Successor to the Redevelopment Agency) for the purpose of affordable housing. On July 22, 2019 the DCHDFA Board authorized staff to request qualifications from developers with an interest in developing the site. That process resulted in an Exclusive Right to Negotiate (ENA) with Bridge Housing. The ENA with Bridge expired and they did not seek to renew it. The DCHDFA re-issued a Request for Qualifications (RFQ) on July 25, 2025 for the development of the Carter/Martin property pursuant to exemptions under the California Surplus Land Act (Gov. Code § 54220 et seq.) and the Surplus Land Act Guidelines (25 CCR § 100 et seq.). The RFQ is attached as Exhibit C to this report. This RFQ differs from the one issued in 2019 in that it does not require a master planning process with the neighboring parcels of the Cow Palace and the site owned by Syufy Enterprises which was recently entitled as a battery storage site.

Staff compiled a distribution list for the RFQ and circulated it to about 170 individuals representing more than 30 prospective developers. The SOQs were due on August 25, 2025 and staff received two Statements of Qualifications (SOQ) from the following:

1. ALegacy LLC
2. HumanGood Affordable Housing (HGAH), Waterford Property Company, and HKIT Architects

DISCUSSION

According to the developer selection schedule established by the Agency Board, a special Agency meeting will take place on September 8, 2025 for developer interviews.

Following is a suggested structure for the developer interviews:

- Staff introduction
- Each developer will have an opportunity to give a 10-minute presentation about their team and approach to development of the subject property.

September 8, 2025

Carter/Martin Housing Successor Land Developer Interviews

Page 2 of 2

- Following each developer presentation, the Agency Board will ask six standard questions. The suggested questions are attached to this memo
- Closing comments by the Agency Board

Under the developer selection schedule outlined in the RFQ, the Agency Board will reconvene on September 22 to select a developer, and an Exclusive Right to Negotiate with selected developer will be considered on October 14.

The following exhibits are attached:

- Exhibit A provides a list of proposed developer interview questions
- Exhibit B provides a brief summary of the developer SOQs
- Exhibit C is the RFQ
- Exhibit D is the SOQ from Alegacy LLC
- Exhibit E is the SOQ from the team of HGAH, Waterford Property Company and HKIT Architects.

Respectfully submitted,



Lenelle Suliguin
Housing and Community
Development Manager



Tatum Mothershead
Economic and Community
Development Director

EXHIBT A – Proposed Developer interview questions

1. What do you see as the biggest challenge in developing this site and how will you address it?
2. What is your financial plan for this project? What will be the key financial resources used to finance your project and is this financial plan consistent with the time frame included in your proposal? Do you foresee any project delays due to funding shortfalls or access to capital? Is your financial plan reliant on Federal sources which might not be available in the next few years?
3. Describe how your team will work with the Daly City Community and the benefits your project will bring to the larger Bayshore neighborhood. Please describe your neighborhood outreach plan.
4. Describe your experience in developing affordable housing?
5. Can you describe in one or two sentences your vision for this project?

EXHIBIT B – Summary of Developer Qualification Statements

Developer	Experience in Affordable Housing Development	Development Concept	Access to Financial Capital
ALegacy LLC	This project would represent ALegacy's first experience with affordable housing developer. ALegacy has extensive experience in project finance, clean energy and complex site development.	A mixed-use development consisting of at least 400 units of 100% affordable housing, retail (grocery store, food services) green spaces, parking garage.	ALegacy is structuring a capital plan anchored by approximately 30% equity and 70% debt.
HumanGood Affordable Housing, Waterford Property Company, HKIT Architects	-Beacon Development Group (BDG), HGAH's development arm, has over 25 years of experience in affordable housing development in California, Oregon and Washington. -Waterford Property Company was founded in 2014 and has acquired and developed over \$4 billion in real estate assets, including 7,384 multifamily units.	A mixed-use development consisting of 75 affordable senior housing apartments to be developed by BDG/HGAH, 125 market rate multifamily apartments to be developed by Waterford, and a PACE (Program for All-Inclusive Care for the Elderly) Center.	HGAH and Waterford maintain strong relationships with lenders, investors, and public agencies.

EXHIBIT C



Daly City Housing Development Finance Agency

Request for Developer Qualifications

Carter/Martin Site Development Opportunity

RFQ Issued – Friday, July 25, 2025
Deadline to Submit – Monday, August 25, 2025 by 5:00 PM PST

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DEADLINE FOR SUBMITTAL: Monday, August 25, 2025 at 5:00 PM PST

1. Introduction and Background

Project Objective

Through this RFQ process, the Daly City Housing Development Finance Agency (DCHDFA) intends to select a developer to develop a combined high/medium density residential development that is affordable to various income levels on an approximately 12.5 acre site in the Bayshore neighborhood of Daly City. The Site is adjacent to two parcels, one is the Cow Palace which is owned by the State of California and the other is owned by Syufy Properties. The Agency intends to market the Carter/Martin Site pursuant to exemptions under the California Surplus Land Act (Gov. Code § 54220 et seq.) and the Surplus Land Act Guidelines (25 CCR § 100 et seq.). The Site has been, or will be, designated as 'exempt surplus land' pursuant to Section 54221(f) of the Government Code, and is being marketed in accordance with exemptions available for:

- (1) residential developments of 100 or more units with a minimum of 25% restricted to lower-income households as provided in 25 CCR § 103(b)(3); or
- (2) mixed-use developments with 100% of units affordable to low or moderate income, with 75% for lower-income households, under 25 CCR § 103(c)(7)(A).

The Agency reserves the right to pursue any other applicable exemptions consistent with the statute or HCD guidelines, including those related to conveyances to housing successor agencies, public agency transfers, or project-specific affordability covenants.

The Agency invites experienced developers to submit qualifications for the development of the Carter/Martin Site further described below.

Overview of Site

The development opportunity is located in the northeast corner of Daly City in the Bayshore neighborhood. It is an irregular site bounded by Carter Street to the west and Martin Street to the south. The Site is comprised of two parcels (APN: 005-050-240 and 005-380-020). It is currently zoned C-1 and is owned by DCHDFA, the Successor Agency to the former Redevelopment Agency of the City of Daly City. As such, the site is a housing asset with affordability restrictions mandating income-targeting requirements that applied under Community Redevelopment Law.

As previously mentioned, the site is adjacent to the 77.5 acre Cow Palace owned by the State of California and the 11.16 acre property owned by Syufy Enterprises. The Syufy-owned parcel was recently approved for the construction of a battery energy storage system. The site is undeveloped and has relatively steep topography in portions with dense vegetation. Potential Site constraints requiring further investigation, but are not limited to include: wetlands, habitat

areas, endangered species, soils and geotechnical, non-engineered fill, utility capacity, and hazardous materials and toxics.

Located immediately south of San Francisco in San Mateo County, Daly City is a well-educated and community of approximately 105,000 residents with accessibility to the I-280 and U.S. Route 101 freeways. The Bayshore neighborhood is part of the Bayshore Basin, a drainage basin bounded by San Bruno Mountain to the west and south, and to the north by San Francisco, and to the east by San Francisco Bay.

Overview of Development Opportunities

The Agency desires that the selected developer(s) take into account the following considerations:

1. The development should involve community outreach, involvement, input, and have community support
2. The development must exemplify attractive architecture and sustainable design and construction, as well as coordination and efficient utilization of the site in relation to the adjacent parcels. Shortlisted developers will have the opportunity to meet directly with staff to exchange priorities and details about the expected design, quality, and mix of the development as well as proposed offsite improvements that may impact this project. These priorities will ultimately need to be considered and as part of the financial pro forma, valuation estimates, financial returns, and estimates of project fiscal impacts that serve as the basis for an eventual Letter of Intent ("LOI").
3. The development should provide vehicle and pedestrian connectivity.
4. Conveyance of the property will be subject to receipt of all entitlements, permits, and construction financing is in place, which may be agreed upon in an approved DDA.

Copies of a Regional Map and Site Aerial are provided on the following pages.

Figure 1: Regional Map and Demographics

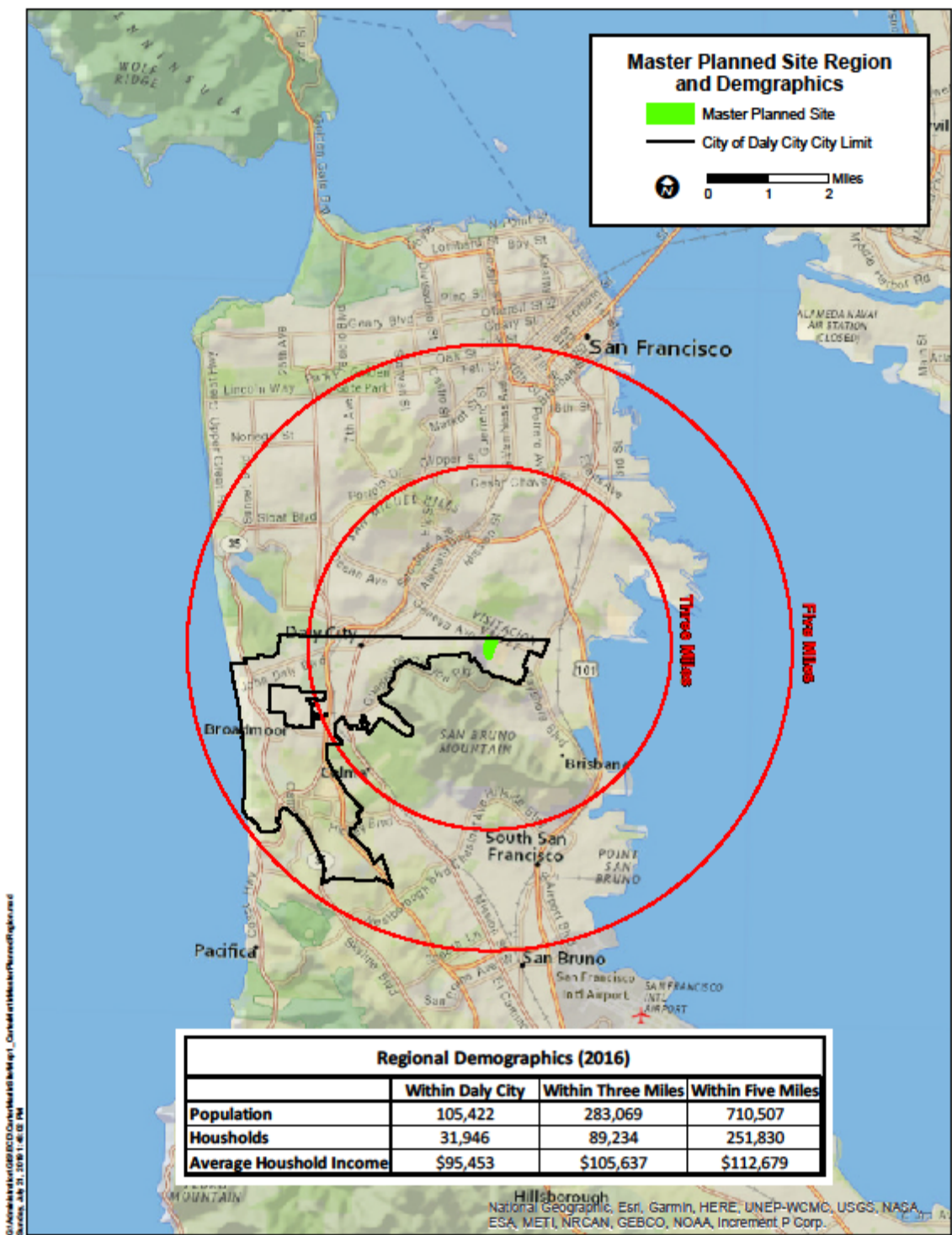
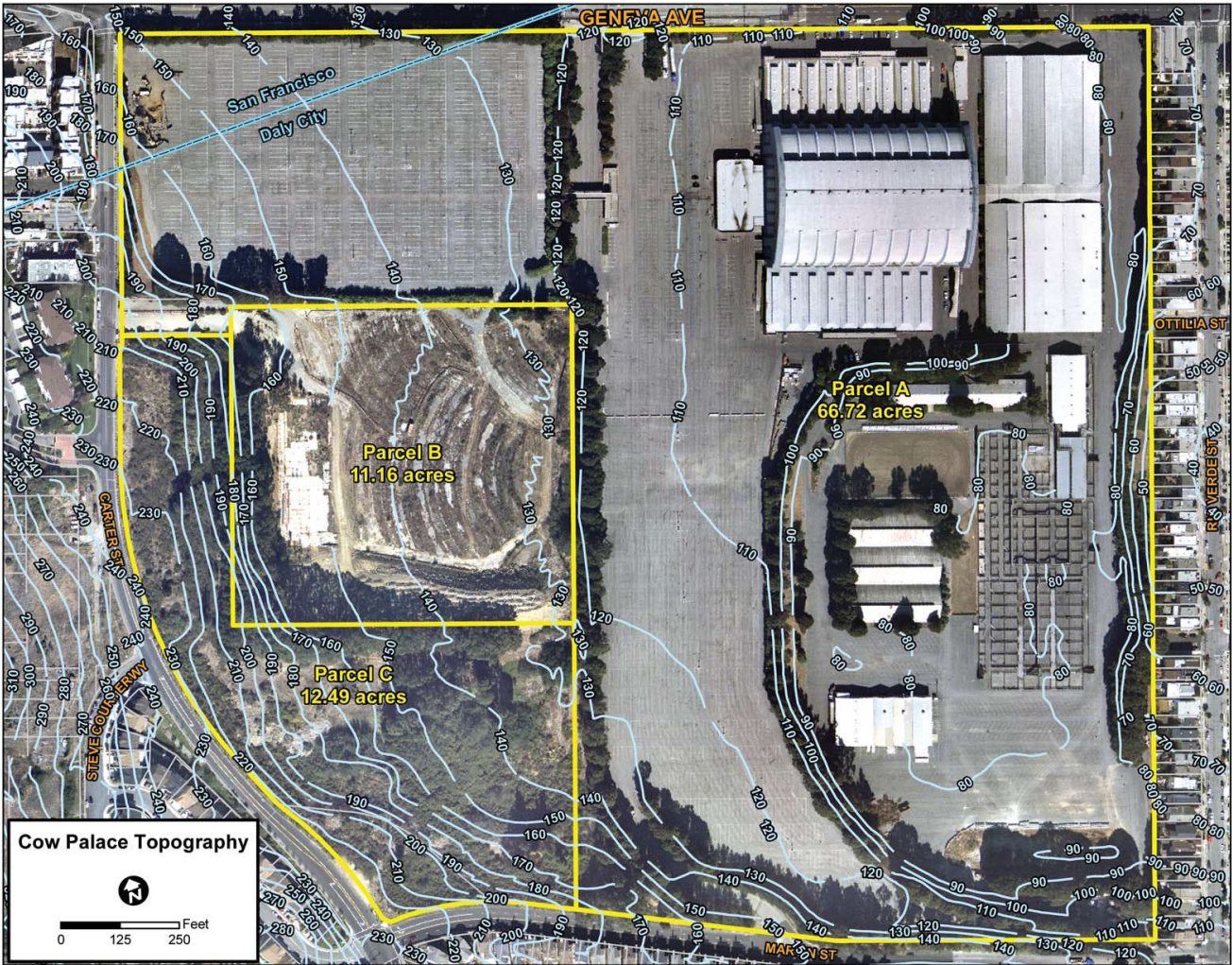


Figure 2: Site Aerial with Topography and Zoning Information – Carter/Martin Site



Parcel A: owned by the Cow Palace
Parcel B: owned by Syufy Enterprises
Parcel C: owned by Daly City Housing Development Finance Agency

Size	APN	Zoning
About 12.5 acres	005-050-240, 005-380-020 (Parcel C)	C-1

2. Submittal Requirements

Submittal Overview

The Agency reserves all rights to amend or modify this RFQ, reject all proposals, extend any dates, or extend that deadline until responses are received.

All materials submitted during any part of the selection process become the property of the Agency. The respondent may designate portions of its submittals, which contain proprietary data as “confidential”, but the Agency cannot guarantee that it will be able to legally enforce such confidentiality.

The Agency shall not be responsible for any costs and/or obligations incurred by and/or on behalf of a potential developer in preparing, submitting or otherwise participating in any part this RFQ, the selection, documentation, or the development process in its entirety. The Agency reserves the right to request clarification or additional information from respondents. Information included in this RFQ is believed to be accurate but should be independently verified by potential respondents prior to reliance upon.

Statement of Qualifications (SOQ) Content

The Agency’s top priority is to select (a) development partner(s) for the Carter/Martin Site to design and build a residential development that has an affordable housing component consistent with Community Redevelopment Law and the exemptions permitted under the California Surplus Land Act (Gov. Code § 54220 et seq.).

Respondents shall provide all of the information that follows in this Section. Once the Evaluation Committee has the opportunity to evaluate each response, some or all respondents may be invited to make specific project presentations and/or be invited for personal interviews.

Respondents selected to advance to interviews will be notified via email. Based on interview results, next steps may include, but not be limited to, additional submittals, financial references, and a preliminary LOI which would include a description of the proposed development, purchase price and terms, project delivery and performance benchmarks.

For the Submittal, at a minimum, please include the following information:

1. **Letter of Introduction** – Include a summary of the respondent’s basic qualifications, experience, past and current project experience of similar nature and size, and reasons for interest in this opportunity. The letter must be signed by a principal or authorized officer including a statement that the officer may make legally binding commitments for the entity.
2. **Description of potential conceptual project** – Include sufficient detail and definition as to proposed development concept to give the Review Committee enough information to

have an idea of what the final development could contain. Include information on proposed populations (including special needs populations) and Area Median Income (AMI) range to be served; community-serving uses; residential amenities; and development phasing. Supporting market data, concept plan, and collateral materials are encouraged to provide support for the proposed concept.

3. **Team Members** – Identify members of the development team and provide a brief description of each team member's role including the following:
 - Principals involved in the project.
 - Resumes of key team members.
 - A description of team member's proposed role and relevant experience with projects of similar nature and size and experience in and familiarity with development in Daly City or surrounding areas.
 - An organizational chart.
 - Designation of lead contact for the team.
4. **Relevant Project Experience** - A summary of current and previous experience of the team with regards to affordable housing development. As appropriate, this information should include a project description, photos or site plans if available, land uses, dates completed, developer role, cost/value, financing sources, duration of development processes, role of current employees in the project, and existing status as to ownership and leasing of current developments, % owned since project completion, and volume sold/leased. Additionally, please identify similar completed projects in the area that the can be visited, and provide a name and contact information as well.
5. **Project Approach** - A high level summary of the team's approach and anticipated timing related to planning, design, approvals, financing, phasing, development, construction, and operation. Provide examples of processes employed in other similar projects. The Agency's preference for conveyance structure is a fee simple sale. The RFQ response should identify the type of conveyance structure(s) typically preferred by and/or acceptable to the respondent.
6. **Financial Data** - A summary of the potential developer/development entity's capability to source the capital necessary to successfully fund and/or finance the proposed concept. Eventually, a description of the anticipated financing structure to be employed to finance the anticipated project and specific evidence will need to be provided to support proof of the ability to fund a project of this size.
7. **References** - An accurate list of no less than three references (name, title, entity, telephone number and contractual relationship to respondent) that may be contacted with respect to current and past project experience. Additionally, a reference list of and contact information for five to ten public sector elected officials and executive staff involved in the previous projects identified as examples of Relevant Project Experience.

8. **Litigation History with Public Agencies** – Provide information as to any litigation that any developer/development entity that comprises the overall team has had with public agencies over the last ten years.
9. **Community Engagement Process** – Provide a community outreach plan that describes the developer's overall philosophy and strategy for income and engaging the community during the development process.

Submittal Date

Please return RFQs for review by **Monday, August 25, 2025 at 5:00 p.m. Pacific Standard Time** to the contacts listed below. The Agency may continue to solicit qualifications beyond the above date if the Agency, in its respective sole determination, is not satisfied with the number and quality of submittals received.

Submittal Quantities and Contact

Please provide five (5) printed copies of the submittal and one (1) electronic version on a thumb drive, CD, or DVD to:

Lenelle Suliguin, HCD Manager
City of Daly City
Economic and Community Development Department
333 - 90th Street
Daly City, CA 94015

3. Evaluation Criteria, Procedures, and Tentative Timeline

Evaluation Criteria

The following criteria will be used as the primary basis for evaluating developer responses:

- **Experience:** Does this team possess the experience to deliver targeted development projects? (e.g. similar projects, nearby/similar markets, team member experience, litigation)
- **Concept:** Do the developer qualifications demonstrate the ability to meet the Agency's vision and purpose to provide for affordable housing?
- **Access to financial capital:** Does the team demonstrate knowledge of affordable housing financing, experience with affordable housing transactions, and access to capital? (e.g. evidence of financing, references)
- **SOQ Responsiveness:** Completeness, organization, timeliness, etc.

The order of presentation of the above criteria does not necessarily denote the specific importance of the same. Following in-person interviews, eventual selection of a preferred developer will be based on additional factors, such as LOI terms (e.g. financial structure, project valuation, initial financial pro forma), supportive market data, quality of design and development, fiscal impact to the Agency and other taxing entities, and as applicable, project/site components to be provided by the Agency. In its consideration of the response to this RFQ, the Agency may request additional information.

Award Procedures

1. Agency Staff will evaluate and rank responses to this RFQ based on which proposals best satisfy the objectives expressed by the Agency in this RFQ for recommendation to the Agency Board.
2. All respondents will be notified of evaluation results, particularly those firms that have been selected for in-person interviews. Agency Staff shall present the recommendations to the Agency Board which will conduct in-person interviews with developers before the final selection decision.
3. The Agency will pursue negotiations with the top-ranked respondent with the goal of entering into an Exclusive Negotiation Agreement ("ENA") within 30 days of selection. If a satisfactory ENA cannot be negotiated with that respondent, then the Agency will formally end negotiations with that respondent and may pursue negotiations with the respondent that next best satisfies the objectives and goals expressed by this RFQ, as determined by the Agency, or in its sole and absolute discretion proceed on alternative basis, or terminate process.

4. The purpose of the ENA will be to set out a time frame for the selected development team to provide a development proposal consisting of a scope of development acceptable to the Agency. Through the ENA process, the Agency will agree not to negotiate with any other developer regarding the Site.
5. The Agency reserves all rights to modify or terminate the selection process, go outside of the selection process to select a developer, or not select a developer at all. This RFQ and selection process does not constitute any type of offer or creates no contractual or other liability to the Agency. There is no guarantee that a sale will be consummated, or that any project will be reviewed pursuant to this RFQ.

Tentative Timeline

- | | |
|---------------------|--|
| • July 25 | Release of RFQ |
| • August 25 | Developer State of Qualifications (SOQ) due |
| • August 26- Sept 4 | Review and analysis of SOQs |
| • September 8 | Special Agency Board Meeting to interview developers |
| • September 22 | Selection of Developer |
| • October 14 | Consideration of ENA with selected Developer |

4. Additional Documentation and Contact Information

A link to the 2004 Cow Palace Master Plan is available here:

<https://www.dalycity.org/DocumentCenter/View/11679/2004-cow-palace-Master-Plan>

Prospective respondents should feel free to reach out to the City contacts included below for questions regarding this submittal. Thank you for your consideration.

City of Daly City

333 90th Street
Daly City CA, 94015

Tatum Mothershead
Director of Economic
& Community Development
Phone: (650) 991-8159
Email: tmothershead@dalycity.org

Rose Zimmerman
City Attorney
Phone: (650) 991-8122
Email: rzimmerman@dalycity.org

Lenelle Suliguin
HCD Manager
Phone: (650) 991-8256
Email: lsuliguin@dalycity.org



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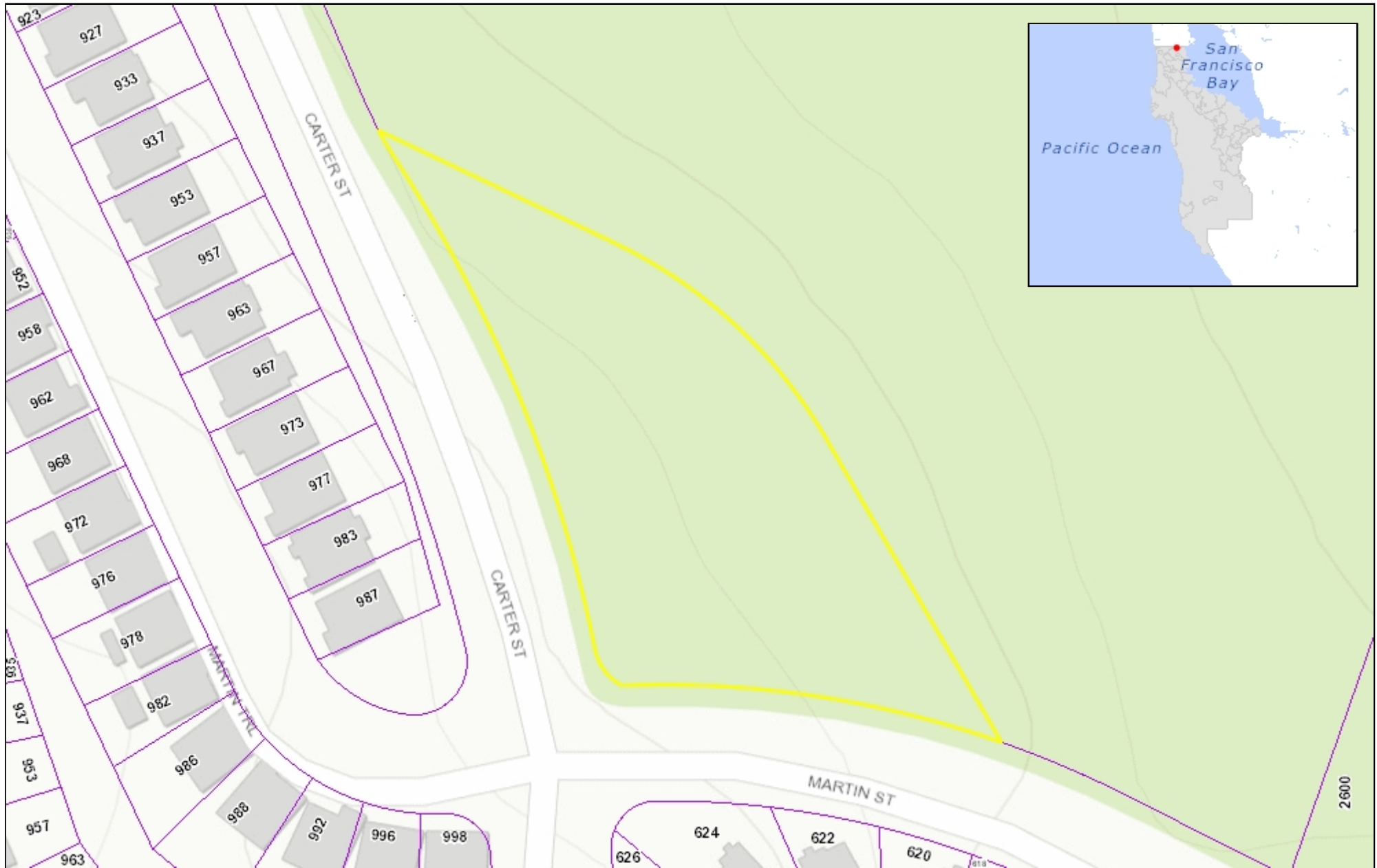
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REQUEST FOR DEVELOPER QUALIFICATIONS

Monday, August 25 2025, 5:00 PM

PROPOSAL



Prepared by

Alegacy L.L.C.
Infrastructure and Real Estate
Development Company
(626) 514-1036
55 9th Street
San Francisco, CA 94103

Prepared for

Lenelle Suliguin, HCD Manager
Economic and Community
Development Department
(650) 991-8159
333 90th Street
Daly City, CA 94015

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SECTION 1

Letter of Introduction



City of Daly City
Housing Development Finance Agency
333 90th Street
Daly City, CA 94015

August 25, 2025

RE: Request for Developer Qualifications

Dear Daly City Housing Development Finance Agency:

ALegacy L.L.C., a certified Minority Business Enterprise (MBE), is pleased to submit qualifications for the Carter/Martin site development opportunity. Over the past year, we have engaged with City staff, community leaders, and adjacent property owners to shape a project vision that is both financially viable and community-centered. Advancement is contingent upon the City's follow-through with the zoning change from C-1 to C-MU, a prerequisite for successful implementation.

Our proposal delivers more than 400 units of 100% affordable housing, supported by essential community- serving components: a grocery store as the central anchor, restaurants, childcare services, and an urgent care medical facility. Shared-use infrastructure—including a multi-level parking structure, parks, and coordinated systems—will further enhance long-term value for Daly City residents.

ALegacy brings the leadership and execution capacity required for a project of this scale. Eugene Cross, P.E., Chief Executive Officer, offers 25+ years of experience and over \$2B in infrastructure delivery. Our executive team collectively represents more than five decades of expertise in housing, clean energy, capital structuring, and community engagement. Together, we combine technical depth with cultural insight to deliver projects that strengthen equity, connectivity, and resilience.

We look forward to collaborating with Daly City on this important initiative. Please feel free to reach me at Eugene.Cross@alegacyllc.com or (626) 768-8940.

Sincerely,



Eugene L. Cross
Chief Executive Officer
ALegacy L.L.C.



On behalf of ALegacy L.L.C., we are pleased to present ALegacy PACIFIC North (People Aligned with Culture, Innovation, Fellowship, and Inclusive Communities) project—a 12.5-acre, multi-phase mixed-use district designed to convert an underutilized site into a resilient place to live, work, and gather. The moment is right to align public and private investment to expand housing supply, accelerate small-business growth, and deliver high-quality public space while meeting sustainability and equity commitments in Daly City's Bayshore Community.

Our proposed project, in accordance with 25 CCR § 103(c)(7)(A), includes no less than 400 units of 100% affordable midrise housing - 45 studios, 180 1-bed, 160 2-bed, and 67 3-bed apartments - complemented by culturally relevant retail, such as grocery stores, food services, a community-focused medical center, early childhood facilities, green spaces, and public amenities. We also propose integrated coordination with neighboring parcels to incorporate a parking structure, shared-use open spaces and essential infrastructure enhancements that maximize both social and economic value across the entire site.

Why ALegacy?

Our team combines infrastructure expertise with cultural insight, offering over 50 years of combined experience in energy, finance, and development. We bring proven capacity to execute complex, community-first projects:

- **Eugene Cross, CEO** – Licensed Professional Engineer with 25+ years leading \$2B in infrastructure and energy development projects. He has delivered 24 projects of commensurate land size and capital requirement (See Appendix B).
- **Ranzel Cross, CSO & Lead Cultural Director** – Filipino American community leader specializing in inclusive planning, engagement, and cultural integration aligned with Daly City's diverse demographics.
- **Alvincé Pongos, CTO** –Filipino American Technology strategist focused on integrating smart systems, clean energy, and digital infrastructure.
- **Nefeli Chanoutsis, COO** – University of California-trained biomedicine and operational leader guiding performance and stakeholder coordination.

ALegacy's mission is to transform underutilized assets into resilient, culturally meaningful destinations that reflect the communities they serve. Our longstanding engagement, financial readiness, and culturally responsive approach uniquely position us to deliver a project that advances Daly City's long-term affordable housing, sustainability, and equity goals.

We welcome the opportunity to build this legacy together.

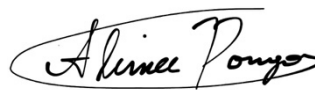
ALegacy L.L.C. Executive Team



Eugene Cross
Chanoutsis



Ranzel Cross



Alvincé Pongos



Nefeli



SECTION 2

DESCRIPTION OF POTENTIAL CONCEPTUAL PROJECT



Project Overview

- **Project Name:** PACIFIC North
- **Location:** Parcel C of Cow Palace/Carter-Martin Site, Daly City, CA
- **APNs:** 005-050-240 and 005-380-020
- **Parcel Size:** 12.49 acres
- **Zoning:** Light Commercial Currently C1, anticipated C-MU
- **Total Building Area:** ~575,000 SF

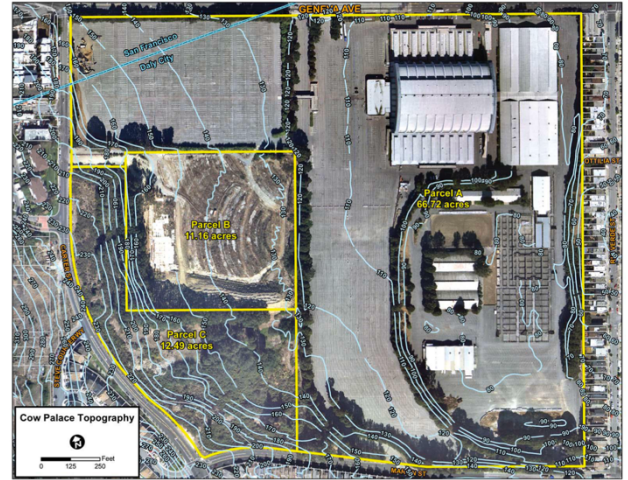


Figure 1: Cow Palace Area Parcels

Development Summary

Component	Description
Residential Units	45 studios, 180 1-bed, 160 2-bed, 67 3-beds apartments
Land Use Mix	75% Residential, 25% Commercial
Community Features	Transit-oriented development, intergenerational care, bike lanes, walking trails and parks, grocery stores, experiential and entertainment spaces, rooftop lounges, and sustainability initiatives
Architectural Theme	Pacific Islander-modern blend with sustainability goals

Affordability Commitment

This project is designed to meet and exceed Daly City’s RFQ targets by delivering over 400 units of fully affordable, mixed-use community. The residential program will dedicate 75% of units to lower-income and 25% to moderate-income households, ensuring a balanced mix of affordability across the site.

Rents will be capped at the lower of prevailing market rate or 80% of the respective Area Median Income (AMI), maintaining long-term affordability, while preserving market competitiveness. Target AMIs are based on household sizes of two, three, and four persons.

In addition to income-based affordability, the project will prioritize services for special needs populations, including:

- Seniors and individuals with disabilities
- Single-parent (female-headed) households
- Families requiring accessible transit and community childcare



This structure advances Daly City's affordability goals while reinforcing equity, stability, and inclusivity for a wide range of residents.

Population Served	Services Provided
Seniors & Individuals with Disabilities	Accessible unit design, on-site health/wellness programming, mobility assistance
Single-Parent (Female-Headed) Households	Spaces for childcare, after-school programming, flexible community space
Families Requiring Transit Access	Proximity to BART/bus lines, discounted transit passes, bike share facilities
All Residents	On-site grocery, urgent care access, community events

Development Phasing

Phase	Year(s)	Activities
Pre-Development	1 – 2	Stakeholder engagement. Capital funding (secured, pending ENA).
Early Planning	2 – 3	General Contractor selection, preconstruction, design and engineering.
Construction	3 – 5	Site preparation and mobilization, interior and exterior construction, building systems, and site improvements.
Commissioning	5	Final inspections and certification for occupancy.
Post-Construction	5 – 6	Full commercial activation and residential move-ins



Community Oriented Amenities

All renderings are conceptual. Final architectural design pending the ENA.

Residential Amenity	Reason	Description
Recreational Park, Trails, Community Garden, & Courtyards 	Daly City General Plan, section Urban Corridor Enhancement Task LU-3.5: <i>“Development plans shall also address the potential for creation of a mixed-use, ‘urban village’ development that includes pedestrian- friendly design”</i> Daly City declared loneliness a public health crisis. Gardens enhance the livability, economic value, and social cohesion of developments.	The development will feature drought-tolerant vegetation, well-paved pathways, parks, recreational courts, and bike trails. This reduces vehicle trips, promotes active living, and supports mental health through accessible outdoor spaces. The community gardens will be a space where residents can actively participate in growing plants and produce while also cultivating friendships with neighbors.
Restaurants & Grocery Spaces 	The Bayshore neighborhood is a food desert with few options for high quality and culturally themed restaurants and grocery stores.	The proposal targets culturally relevant chains like Seafood City and 99 Ranch Market, as well as locally-owned stores to reflect the diverse demographic needs of the neighborhood.
Daycare and Senior Living Partnerships 	The Daly City General Plan, section titled Special Housing Needs: <i>“Daly City has one of the fastest growing aging populations that may not be able to afford housing.”</i> Research shows that intergenerationally designed spaces may have a positive impact for both young and older demographics.	The development plans to integrate a daycare center and senior living homes. The elderly experience renewed energy and companionship, while the children gain wisdom, care, and emotional support.



2. Description of Potential Conceptual Project

Rooftop Lounges 	Based on market research, 66% of respondents stated that they wanted rooftop bars and lounges.	The project will include an elegant rooftop bar with views, warm ambient lighting, and a stylish atmosphere.
Accessible Public Transportation 	Daly City's General Plan, section titled Disability Policy Recommendation: People with disabilities need homes that meet access and functional needs (AFN) and are close to public transportation.	ALegacy's development incorporates accessible designs to meet the needs of the AFN community.
Parking Structure 	Market research findings showed that adjacent businesses want more parking spaces. During Cow Palace events, parking becomes extremely limited, affecting their business traffic. Ensures convenience, reduces street congestion, and supports shared-use access with adjacent properties.	Parking structure designs will fit the design standards of the city and fit the cultural theme of the development project.
Smart Bathrooms 	There is a growing consumer emphasis on health, wellness, and technological convenience. The smart toilet is anticipated to lead the biohacking market, capturing a 35.5% share of smart bathrooms by 2034. Driven by the rising rates of chronic illness, the biohacking market is projected to grow at a rate of 18.92% (CAGR) from 2025 to 2034.	ALegacy LLC aims to meet the growing demand for innovative amenities, helping investments retain value over time. Smart toilets are an example of biohacking, equipped with health-monitoring features to analyze various health metrics



2. Description of Potential Conceptual Project

Community Medical Center 	There is currently no nearby facility, leaving residents without convenient access to healthcare. By building one, residents will benefit from improved access to urgent care, preventative services, and overall wellness support close to home.	Modern Community Medical Center – bringing essential healthcare services directly into the heart of the neighborhood. Modern Community Medical Center – bringing essential healthcare services directly into the heart of the neighborhood.
Activities for the Family to Enjoy 	Market research shows a significant portion of the neighborhood population consists of family homes. Providing family activities will benefit the community.	The mixed-use development will have an activity center where families may enjoy mini-golf, roller skating, bowling, laser tag, and obstacle courses.

Architectural Vision

Our design integrates sustainable construction practices with modern Asian-Pacific Island aesthetics. With support from an Engineering Procurement Construction (EPC) firm, the team will pursue:

- High-performance materials
- Rainwater catchment systems
- Drought-resistant landscapes and
- Other sustainable features

Cultural Identity & Equity

This development is deeply rooted in the value of Asian-Pacific communal unity and celebrates the surrounding community’s rich Asian and Pacific Islander heritage. Led by Ranzel Cross, ALegacy’s Chief Strategy Officer and Lead Cultural Director, our community engagement, design, and tenant mix will be tailored to the cultural and socioeconomic makeup of Daly City’s residents.

Conclusion

The PACIFIC North project represents more than affordable housing—it is a bold, inclusive vision that brings economic, cultural, and environmental value to Daly City. ALegacy L.L.C. is uniquely positioned to deliver a sustainable, community-owned future that reflects the City’s diversity and planning aspirations. Visit: www.alegacyllc.com for ongoing updates.

Site Plan & Massing Overview

The PACIFIC North development is envisioned as a five-building community organized around a central commercial corridor that serves as both a pedestrian spine and a cultural gathering place. The site design emphasizes walkability, connectivity, and access to essential services, with buildings positioned to maximize open space, daylight, and community interaction.

Each building is massed to balance residential density with human scale, ensuring comfortable streetscapes and clear sightlines. The corridor is activated by ground-level parking, plaza-level retail and community-serving amenities, including grocery and dining spaces, that anchor daily activity. Upper floors provide a mix of affordable housing units, with design variations across buildings to create visual interest while maintaining architectural cohesion.

Open spaces, courtyards, and landscaped areas are interspersed between the buildings, creating natural breaks and opportunities for recreation, gardens, and cultural expression. Structured parking is integrated to support both residents and visitors without detracting from the pedestrian environment.

This site plan reflects a transit-oriented, mixed-use vision that integrates housing, retail, and services within a cohesive framework – promoting community vitality and long-term sustainability.



Figure 2: 2D site plan. 5 buildings creating a commercial corridor. Ground-level parking, plaza-level commercial spaces, and upper floors for affordable housing.



Figure 3: Conceptual massing design, perspective 1. Meant to illustrate integrated residential blocks with commercial corridor, green spaces, and connectivity to the surrounding neighborhood.



Figure 4: Conceptual massing design, perspective 2. Emphasizing residential density, stepped building forms, integrated commercial corridor with greenery, and within the neighborhood fabric.





Figure 5: Commercial corridor massing, detailing the cross-sectional view of the corridor. The vision for the commercial corridor is illustrated in Figure 6.



Figure 6: Conceptual rendering of commercial corridor, featuring residential units overlooking restaurants, water elements, and entertainment spaces.



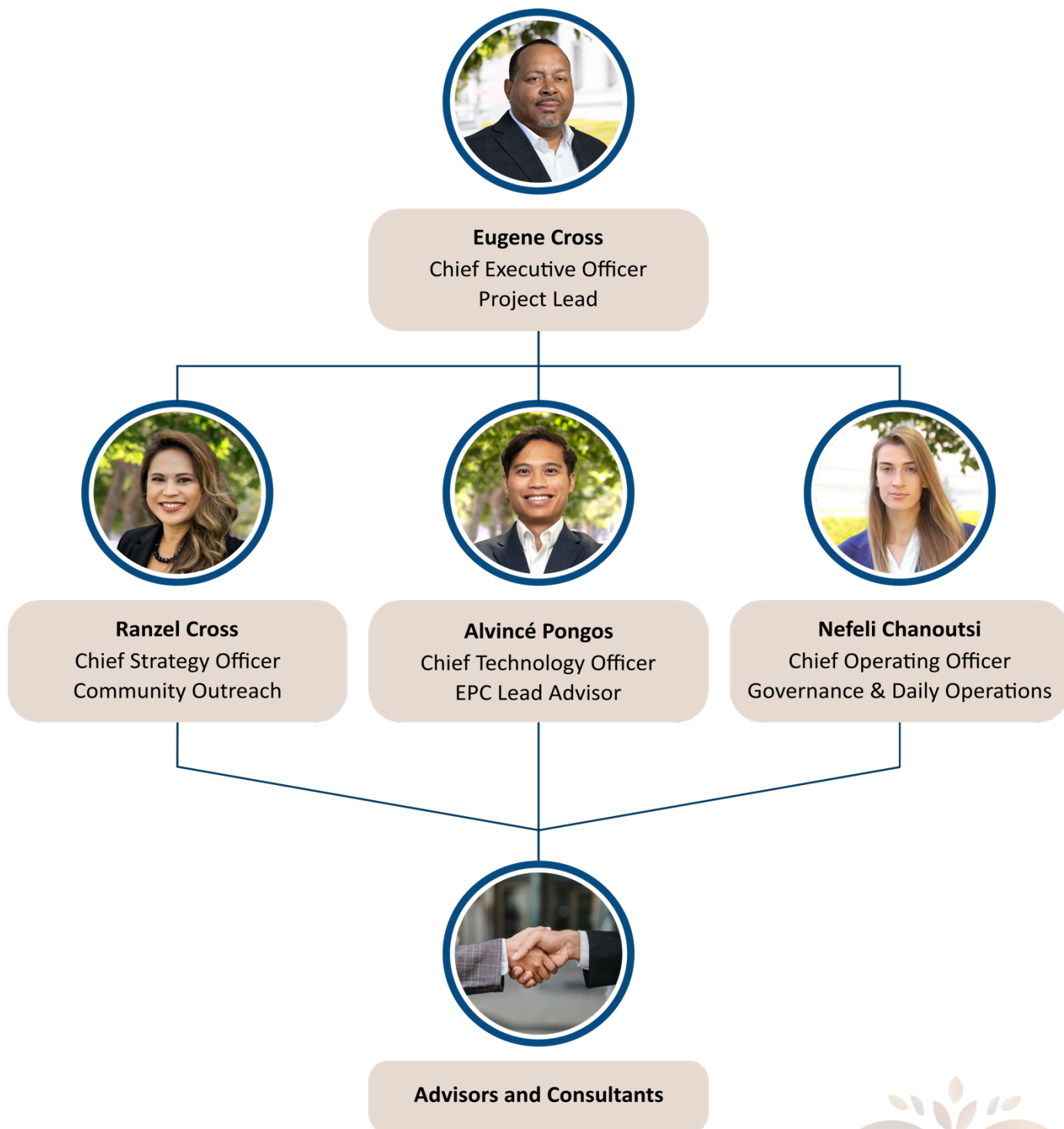
SECTION 3

TEAM MEMBERS



Organizational Chart

ALegacy L.L.C. | Developer for Pacific North Mixed-Use Community



Our Team Approach

ALegacy LLC | Developer for Pacific North Mixed-Use Community

ALegacy L.L.C. offers a unified and experienced team to lead the development of the PACIFIC North Mixed-Use Community, a landmark project that blends affordable housing, culturally relevant commercial spaces, and vibrant public amenities. With deep expertise in infrastructure development and community-focused project delivery, we provide hands-on leadership from conceptual planning through construction completion—ensuring quality, compliance, and alignment with Daly City’s long-term vision.

Our team will oversee every phase of project execution, including design, engineering, and procurement coordination, cost and schedule management, and stakeholder engagement. We will work collaboratively with City agencies, adjacent property owners, and community organizations to ensure seamless integration of site infrastructure, public spaces, and resident-focused amenities.

Led by Eugene Cross, Professional Engineer (P.E.), and Ranzel Cross, our approach combines technical excellence with cultural and operational insight. ALegacy is committed to delivering a sustainable, inclusive community that reflects Daly City’s diverse identity and fosters long-term social and economic vitality.



Eugene Cross, P.E., MBA – Chief Executive Officer

Eugene Cross brings over 25 years of leadership in infrastructure, energy, and capital development, with a track record of delivering more than \$2 billion in infrastructure projects for Fortune 500 companies and public-sector clients across the U.S. Originally from Ohio and now based in California, he leads ALegacy’s strategic vision with a focus on resilient, community-driven development. Eugene oversees project execution, financial stewardship, and stakeholder alignment, ensuring successful outcomes at every stage. He also serves as the primary point of contact for ALegacy and can be reached at Eugene.Cross@alegacyllc.com.



Ranzel Cross, MBA – Chief Strategy Officer

Born in the Philippines and raised in California, Ranzel Cross brings over 30 years of leadership across education, clean energy, finance, and project management. As Chief Strategy Officer at ALegacy L.L.C., she leads strategic partnerships, community engagement, and cultural alignment across all projects. She has successfully delivered more than \$3.6 million in complex, high-profile events from conception to completion – managing executive-level scripts, cross-functional coordination with internal and external stakeholders, and budget oversight. In addition, Ranzel serves as Board Vice Chair for the Filipino American Service Group, Inc. (FASGI), underscoring her commitment to advocacy, inclusion, and community-driven development. Her work ensures ALegacy’s initiatives are both strategically positioned, and impact driven.

Our Team Approach

ALegacy L.L.C. | Developer for Pacific North Mixed-Use Community

In addition to our executive leadership, ALegacy’s project team is strengthened by specialists in technology, operations, and community partnerships who bring hands-on expertise to every phase of development. This collaborative team structure ensures that technical innovation, sustainable practices, and culturally responsive design are fully integrated into the PACIFIC North Mixed-Use Community.

Alvincé Pongos – Chief Technology Officer



Alvincé Pongos leads technology strategy and systems development at ALegacy L.L.C., bringing over a decade of experience from leading institutions including MIT and UC Berkeley. He has successfully delivered more than \$5 million in advanced technology projects, including large-scale brain and health system initiatives that resulted in nine co-authored publications in top-tier engineering and scientific journals such as IEEE and Nature. Alvincé specializes in designing data-driven solutions that enable strategic decision-making and cross-functional collaboration. His leadership ensures ALegacy’s projects are guided by cutting-edge innovation, sustainability, and operational efficiency – positioning the firm at the forefront of tech-integrated community development.

Nefeli Chanoutsi – Chief Operating Officer



Nefeli Chanoutsi leads operational strategy and sustainable development at ALegacy L.L.C., guiding complex projects from concept through completion. She has successfully delivered over \$1 million in research projects focused on oncology and gene delivery approaches, contributing to foundational discoveries in cancer therapies and genetic diseases. With a background in molecular biomedicine, bioengineering, and systems leadership – shaped by research roles at UC Berkeley and UC San Francisco – she drives high-performance execution and cross-functional coordination. Nefeli’s early career in Greece’s tourism sector brings a global, culturally inclusive perspective that strengthens ALegacy’s mission to deliver efficient, impactful, and community-centered developments.

Advisors and Consultants



ALegacy L.L.C. maintains a network of highly qualified leaders of the Asian Pacific Islander community, advisors and consultants who provide specialized insight and technical depth across key project areas. These professionals are engaged on an as-needed basis to enhance project delivery and ensure informed decision-making at every stage. Our advisors and consultants include licensed engineers, construction professionals, healthcare facility planners, environmental consultants, MEP specialists, sustainability advisors, and regulatory compliance experts.

Eugene L. Cross, MBA, P.E.

eugene.cross@alegacyllc.com | (626) 768-8940 | Los Angeles, CA | [LinkedIn](#)

Expert in commercial operations, project development, engineering, construction, and asset optimization with 25+ years of success leading multimillion-dollar infrastructure projects.

Core Competencies

➤ Project Development (Early-Stage to COD)	➤ Engineering & Construction (EPC)	➤ M&A & Deal Origination
➤ Asset Management & Optimization	➤ Energy Storage (BESS) & Renewable Integration	➤ Financial Modeling & Risk Analysis
➤ Regulatory Strategy (CAISO, PJM, ERCOT)	➤ Transmission & Grid Planning	➤ Leadership & Team Building

PROFESSIONAL EXPERIENCE

ALegacy L.L.C | 2023 – Present

Co-Founder & Chief Executive Officer

- Define and execute the company’s strategic vision, driving business growth and financial sustainability.
- Oversee investment decisions, business development, and operational execution.
- Lead stakeholder engagement, securing partnerships, and ensuring alignment with market trends and regulatory frameworks.

Aypa Power, LLC (Blackstone Portfolio Company) | 2023

Senior Manager, CAISO Development

- Led the development of seven large-scale energy storage projects (six 400MW/1600MWh BESS and one 150MW solar hybrid).
- Managed site selection, permitting, and interconnection processes for CAISO market projects. Directed cross-functional teams, including real estate, engineering, finance, and legal, to ensure project viability.
- Conducted due diligence, financial modeling, and risk assessment for acquisitions and development projects.



Eugene L. Cross, MBA, P.E.

eugene.cross@alegacyllc.com | (626) 768-8940 | Los Angeles, CA | [LinkedIn](#)

Middle River Power, LLC | 2021 – 2023

Director of Development Engineering

- Led engineering and development for 1.5 GWh+ BESS projects, managing project feasibility, interconnection, and financing.
- Established supplier relationships with top-tier BESS technology providers and EPC contractors.
- Negotiated contracts for engineering, procurement, and construction (EPC) and original equipment manufacturers (OEMs).
- Successfully advanced four co-located BESS projects to Notice to Proceed (NTP), securing internal and private equity approvals.

LG Chem Power, Inc. | 2017 – 2020

Energy Storage Solutions (ESS) Operations – North America

- Managed technical execution for 30+ utility-scale and C&I BESS projects (200KW – 40MW), generating \$220M in revenue.
- Increased North American revenue by \$25M through business expansion and strategic project execution.
- Led project delivery, commissioning, and regulatory compliance across CAISO, PJM, and ERCOT markets.

CrossConcepts, LLC | 2014 – 2023

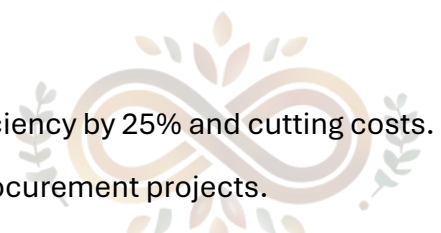
Principal | Energy & Infrastructure Consulting

- Provided EPC consulting on renewable energy and BESS projects for clients in CAISO, PJM, and ERCOT.
- Led due diligence on \$100M+ transmission asset acquisitions and structured financing strategies for large-scale projects.
- Developed and delivered \$5M+ community solar and storage projects, managing site selection, financing, and permitting.
- Served as a CAISO regulatory strategist, advising clients on hybrid solutions (BESS and renewables or thermal generation).

Southern California Edison (SCE) | 2007 – 2014

Senior Manager, Technology Program Management (2013 – 2014)

- Revived and implemented a \$5M technology program, improving efficiency by 25% and cutting costs.
- Developed regulatory compliance solutions for large-scale power procurement projects.



Eugene L. Cross, MBA, P.E.

eugene.cross@alegacyllc.com | (626) 768-8940 | Los Angeles, CA | [LinkedIn](#)

Manager, Intra-Year Planning (2010 – 2013)

- Reduced real-time market spikes by 50% with innovative pricing and dispatch models.
- Developed nodal price forecasts, optimizing bidding strategies and reducing financial risk.

Senior Project Manager, Resource Optimization (2007 – 2010)

- Led team that developed energy and ancillary service price forecasting tools to support CAISO Market Redesign and Technology Upgrade.
- Designed an econometric model for locational marginal price (LMP) forecasting, supporting power trading strategies.

NextEra Energy Resources (formerly FPL Energy, LLC) | 2001 – 2007 Business Manager

- Managed profit and loss (P&L) for six wind farms and an 800MW gas/oil cogeneration facility, optimizing financial performance.
- Increased earnings by \$2.6M annually and reduced operating costs by 50% through asset optimization.
- Spearheaded re-powering strategies, modernizing wind farm technology and improving efficiency.

EDUCATION & CERTIFICATIONS

- Master of Business Administration in Finance – Southern Illinois University, Carbondale
- Master of Science in Nuclear Engineering – University of Missouri, Columbia
- Bachelor of Arts in Physics – Ohio Wesleyan University
- Professional Engineer (PE) – Florida (Active License)

Additional Certifications & Technical Skills

- Lean Six Sigma & Time Series Analysis – California Institute of Technology (Caltech)
- Software: MS Office Suite, AutoCAD, SAS, GridView (Electric Transmission Models)



Ranzel P. Cross, MBA

ranzel.cross@alegacyllc.com | (626) 394-2346 | Los Angeles, CA | [LinkedIn](#)

Extensive experience in project management, strategic engagement, and marketing communications. Adept at developing and executing high-impact initiatives that drive organizational success, enhance brand visibility, and foster strong partnerships.

Core Competencies

➤ Strategic Planning & Execution	➤ Business Development & Partnerships	➤ Project & Program Management
➤ Marketing & Corporate Communications	➤ Stakeholder & Community Engagement	➤ Event Planning & Execution
➤ Data Analysis & Process Improvement	➤ Change Management & Organizational Development	➤ Leadership & Team Building

PROFESSIONAL EXPERIENCE

ALegacy L.L.C. | 2024 – Present

Co-Founder & Chief Strategy Officer

- Lead the development and execution of the company’s strategic initiatives and long-term vision.
- Conduct market research, competitive analysis, and risk assessments to identify growth opportunities.
- Oversee planning and implementation of business initiatives with consultants, contractors, and key stakeholders.
- Ensure compliance with local, state, and federal regulations, and developing policies to align with company goals.
- Establish performance metrics to evaluate strategic effectiveness and drive continuous improvement.
- Foster a culture of innovation by implementing training programs aligned with the company’s strategy.
- Collaborate with executives, committees, and consultants to implement and refine business strategies

Filipino American Service Group, Inc. (FASGI) | Board Vice Chair (2022 – Present)

- Champion FASGI principles at public events, enhancing community engagement and partnerships.
- Collaborate with executive leadership to support governance and strategic initiatives.
- Facilitate board meetings, oversee policy implementation, and ensure regulatory compliance.

Ranzel P. Cross, MBA

ranzel.cross@alegacyllc.com | (626) 394-2346 | Los Angeles, CA | [LinkedIn](#)

Southern California Edison (SCE) | 2005 – Present

Marketing & Communications Advisor, Engineering & Design Solutions (2024 - Present)

- Develop and implement integrated marketing strategies and campaigns to enhance brand awareness and audience engagement.
- Craft compelling content for social media, websites, newsletters, and press releases to communicate key messages effectively.
- Analyze market trends and performance metrics to refine marketing strategies and align with business objectives.
- Coordinate cross-functional teams to ensure consistent messaging and branding across all communication efforts.
- Manage relationships with media outlets, partners, and stakeholders to maximize exposure and foster strategic collaborations.

Trade Shows & Events Advisor, Customer Strategic Engagement / Strategic Business Engagement (2020 - 2024)

- Led corporate events and strategic partnerships between Southern California Edison and key stakeholders, including government officials, non-profits, customers, and business leaders.
- Managed event logistics from start to finish, including budgeting, communication strategies, invitations, speaker coordination, branding, and production.
- Conducted executive briefings and stakeholder meetings to ensure alignment on messaging and event objectives.
- Transitioned in-person community events to highly engaging virtual events, leveraging expert speakers and relevant content.
- Strategic use of social media increased audience engagement, leading to a 264% increase in participation for key events.

Trade Shows & Events Specialist, Strategic Business Engagement (2019 - 2020)

- Managed and executed cultural events, advisory panels, and customer engagement initiatives to strengthen relationships with stakeholders.
- Developed project plans, identified risks, and implemented process improvements to increase operational efficiency and reduce costs.
- Analyzed survey data to drive continuous improvement in stakeholder engagement and event satisfaction.
- Created impactful presentations and reports to influence decision-making and strategic initiatives.



Ranzel P. Cross, MBA

ranzel.cross@alegacyllc.com | (626) 394-2346 | Los Angeles, CA | [LinkedIn](#)

Business Analyst II, Energy Analysis & Customer Outreach (2010 - 2019)

- Facilitated execution of projects and events by coordinating cross-functional teams to streamline operations.
- Developed marketing and communication plans that integrated department-wide objectives.
- Created data-driven reporting tools to prioritize projects, optimize resources, and enhance decision-making.
- Spearheaded fundraising initiatives, exceeding team goals by 200% and raising over \$451K for non-profits.

EDUCATION & CERTIFICATIONS

- Master of Business Administration – University of La Verne, La Verne, CA Concentrations: Management & Leadership, Supply Chain Management
- Bachelor of Science in Business Management – University of Phoenix, Phoenix, AZ

Additional Training & Technical Skills

- Project Management & Event Planning Digital Marketing & Brand Strategy
- Data Analytics & Business Intelligence Software:
- Microsoft Office Suite (Excel, PowerPoint, Word, Visio, Teams, Outlook) SharePoint, Verint, Whova, Squarespace, Lotus Notes, Zoom
- Adobe Acrobat, Canva, Constant Contact
- Business Objects, Microsoft Project, Snag-It

AWARDS & RECOGNITION

- SCE Edison Award Nominee (2024) – (Highest Employee Award)
- SCE J.K. Horton Humanitarian Bronze Award – (2023)
- SCE Customer Champion Award Winner – 2016-2018
- SCE Chairman's Award Nominee – 2015
- SCE Star Behavior Awards (2014) – (Recognized for exceptional service and customer experience)
- SCE WOW Award Winner – Multiple Years
- SCE Achievement Award (Manager-Nominated) – 2006-2012
- SCE Excellence Award (Manager-Nominated) – 2005-2010



Ranzel P. Cross, MBA

ranzel.cross@alegacyllc.com | (626) 394-2346 | Los Angeles, CA | [LinkedIn](#)

PROFESSIONAL AFFILIATIONS

Filipino American Service Group, Inc. (FASGI) | Board Vice Chair (2022 – Present)

- Collaborate with executive leadership and government staff to support governance and strategic initiatives.
- Lead board meetings, oversee policy implementation, and ensure regulatory compliance. Represent FASGI at community events, enhancing public engagement and partnerships.

Asian American Professional Association (AAPA) | Committee Member (2022 – Present)

- Organize events for member meetings, fundraising events, graduations, and alumni engagement
- Assist executive director and program director with solicitations for donations

KEY IMPACT & ACCOMPLISHMENTS

- Drove a 264% increase in audience engagement by leveraging social media and digital outreach strategies.
- Spearheaded corporate events that strengthened relationships with business leaders, government officials, and non-profits.
- Secured over \$450K in funding for non-profits through strategic engagement and fundraising initiatives. Optimized marketing and communication strategies to elevate brand presence and stakeholder engagement.
- Transformed in-person community events into dynamic virtual experiences, maintaining high levels of participation and interaction.



Alvincé L. Pongos, Ph.D. Candidate

alvince.pongos@alegacyllc.com | (909) 489-6461 | San Francisco, CA | [LinkedIn](#)

A decade of experience in technology development and scientific research. Passionate about integrating AI-driven solutions to enhance community living, sustainability, and operational efficiency

Core Competencies

➤ Artificial Intelligence	➤ Machine Learning	➤ Project Management
➤ Computational Modeling	➤ Stakeholder & Community Engagement	➤ Research & Product Development
➤ Data Acquisition & Predictive Analytics	➤ Systems Optimization	➤ Leadership & Team Building

PROFESSIONAL EXPERIENCE

ALegacy L.L.C. | 2024 – Present

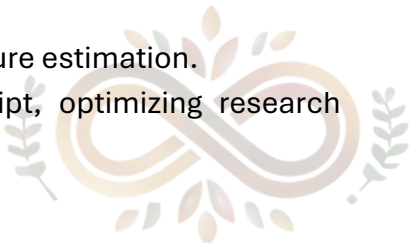
Co-Founder & Chief Technology Officer

- Lead the technology strategy and digital transformation for ALegacy’s mixed-use real estate developments, integrating AI-driven smart infrastructure.
- Design and implement data acquisition protocols and AI analytics to enhance urban planning, operational efficiency, and predictive maintenance.
- Spearhead the development of smart community solutions, including intelligent home automation, AI-assisted urban spaces, and energy-efficient designs, and drive innovation in tech-enabled real estate by establishing strategic partnerships with technology firms, real estate investors, and public agencies.
- Oversee AI and IoT-based research initiatives that improve community engagement, sustainability, and economic opportunities in mixed-use developments.

Massachusetts Institute of Technology (MIT) | 2019 – 2021

Research Associate

- Developed 12 full-stack web applications for research data collection, analyzing fMRI and MEG brain data from over 500 participants.
- Led projects investigating AI applications in language processing, utilizing signal processing, machine learning, and natural language processing (NLP).
- Built Amazon Web Services (AWS) infrastructure for AI-driven linguistic feature estimation.
- Mentored research teams in Python, MATLAB, SQL, PHP, and JavaScript, optimizing research workflows for AI and computational neuroscience.



Alvincé L. Pongos, Ph.D. Candidate

alvince.pongos@alegacyllc.com | (909) 489-6461 | San Francisco, CA | [LinkedIn](#)

Emory University, Department of Biomedical Informatics | 2017 – 2021

Information Analyst & Consultant Software Engineer

- Designed and deployed 30,000+ lines of machine learning and data science code to study neurodegenerative diseases.
- Co-authored research recognized as one of the top 32 biomedical innovations in the U.S. (2019, STAT News).
- Integrated cloud-based AI infrastructure, implementing deep learning models to optimize predictive analytics for cognitive health assessments.
- Engineered mobile and web-based AI applications, advancing real-time bioinformatics and patient monitoring.

Yerkes National Primate Research Center | 2017 – 2018

Information Analyst

- Adapted bioinformatics algorithms for data modeling and predictive analytics.
- Performed quality assurance on gene sequencing data, ensuring high-integrity datasets for neuroscientific research applications.

CrossConcepts L.L.C. | 2015

Project Manager

- Developed an investment prospectus for commercial solar energy projects, analyzing tax incentives, financial structures, and market competition.
- Created 3D commercial site models with geo-location shadow studies to assess utility cost savings and net metering advantages.
- Researched renewable energy policies and finance structures to optimize strategies for real estate-integrated energy solutions.

EDUCATION

- Doctor of Philosophy (Ph.D.) (Joint Program), Bioengineering and Biomedical Engineering – UC Berkeley & UCSF (2021 – Present)
- Bachelor of Science, Applied Mathematics and Computer Science – Emory University (2013 – 2017)
- Economics and Accounting Studies – Ohio Wesleyan University (2010 – 2012)



Alvincé L. Pongos, Ph.D. Candidate

alvince.pongos@alegacyllc.com | (909) 489-6461 | San Francisco, CA | [LinkedIn](#)

TECHNICAL SKILLS

- Programming and AI: Python, TensorFlow, PyTorch, MATLAB, SQL, JavaScript, PHP
- Machine Learning and Data Science: NLP, Predictive Modeling, Bayesian Inference, Deep Learning
- Smart Infrastructure and IoT: Embedded Systems, AWS, Data Acquisition, Automation
- Computational Modeling: Signal Processing, Neural Network Analysis, Adaptive Kalman Filters

AWARDS & RECOGNITION

- National Science Foundation Fellow (2021 – 2026) – Recognized for intellectual merit and broader impacts
- National Institute for General Medical Sciences Fellow (2021 – 2023) – Recognized for intellectual merit and broader impacts
- Top Biomedical Innovation of the Year (2019) – STAT News (for AI-driven health detection system)
- Best Social Enterprise Award (2017) – Recognized for outstanding impact in tech-driven social initiatives
- Howard P. Allen Scholar (2010) – Academic distinction

PROFESSIONAL AFFILIATIONS & COMMUNITY ENGAGEMENT

- BIPOC and LGBTQ+ Entrepreneur Advocate – Mentorship and initiatives supporting underrepresented community members
- SOMA Pilipinas Heritage District Advocate – Championing Filipino cultural and economic revitalization in San Francisco

KEY IMPACT & ACCOMPLISHMENTS

- Led AI and machine learning research in healthcare and neuroscience, contributing to top-ranked biomedical innovations.
- Built cloud-based AI applications, optimizing smart automation.



Nefeli Chanoutsi, M.Sc.

nefeli.chanoutsi@alegacyllc.com | (415) 696-9087 | San Francisco, CA | [LinkedIn](#)

Results-driven professional with experience in biotech research, process optimization, and large-scale commercial real estate development. Adept at streamlining operations, integrating sustainable solutions, and leading cross-functional teams to drive efficiency, innovation, and community impact.

Core Competencies

➤ Operational Efficiency & Process Optimization	➤ Market Research	➤ Fundraising
➤ Community Development	➤ Stakeholder & Community Engagement	➤ Research & Product Development
➤ Cross-Functional Leadership & Training	➤ Biotechnology Research & Laboratory Management	➤ Leadership & Team Building

PROFESSIONAL EXPERIENCE

ALegacy L.L.C. | 2024 – Present

Co-Founder & Chief Operating Officer

- Oversee operational strategy and execution for large-scale mixed-use development projects, integrating clean technologies and sustainable solutions to revitalize communities.
- Develop and implement process improvement protocols, enhancing efficiency in real estate operations and business workflows.
- Build strategic partnerships with investors, government agencies, and local organizations while addressing stakeholder concerns to balance economic progress, cultural heritage, and sustainability.
- Lead cross-functional teams, ensuring strategic execution aligns with company goals, community needs, and investor expectations.
- Establish policies ensuring compliance with regulatory standards, balancing innovation, integrity, and community impact.

Apertor Pharmaceuticals | Alameda, CA | 2024 – 2025

Senior Research Associate

- Established experimental infrastructure
- Characterized in vitro and in vivo effects of bifunctional proximity-inducing molecules for cancer treatment.



Nefeli Chanoutsi, M.Sc.

neveli.chanoutsi@alegacyllc.com | (415) 696-9087 | San Francisco, CA | [LinkedIn](#)

Quantitative Biosciences Institute, UCSF | San Francisco, CA | 2022 – 2024

Research Scholar & Assistant Specialist

- Led three major research projects mapping the PIK3CA interactome across multiple cancer types, identifying therapeutic targets for personalized medicine.
- Established standard operating procedures (SOPs) for complex experiments, training new lab members and improving workflow efficiency.
- Optimized phosphoprotein enrichment protocols, increasing peptide yields by 2.5x.
- Successfully generated over 30 engineered cell lines, introducing p53 mutations to support ongoing cancer research projects.
- Automated AP-MS data analysis using Python (Jupyter Notebook) and RStudio, enhancing data processing efficiency.

Heinrich-Heine-University | Düsseldorf, Germany | 2022

Research Assistant

- Planned and developed gene CRISPR/Cas9 expression plasmids to explore sphingolipid metabolism in atherosclerosis, diabetes, and osteoporosis.
- Performed DNA/RNA extractions, PCR, Western Blotting, and molecular cloning to support biomedical research initiatives.

UC Berkeley, Flannery Lab | Berkeley, CA | 2021 – 2022

Research Intern

- Established a collaboration with Principal Investigator and Nobel Prize Winner Eric Betzig to integrate Light Sheet Microscopy techniques for 3D imaging of retinal tissue.
- Performed intravitreal injections in mice, supporting ophthalmological research.

International Genetically Engineered Machines Competition (iGEM) | Boston, MA | 2018 – 2019

Team Lead & Member

- Led the project "Troygenics - The Odyssey to World Transforming Shuttles".
- Co-fundraised over \$40,000 in research money and resources.



Nefeli Chanoutsi, M.Sc.

neveli.chanoutsi@alegacyllc.com | (415) 696-9087 | San Francisco, CA | [LinkedIn](#)

EDUCATION

- Master of Science, Molecular Biomedicine – Heinrich-Heine-University, Germany (2020 – 2023)
 - Thesis: Cell Mapping of PIK3CA Interactome in Head & Neck Cancer (4.0/4.0 GPA)
- Bachelor of Science, Biology – Bielefeld University, Germany (2016 – 2020)
 - Thesis: The Effects of TGF- β on Glioblastoma Cells (3.5/4.0 GPA)

TECHNICAL SKILLS

- Biotech Research and Data Analysis: CRISPR/Cas9, Flow Cytometry, Phosphoprotein Enrichment, Mass Spectrometry, Immunoprecipitation
- Laboratory Techniques: Mammalian and Bacterial Cell Culture, PCR, RT-PCR, Western Blotting, Viral Transfection and Purification
- Software and Data Analytics: Python (Jupyter Notebook), RStudio, Cytoscape, SPSS, SnapGene, Primer-BLAST, Prism, Inkscape

AWARDS & HONORS

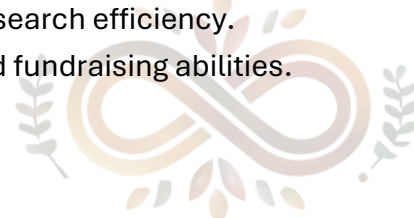
- Gold Medalist (2019) – International Genetically Engineered Machines (iGEM) Competition
- Best Measurement Award and Nominations for Best Foundational Advance Project, Best Hardware, Best New Basic Part
- PROMOS Scholarship (2021) – German Academic Exchange Service (DAAD)

ADDITIONAL QUALIFICATIONS

- Languages: Greek (Native), German (Native), English (Fluent), French (Basic)
- Public Speaking and Science Communication: Presented research findings at international conferences and advisory panels

KEY IMPACT & ACCOMPLISHMENTS

- Optimized operational efficiency in large-scale mixed-use projects at ALegacy L.L.C.
- Led high-impact cancer research at UCSF, pioneering targeted therapy advancements.
- Developed innovative biotech solutions, generating 30+ engineered cell lines for ongoing research.
- Automated data processing using Python & RStudio, increasing scientific research efficiency.
- Raised \$40,000+ for biotech initiatives, demonstrating strong leadership and fundraising abilities.



SECTION 4

RELEVANT PROJECT EXPERIENCE



4. Relevant Project Experience

Relevant Project Experience

Demonstrating our proven capacity to deliver large-scale, community-focused developments

ALegacy L.L.C. is an emerging real estate development and infrastructure firm with a track record of delivering large-scale, capital-intensive projects in highly regulated environments. While the PACIFIC North project represents ALegacy's first affordable housing development, our leadership team brings extensive experience in project finance, clean energy, and complex site development—capabilities that translate directly to the execution of resilient, community-focused housing.

Our background in land acquisition, entitlement, environmental compliance, capital structuring, and project delivery equips us to deliver affordable housing with the same rigor and accountability that has defined our success in the energy sector.

Current Project

PACIFIC North Mixed-Use Master Planned Development

- Location: Daly City, California
- Use Type: 100% Affordable Housing and Commercial Mixed Use
- Scope: over 400 units (45 studios, 180 1-bed, 160 2-bed, 67 3-bed), public amenities, parks, and retail
- Project Period: 2025 – 2030
- Status: Predevelopment phase; engaged with Daly City leadership for over a year
- Role: Lead Developer
- Highlights: Grocery store and medical center along with amenities to facilitate social interaction to reduce loneliness.

Relevant Infrastructure & Clean Energy Project Experience

ALegacy's leadership team is headed by Eugene Cross, P.E., an experienced infrastructure developer with over \$2 billion in infrastructure projects across California, Pennsylvania, Texas, and internationally. He possesses extensive knowledge in project finance and has established relationships with engineering, procurement, and construction general contractors. His expertise encompasses all aspects of infrastructure project delivery, including land acquisition, environmental permitting, design and engineering, as well as construction and operations. A list of his relevant projects and professional references can be found in Appendix [A]. These capabilities demonstrate ALegacy's ability to:

- Navigate complex entitlement and permitting processes
- Manage multi-stakeholder environments
- Lead design and construction teams from concept through commissioning
- Secure private equity and institutional capital for long-term developments



Strategic Application to Housing

The PACIFIC North development leverages ALegacy L.L.C.'s extensive experience managing complex, capital-intensive infrastructure projects, ensuring a disciplined and community-focused approach to delivering high-quality affordable housing and mixed-use spaces.

Capital Strategy & Funding Expertise

We have structured and secured layered financing for large-scale projects, including public-private partnerships and institutional capital—skills directly transferable to affordable housing, where creative, mission-aligned funding is critical.

Site Development & Entitlement

Our background in energy infrastructure includes extensive work in zoning, CEQA/NEPA compliance, permitting, and multi-agency coordination. These capabilities support our ability to navigate complex housing development approvals efficiently.

Sustainability & Infrastructure Integration

The project will incorporate a comprehensive suite of sustainability strategies, including rooftop solar panels and high-efficiency heating, ventilation, air conditioning (HVAC) and Refrigeration systems to reduce energy consumption. Water conservation measures such as low-flow fixtures, rainwater harvesting, and greywater recycling will further enhance environmental performance. Additionally, we will prioritize the use of recycled and renewable materials throughout construction to minimize environmental impact and promote long-term resource efficiency.

Construction Oversight & Delivery

We bring a proven track record in managing procurement, contractor performance, scheduling, and quality control in high-stakes environments—ensuring on-time, on-budget housing execution.

Community Engagement & Cultural Relevance

Led by Chief Strategy Officer Ranzel Cross, our team designs with community voice at the center. PACIFIC North (People Aligned with Culture, Innovation, Fellowship, and Inclusive Communities) is rooted in Daly City's cultural identity, with a focus on serving its Asian and Pacific Islander populations through inclusive, responsive development.

Long-Term Vision

We approach housing not just as builders—but as long-term owner-operators and stewards. Our goal is to create lasting, equitable communities that integrate smart design, sustainability, and cultural authenticity, ensuring ongoing investment in the success and well-being of the residents we serve.



SECTION 5

PROJECT APPROACH



Our project approach integrates strategic planning, community-driven design, and disciplined execution to ensure that every phase – from entitlement through long-term operations – delivers measurable value to Daly City and its residents.

ALegacy L.L.C. | PACIFIC North Affordable Housing and Mixed-Use Development

ALegacy L.L.C. approaches the PACIFIC North (People Aligned with Culture, Innovation, Fellowship, and Inclusive Communities) project with a commitment to cultural authenticity, economic sustainability, and long-term community impact. Our development strategy is grounded in practical experience delivering complex infrastructure projects and shaped by our vision to create a landmark destination rooted in Daly City’s Asian and Pacific Islander heritage.

We understand the significance of this site and have already invested over a year in dialogue with community stakeholders and City staff to align our approach with local goals. Our team brings a disciplined, phased methodology that integrates land use planning, environmental compliance, funding strategy, architectural vision, and construction execution.

Planning & Design Approach

We will lead an inclusive, community-centered planning process with input from stakeholders, adjacent property owners, and City agencies. Our design will prioritize culturally relevant architecture, efficient land use, walkability, and flexible open space and parking structure. The project will include 100% affordable housing alongside retail, parks, and a dedicated parking garage for residents to ensure convenience and accessibility. ALegacy will engage architectural and engineering partners with experience in housing and urban infill to ensure compliance with zoning, building codes, and state-level affordability requirements. The design phase will also incorporate energy resilience, water efficiency, and ADA accessibility.

Approvals & Entitlements

Our team is highly experienced in navigating multi-jurisdictional permitting, including CEQA (although not required for this project) and other environmental reviews. We will coordinate closely with City departments and regional agencies to advance all entitlements in a timely and transparent manner. Our early and ongoing stakeholder engagement is designed to mitigate delays and align development plans with community expectations.

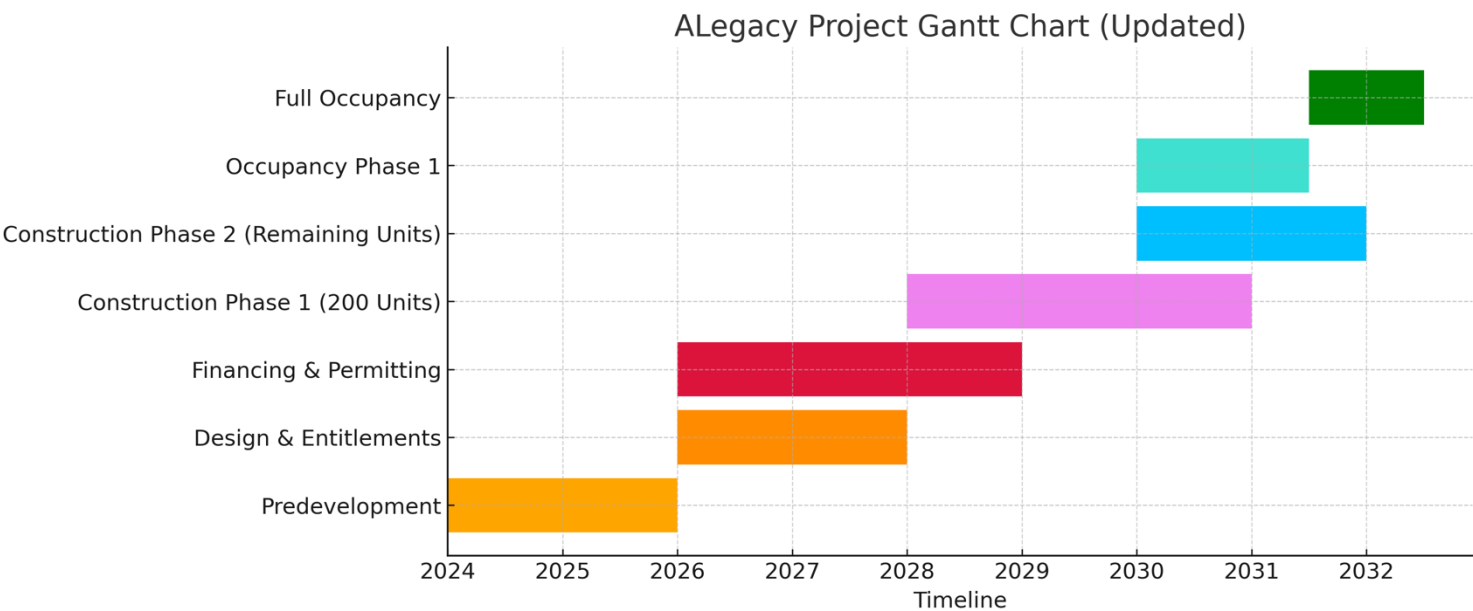
Financing Strategy

We plan to finance this project with a combination of equity (30%) and debt (70%). A more definitive strategy will be established after receiving the ENA, performing the Phase I ESA, and agreeing on the sale price for the Martin/Carter site (see Appendix A). We continue to build relationships with mission-aligned capital partners who support culturally anchored, community-serving projects to optimize stakeholder value.



Phasing & Development Timeline

The project will be executed in logical phases to maximize financial feasibility and infrastructure readiness. ALegacy began predevelopment activities in May 2024, demonstrating our commitment to the project and reflecting the resources already invested to date. This early start has allowed us to conduct site assessments, engage with stakeholders, and work directly with neighbors through surveys and dialogue to ensure community needs are addressed. These proactive efforts mitigate risks and accelerate project readiness as we move into design, financing, and phased construction.



Operations & Long-Term Stewardship

ALegacy is committed to ensuring long-term success and stewardship of the PACIFIC North site. We plan to engage experienced property management and maintenance partners to oversee operations, enforce affordability covenants, and provide culturally competent services. Our goal is to maintain a vibrant, inclusive, and economically resilient community for decades to come.



SECTION 6

FINANCIAL DATA

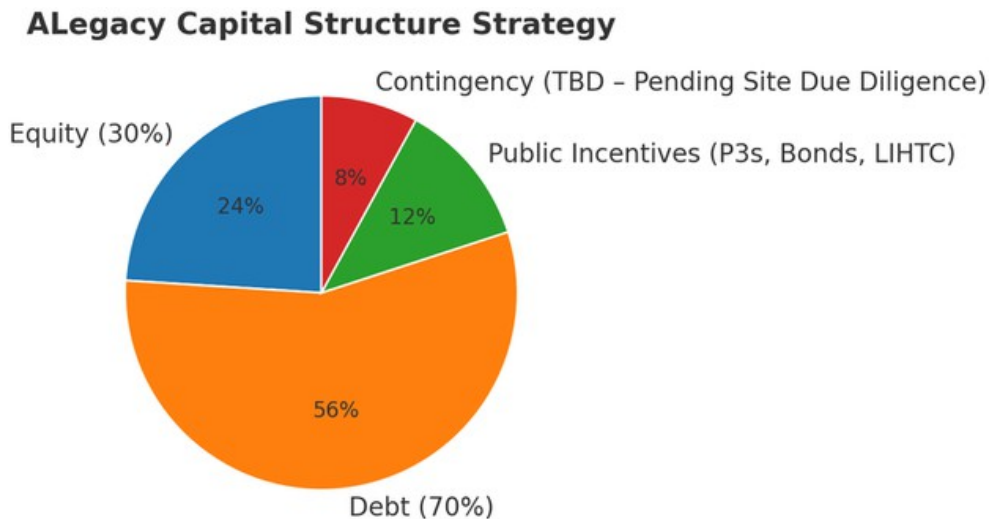


Capital Readiness, Financial Structure, & Investor Engagement

ALegacy is committed to structuring this development with both financial discipline and flexibility to address site-specific risks. A contingency allocation—anticipated at up to 50% of projected land acquisition costs—will be finalized following comprehensive due diligence. This evaluation will address wetlands and habitat preservation, endangered species, soil and geotechnical conditions, non-engineered fill, utility capacity, and the presence of hazardous materials or toxins. By accounting for these potential constraints upfront, ALegacy ensures that the project remains feasible, resilient, and protective of both City and investor interests.

The fee simple sale price for the Carter and Martin sites remains under evaluation, with an updated pro forma anticipated by September 15. At that time, a formal offer price will be provided to the City.

To finance this transformative project, ALegacy is structuring a capital plan anchored by approximately 30% equity and 70% debt, consistent with market practices for large-scale mixed-use development. Additional Capital Reading, Financial Structure, & Investor Engagement details are in the confidential (Appendix A).



SECTION 7

REFERENCES



7. References

The following references demonstrate ALegacy's proven experience and reliability through prior projects and professional partnerships

Eugene Cross

- Dennis Corn, Vice President, Middle River Power
- (Atsu)hiro Suzuki, Vice President, Marubeni International
- Joe Patch, III, President, Patch Services, LLC
- Steven Eisenberg, President, Edison Transmission, LLC

Alvince Pongos

- Evelina Fedorenko Ph.D., Professor, Harvard University and MIT
- Sri Nagarajan Ph.D., Professor, UC Berkeley and UC San Francisco
- Dr. Allan Levey M.D. Ph.D., Professor and Director, Emory University, Goizueta Alzheimer's Disease Research Center
-

Nefeli Chanoutsis

- Nadia Arang Ph.D., UC San Francisco and Mubadala Capital Postdoctoral Scholar and Venture Capital Fellow
- Nageswari (Nage) Yarravarapu Ph.D., Postdoctoral Scholar, Apertor Pharmaceuticals
- Joern Kalinowski Ph.D., Professor, Head of Technology Platform Genomics, Bielefeld University

Ranzel Cross

- Pascualita Flores, Manager, Energy Education Centers – Irwindale, Southern California Edison
- Dustin Johnson, Manager, Energy Education Centers – Tulare, Southern California Edison
- Yey Coronel, Executive Director, Filipino American Services Group Inc. (FASGI)
- Priscilla Randomanski, Retired District Manager, Lorillard Tobacco Company



SECTION 8

LITIGATION HISTORY WITH PUBLIC AGENCIES



Litigation History with Public Agencies

ALegacy L.L.C. confirms that neither the company nor any of its principals, partners, or affiliated development entities have been involved in any litigation, claims, or legal disputes with public agencies.

This clean record reflects our commitment to ethical business practices, transparent project delivery, and strong relationships with public-sector partners.



SECTION 9

COMMUNITY ENGAGEMENT PROCESS



Community Engagement Process

Our community engagement process is rooted in collaboration, transparency, and cultural respect, ensuring every voice helps shape the Pacific North project.

At ALegacy L.L.C., we view community engagement as the foundation for lasting and equitable development. The Pacific North project is envisioned not only as housing, but as a cultural hub that honors identity, restores roots, and strengthens community ties. Our commitment is to ensure residents feel seen, heard, and valued. In Daly City – where Asian and Pacific Islander communities represent over 60% of the population – we have spent more than a year walking the site, listening to local leaders, and incorporating community perspectives into every stage of planning and design.

We have designed a three-phase Community Engagement Strategy that provides transparency:

1. Pre-Development: Listening First

Over the past 10 months, ALegacy has engaged with City staff, residents neighboring the Martin/Carter site (Summit Ridge, Bay Ridge, and Carter Terrace), business owners (Cow Palace and Bay Club), faith organizations (Iglesia de Dios Pentecostal), members in the Daly City Fire Department Station 93, and community organizations (Pacific Islands Together). These early engagements helped us understand neighborhood priorities and guided our design choices, reflecting the strong communal ties and shared care that define Daly City.

To deepen this process, we launched an English-language survey (See examples in Appendix C) that surfaced key community priorities—such as parking, open space, grocery stores, and eateries—which, alongside market research, informed our commitment to intergenerational community centers. Building on this foundation, we will expand outreach through listening sessions across neighborhoods, schools, churches, and cultural organizations, while offering multilingual surveys in English, Tagalog, Mandarin, and Cantonese. Outreach through social media, trusted community leaders, and in-person events ensure engagement with families, seniors, and underrepresented voices, with findings shared back regularly to promote accountability and trust.

Tools:

- Multilingual surveys (print + digital)
- Stakeholder interviews and mapping
- Cultural site walks with residents



2. Design Development: Co-Creation in Action

We will form a Community Advisory Group reflective of Daly City's demographics to weigh in on site plans, building aesthetics, and cultural representation. Public design charrettes and town halls ensure the community shapes the look and feel of their future neighborhood.

Tools:

- Cultural design workshops
- Advisory committee (youth, elders, civic leaders)
- Interactive town halls

3. Post-Occupancy: A Place to Belong

After ribbon-cutting, engagement continues through cultural festivals, public programming, and resident feedback loops. We will measure community health indicators and adapt spaces based on how people use them.

Tools:

- Monthly community events (film nights, food fests)
- Annual cultural impact reports
- Ongoing resident advisory forums

Why It Matters

Led by Chief Strategy Officer Ranzel Cross, whose roots in Filipino advocacy are foundational to our mission, ALegacy's engagement process ensures this community not only welcomes the PACIFIC North project – but feels ownership of it. This is more than a development, it is a space for people to gather, share cultures, and be a community. Our approach turns consultation into collaboration, and blueprints into belonging. Let us build a legacy together!

SECTION 10

APPENDIX (Confidential)

The content contained in this appendix is sensitive and confidential. It may not be disclosed, reproduced, or distributed without the prior written consent of ALegacy L.L.C.

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Appendix C: Community Voices	57



Relevant Past Infrastructure Projects

Below is a list of Eugene Cross's past infrastructure projects, detailing project names, scope of work, land use, years of engagement, locations, and generation capacities. These projects reflect his direct involvement in site selection, land acquisition, and capital funding throughout their development and operational phases in California, Pennsylvania, Texas, and internationally. Rows that are highlighted in green indicate projects requiring at least \$100M of capital and at least 12.5 acres of land, rows in purple indicate projects requiring at least 12.5 acres of land development.

Year	Project Name	Land Uses	Location	Capacity	Scope of Work (SOW)
2024-Present	Palm View	BESS	Texas	9.9 MW/20 MWh	Project Management, Construction Management, Contract Negotiations, Electric Interconnection, Financing and Funding, Procurement and Construction
	SE Edinburg	BESS	Texas	9.9 MW/20 MWh	
	Cotulla	BESS	Texas	9.9 MW/20 MWh	
2022-2023	Juniper	BESS	California	400 MW/1600 MWh	Site selection, Land acquisition, Environmental/ Permitting, Electric Interconnection, Financing, Funding, Procurement, Construction
	Gabriel	BESS	California	400 MW/1600 MWh	
	Quercus	BESS	California	400 MW/1200 MWh	
	Gnarly Osage	BESS - Hybrid	California	150 MW/600 MWh	
	Coral Reef	BESS	California	400 MW/1200 MWh	
	Dirac	BESS	California	400 MW/1200 MWh	
	Marici	BESS	California	400 MW/1600 MWh	
2021-2022	Border	BESS - Co-located w/Peaker	California	52 MW – 1hr solution	Environmental/Permitting, Electric Interconnection, Financing, Funding, Procurement, Construction, Testing, Commissioning, Operations and Maintenance, Decommissioning and Closure
	Henrietta	BESS - Co-located w/Peaker	California	99.4 MW – 1hr solution	
	Hanford 32	BESS - Co-located w/Peaker	California	32 MW – 1hr solution	
	Hanford - hybrid	BESS - Co-located w/Peaker	California	99.4 MW – 1hr solution	
	Malaga 96	BESS - Co-located w/Peaker	California	96 MW – 1hr solution	
	Malaga 44	BESS - Co-located w/Peaker	California	44 MW – 4hr solution	
	Panoche	BESS - Co-located w/Peaker	California	57 MW – 1hr solution	
	Vaco Dixon	BESS - Co-located w/Peaker	California	57 MW – 1hr solution	

Appendix B: Relevant Past Projects

	Border - 150	BESS - Co-located w/Peaker	California	150 MW – 1hr solution	
	Enterprise	BESS - Co-located w/Peaker	California	52 MW – 1hr solution	
2017-2020	Fluence Algonquin	BESS	Ottawa, ON	0.5 MW/2 MWh	Construction, Testing, Commissioning, Operations and Maintenance, Decommissioning and Closure.
	Fluence - SCE	BESS	California	250 kW/250 kWh	
	Fluence - Brunswick	BESS	N. Carolina	0.5 MW/0.9495 MWh	
	Fluence - Finchville	BESS	Otisville, NY	2 MW/4 MWh	
	Fluence (Walden)	BESS	West Walden, NY	6 MW/8 MWh	
	Fluence (Cronin)	BESS	Bossier City, LA	1.5 MW/6 MWh	
	Fluence (Alfawal)	BESS	Talagante, Chile	10 MW/50 MWh	
	Schneider Electric (NIAC)	BESS	Santa Cruz, CA	125 kW/250 kWh	
	Schneider Electric (Thailand)	BESS	Thailand	125 kW/250 kWh	
	ABB Wayside (NYCT)	BESS	New York	1.3 MW/1.3 MWh	
	Solar Turbines	BESS	San Diego, CA	1 MW/4 MWh	
	ORMAT-Plumsted	BESS	New Jersey	20 MW/20 MWh	
	ORMAT- Stryker	BESS	New Jersey	20 MW/20 MWh	
2015-2017	Harper Lake 1	PV	California	3 MW	Site selection, Environmental/ Permitting, Electric Interconnection, Financing, Funding, Procurement, Construction, Testing and Commissioning, Operations and Maintenance, Decommissioning and Closure or Repower.
2013-2014	Tehachapi	BESS	California	8 MW/32 MWh	Operations (i.e., resource planning and bid strategy)
2001-2007	Altamont Power Corporation	Wind	California	64 MW	Environmental/Permitting, Financing, Funding, Procurement, Construction, Testing, Commissioning, Operations and Maintenance, Monitoring, Compliance and Repowering.
	Meyersdale Wind Energy Center	Wind	Pennsylvania	30 MW	Testing, Commissioning, Monitoring, Compliance, Operations and Maintenance
	Waymart Wind Energy Center	Wind	Pennsylvania	64.5 MW	
	Somerset Wind Energy Center	Wind	California	9 MW	
	Mill Run Wind Energy Center	Wind	California	15 MW	



Every voice matters. In this part of the appendix we highlight some of the voices from the Bayshore neighborhood community that we interviewed or surveyed.

"I want to see improvements in the Cow Palace Area: grocery stores, mini golf, and restaurants."

- Steve (Resident of Summit Ridge)

"Hire local contractors and workers"
- Becca Meafua (Pacific Islands Together)

"I want a Pacific Supermarket or other grocery store."
"I would like more medical facilities in my neighborhood"

- Merlita (Resident of Bayshore Heights)

"I don't want anything that will lead to more noise. Cow Palace is already loud. And I don't want anything to interrupt my view."

- Resident at Bayshore Ridge

"I will be a good neighbor"
- Dr. Allison Keaney
(CEO of Cow Palace)

"We need more parking. When Cow Palace has events, no one has anywhere to park anymore."

- Nina (Church owner at Iglesia de Dios Pentecostal)

"Rooftop bars would be cool. On our breaks we look for places to hang out."

- Firefighter at Daly City Firestation 93

"I would like to see something developed on these empty lots."

- Worker at the Bay Club

"I have lived here over 10 years. I would like to see it developed. An Espetus Steakhouse would be nice."

- Marquez (Resident at Summit Ridge)

"I would like parks, a roller skating rink, mini golf, a Trader Joe's..."

- Linda (Resident at Summit Ridge)



Developer Qualifications for Daly City Housing Development Finance Agency **Carter/Martin Site Development Opportunity**

August 25, 2025

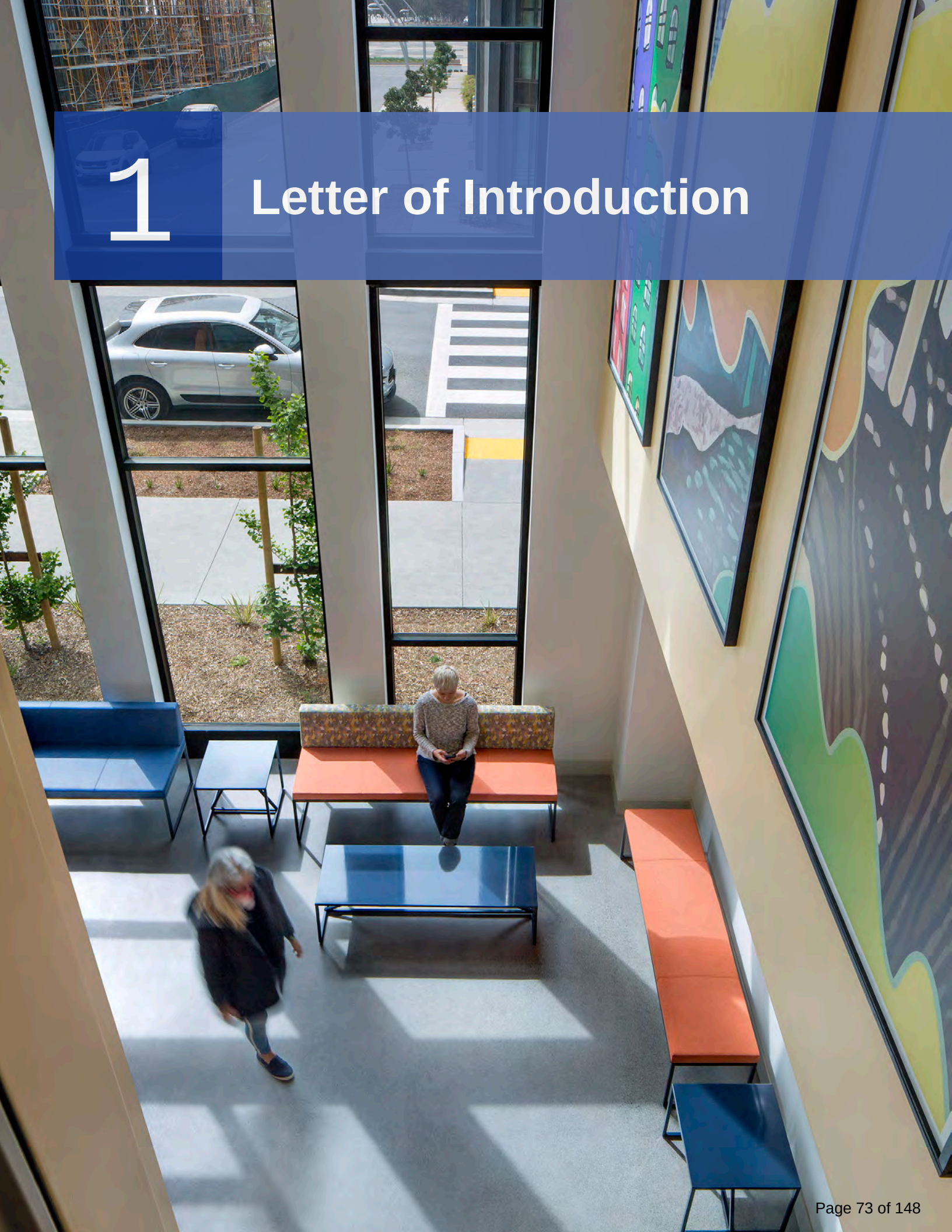
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2	Description of Potential Conceptual Project
3	Team Members
4	Relevant Project Experience
5	Project Approach
6	Financial Data
7	References
8	Litigation History with Public Agencies
9	Community Engagement Process



1

Letter of Introduction



August 25, 2025

Lenelle Suliguin, HCD Manager
City of Daly City
Economic and Community Development Department
333 90th Street
Daly City, CA 94015

RE: Request for Developer Qualifications: Carter/Martin Site

Dear Ms. Suliguin,

On behalf of HumanGood Affordable Housing (HGAH), Waterford Property Company (Waterford), and HKIT Architects (HKIT), please accept this submission in response to the Daly City Housing Development Finance Agency's Request for Developer Qualifications for the Carter/Martin Site.

Beacon Development Group, a HumanGood Company (BDG), HGAH's development arm, has over 25 years of experience in affordable housing development in California, Oregon, and Washington. Utilizing various methods of financing, including potential County, State and Federal Funds, and the Low-Income Housing Tax Credit (LIHTC) program, BDG has developed senior housing for HGAH, as well as for other partners, clients, and local housing authorities. In total, BDG has developed over seven thousand (7,000+) units of affordable housing.

Waterford is an experienced owner-driven diversified real estate investment and development company whose core mission is to deliver impactful housing solutions. Waterford has a successful track record in land development and entitlements as well as in the acquisition, management, and repositioning of multifamily and commercial properties. Since its founding in 2014, Waterford has acquired and developed over \$3 billion in real estate assets, which includes 7,384 multifamily units.

Since 1948, HKIT Architects has brought enthusiasm, commitment, and invaluable experience to each of their projects. They maintain an average of 60 professional staff dedicated to design and client relationships. Their size and structure allow for a level of specialization and client attentiveness characteristic of small firms while affording the strength and flexibility of a larger group of professionals. HKIT has a strong record of earning broad-based community acceptance through designs that are sensitive to neighbors, highly functional and resolve difficult sites. In addition, they strive to ensure that their designs reflect the client's requirements, circumstances, site, and budget.

In response to this RFQ, HGAH, Waterford, and HKIT Architects propose to develop 200 units of housing, which includes 75 affordable senior housing apartments to be developed by BDG/HGAH and 125 market-rate multifamily apartments to be developed by Waterford. Through this proposal, our teams look to enhance underutilized surplus land by adding more housing options to Daly City as well as address the affordability crisis faced by families and seniors in the surrounding areas.

Additional Development Team qualifications, past and current project experiences will be highlighted in various sections of this response.

Thank you for your consideration of our submission. We look forward to hearing from you and are available to discuss this matter at your convenience.

Sincerely,

I hereby certify that I am a duly authorized officer of **HumanGood Affordable Housing**, and as such, I have full authority to make legally binding commitments on behalf of the entity in connection with this submission.

By: Jennifer A. Kappen

Name: Jennifer Kappen

Title: Senior Vice President

HumanGood Affordable Housing

I hereby certify that I am a duly authorized officer of **Waterford Property Company**, and as such, I have full authority to make legally binding commitments on behalf of the entity in connection with this submission.

By: _____

Name: Oren Hillel

Title: Director

Waterford Property Company

Signature: Oren Hillel

Oren Hillel (Aug 22, 2025 13:03:58 EDT)

Email: ohillel@waterfordco.com

2

Description of Potential Conceptual Project



2. Description of Potential Conceptual Project

HumanGood Affordable Housing, Waterford Property Company and HKIT (the “Project Team”) proposes to deliver two distinct residential communities alongside a Program of All-Inclusive Care for the Elderly (PACE) Center, together creating a thoughtfully integrated mixed-use development. See attached Concept Plan.

Senior Affordable Housing Community

The senior affordable component will be developed as a single building with 75 apartments, including 74 one-bedroom units and one two-bedroom manager’s unit. The project will serve seniors earning between 15% and 60% of the Area Median Income (AMI), with 20% of the affordable units reserved for special needs and formerly homeless households. Parking will be provided in a garage below the podium. The main pedestrian and vehicular access will be from Martin Street. On the podium level, residents will have access to shared amenities such as a community room, laundry facilities, and generous landscaped outdoor courtyard designed to encourage social interaction and community engagement. This community will be designed to support aging in place, with amenities and supportive services tailored to senior residents.

PACE Center

The PACE Center will be a single-story facility located near the senior affordable housing building. Complementing the housing components, the proposed PACE Center will provide comprehensive medical, wellness, and social services to seniors, enabling them to live independently in their community while avoiding institutional care. Services will include primary care, therapies, social programming, transportation, and care coordination. The project team will collaborate with an established PACE operator, to be identified at a later date, to ensure high-quality service delivery.

Market-Rate Multifamily Community

The market-rate component will consist of three residential buildings, 3 to 4 story residential buildings with a total of 125 apartments, offering a mix of one-, two-, and three-bedroom units. Surface parking will be provided near each building, located on the east side, with vehicular access from Carter Street. The primary pedestrian entrance will also be located on Carter Street, leading residents into a ground-floor lobby that will include a mailroom, management offices, community room and other amenities. This community is designed to serve families and individuals seeking high-quality rental housing with modern amenities and thoughtfully planned open spaces.

Supporting Market Data for Senior Affordable Housing

Daly City Demographic & Income Overview

Population Trends

- Daly City's population has slightly declined from approximately 104,901 in 2020 to 99,833 by mid-2023, reflecting a –4.9% change [Census.gov](https://www.census.gov).

- In 2024, the estimate showed a modest rebound to 101,418, with an overall –3.5% decline from 2020 [Census.gov](#).

Senior Population (65+)

- Seniors make up a significant portion of the population—around 20.1% in 2023 [Census.gov](#).
- In concrete terms, that’s over 18,000 residents aged 65+ living in Daly City [Bay Area Census](#).

Household Income

- The median household income stands at approximately \$119,570 (2023 dollars) [Census.gov](#)
 - Per capita income is about \$48,219 [Census.gov](#).
-

Implications for Affordable Senior Housing Demand

- High senior population segment (20%) paired with modest population decline suggests a strong and stable base that could benefit from dedicated affordable senior housing.
- Relatively high median income indicates purchasing power, but also highlights that many middle- to lower-income seniors may still struggle with housing affordability—especially in a region with elevated home values and rents.
- Overall, these factors point to sustained demand for senior affordable housing in Daly City, particularly units aimed at residents between 15% and 60% AMI.

Supporting Market Data for Market Rate Housing

Average Rental Rates

- The average rent in Daly City is approximately \$2,700/month across all property types and bedroom sizes—\$95 lower than last year and \$100 lower month-over-month [Zillow](#).
- More specifically, one-bedroom units average around \$2,100/month, two-bedroom units average \$3,300/month, and studios come in at \$1,650/month [RentableRentCafe](#).

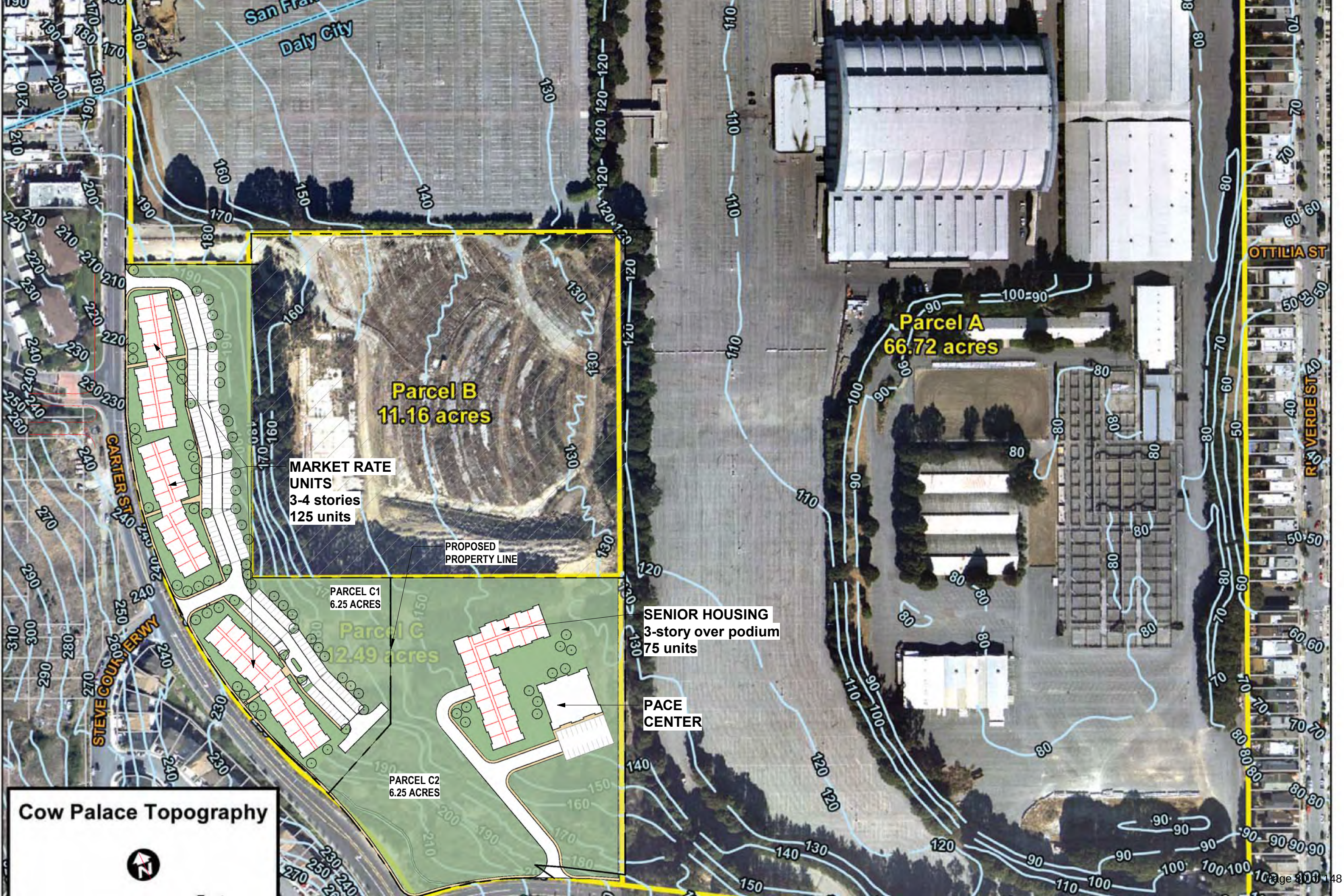
2. Apartment Size & Occupancy

- The typical rental apartment in Daly City spans about 642 square feet [RentCafe](#).
- Daly City’s rental vacancy rate is reported at 10%, which is relatively high and indicates some supply flexibility for renters [affordablehousingonline.com-www.affordablehousingonline.com](#).

3. Regional Rental Market Context

- Compared to San Francisco and other core Bay Area markets, Daly City remains less competitive—Northern Bay Area averages 7 renters per unit vs. 12 in tech-heavy Silicon Valley markets. Vacancy Rate in Daly City = 10% (moderately high).

Recognizing the critical importance of reliable market insights, our team will engage Novogradac & Company to prepare a comprehensive market study addressing both senior affordable housing and market-rate multifamily housing, should we be selected as the preferred developer for the Carter/Martin site in Daly City. Novogradac is a nationally recognized leader in housing and real estate market analysis, and their expertise will ensure the Agency has the most thorough, data-driven foundation to support the project's success



Cow Palace Topography









3

Team Members



Team Members

On the following pages please find information regarding our development and design team including team member resumes and an organizational chart for the proposed development.

HumanGood Affordable Housing: Affordable Housing Developer

Waterford Property Company: Market Rate Developer

HKIT Architects: Architect

The designated lead contact for the team is Peggy Lichthart, Development Director at Beacon Development Group, a HumanGood company.

PeggyL@beaconddevgroup.com

(310) 600-0237

Affordable Housing Leadership



Jennifer Kappen

Senior Vice President, Affordable Housing

With nearly 20 years of progressive experience in non-profit senior living organizations, Jennifer oversees HumanGood's affordable housing division across five states—more than 100 communities. She successfully collaborates in the development and execution of strategic organizational objectives and is committed to developing consistent, team-oriented departments that provide support to the affordable housing teams. Jennifer has been with HumanGood through its affiliation with Presby's Inspired Life since 2008. She was previously the Vice President of Finance and Risk Management in the organization. Jennifer received her Bachelor of Science in Business Administration from Shippensburg University.



Vidhi Anderson

Vice President, Development (East)

Vidhi has over 20 years of experience as a real estate developer. As the Vice President of Development at HumanGood, she oversees both the development of new senior housing communities, as well as the preservation of the organization's existing portfolio on the east coast. Vidhi was a recipient of the 'Pennsylvania Housing Pioneer' Award from the Pennsylvania Housing Finance Agency and sits on the boards of Philadelphia Housing Development Corporation, Regional Housing Legal Services, Pennsylvania Developer Council, and the Philadelphia Accelerator Fund. She received her Bachelor of Architecture from the School of Planning and Architecture, New Delhi, India, and her master's degree in City & Regional Planning with a concentration in Community and Economic Development from the University of Pennsylvania.

Affordable Housing Leadership



Teresa Ichsan

Vice President, Resident Services (East and West)

With 20 years of progressive experience in the non-profit, affordable housing and resident services sector, Teresa serves as the Vice President of Resident Services at HumanGood. In this role, she oversees the Resident Services Team for affordable housing, supporting residents in over 100 communities across five states. Teresa collaborates cross-departmentally with Development, Operations/Property Management, Human Resources and other teams to ensure compliance and the delivery of quality services. She joined HumanGood in 2024, bringing a wealth of knowledge and experience to the team. Teresa graduated cum laude with a Bachelor of Arts in Communication from San Francisco State University.



Brian Lloyd

Vice President, Beacon Development Group (West)

Brian has developed or is currently working on 40+ projects worth more than \$750 million for Beacon. He has primary responsibility for all third-party consulting projects and client relationships. He jointly manages the overall Beacon organization as well as supervising housing developers, development assistants, and construction managers. Brian has worked with most affordable housing funding sources, public and private, in Washington State: Historic and Low-Income Housing Tax Credits, taxable and tax-exempt bank loans, bridge funding, construction loans, and City, County and State funding. Prior to Beacon, Brian served as Vice President for Community Development Banking at Bank of America in Seattle, and as Project Manager for EAH Housing, one of the San Francisco Bay area's largest non-profit housing developers. Brian currently serves on the Board of the Housing Development Consortium and as the President of the Board from 2021–2022 and 2017–2018. From 2007 to 2014 he served on the Board of Capitol Hill Housing in Seattle. He holds a bachelor's degree in History and Global Studies from Pacific Lutheran University and a master's degree in Public Policy from the Kennedy School of Government at Harvard University.

Affordable Housing Leadership



Cindy Proctor

Vice President, Beacon Development Group (West)

As a member of the Executive Leadership Team, Cindy jointly oversees the overall development pipeline for the HumanGood Affordable Housing portfolio and Beacon client-based projects in a multi-state area. She provides direct supervision to development and asset management teams in Washington and California, as well as overseeing Beacon's key operational areas including organizational finance, compliance, and office support teams. Cindy has developed over 28+ projects worth over \$625+ million while at Beacon. She provides deep project management and oversight to her project development teams. Cindy has worked with a vast array of funding sources, public and private including: LIHTC and Historic Housing Tax Credits, taxable and tax-exempt financing. Prior to Beacon, she served as Manager of Housing Development at the Low-Income Housing Institute and Credit Review Analyst at Wells Fargo (fka as First Interstate Bank). Cindy is a past Planning Commissioner and currently serves on Governor Inslee's Affordable Housing Advisory Board. Her experience in both housing finance and policy groups allows for Beacon and HumanGood Affordable Housing to contribute thoughtful and strategic regional policy input.



Kendra Roberts

Vice President, Operations (East and West)

Kendra oversees operations in all HumanGood affordable housing communities. She maintains compliance across a regulatory diverse portfolio, facilitates and pursues new management contracts, and supervises a staff of over 150 team members. While supporting projects under construction, she is supporting an expansion of residential services and has been with HumanGood (previously Beacon Communities and American Baptist Homes of the West) since 2007. Kendra is the 2nd Vice Chairperson on the Housing California Board. She holds a Bachelor of Arts from Hampton University and a master's degree in Non-Profit Administration from the University of San Francisco.

For more information about HumanGood, visit
HumanGoodAffordableHousing.org



Beacon Development Group is an affordable housing consulting firm that works with nonprofits and housing authorities throughout the West Coast. We facilitate the funding, design, and construction of affordable housing developments for our clients, managing the entire development process from financing to construction to handing off the keys. Since 1999 Beacon has served thousands of people through the development of over 6,000 units in 100+ projects with a combined value of over \$1.4 billion dollars.

We believe that when all people and families have the security of an affordable home, our entire community benefits. We work collaboratively with clients across all building types and populations to conduct feasibility analysis, navigate and secure financing, structure projects to ensure healthy long-term performance, represent owners through the construction process, and hand over the keys to property management for lease-up and close-out. We have a long history of navigating public and private funding sources with our clients. As a result, we have an exceptional breadth and depth of experience that gets results.

In addition to consulting work, Beacon Development Group is a wholly-owned subsidiary of HumanGood and leads HumanGood Affordable Housing's real estate development efforts in Washington, Oregon, and California.

Beacon Staff

Beacon staff members are seasoned development professionals with a deep commitment to our clients and their projects. Relationships matter to us, so we foster a collaborative culture where we navigate the affordable housing development maze with clients, always focused on finding solutions through creative problem solving. Beacon's staff possess decades of affordable housing development experience with a range of project types from urban mixed-use transit orientated development (TOD) sites to historic preservation and rural development. Beacon is experienced with an array of funding sources including HOME, CDBG, HUD, City, County, State, and LIHTC.

Awards

We are honored to have received the following recognition:

- **Chuck Austin Place:** NAHRO Award of Excellence for Adaptive Reuse in Affordable Housing, 2023; Affordable Housing Finance Finalist, 2022
- **Filipino Community Village:** Senior Housing News Award for Affordable Housing, 2023
- **HopeWorks Station II:** LEED Platinum Certification, 2020; PCBC Golden Nugget Merit Award for Best Innovative Energy Design, 2020
- **Rotary Terrace Senior Housing:** Senior Housing News Architecture & Design Awards, 2019; AIA/Design for Aging Award of Merit, 2019; PCBC Golden Nugget Best Affordable Senior Housing Community Award of Merit, 2019
- **Plaza Roberto Maestas:** ULI Jack Kemp Award of Excellence, 2019; AIA/HUD Secretary's Housing and Community Design Award for Creating Community Connections, 2017; Affordable Housing Tax Credit Coalition's Charles L. Edson Tax Credit Excellence Awards: Honorable Mention in the Metropolitan/Urban category, 2017; PCBC's Golden Nugget Awards Award for Merit in Affordable Housing, 2017; Puget Sound Regional Council VISION 2040 award, 2017; Futurewise Livable Community Award for Equity & Environment, 2013
- **Beacon Development Group:** Impact Capital Community Partner of the Year Award, 2016; Washington State Housing Finance Commission Friend of Housing Award, 2014; Seattle Business Magazine's 100 Best Companies to Work For: Top 10 Small Firms, 2014; Affordable Housing Finance Magazine's Top 50 Affordable Housing Developers, 2007
- **Agnes Kehoe Place:** NAHRO Award of Merit for Community Development, 2013
- **Salishan Gardens:** Pacific Coast Builders Conference Gold Nugget Award of Merit, 2012
- **Valle Lindo Homes:** Energy Star Leadership in Housing, 2012
- **Pearl on Adams:** NAHRO Award of Excellence, 2011
- **Walton Place 2:** NAHRO Award of Excellence for Program Innovation in Community Revitalization, 2011
- **Kateri Court:** first Gold-Certified LEED Affordable Housing Project in Washington, 2008
- **Tepeyac Haven:** first Gold-Certified LEED for Homes Multi-Family Project in the nation, 2007

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (2005-Present)

Vice President

As a member of the Executive Leadership Team, Cindy provides organizational leadership and participates in strategic planning initiatives. She jointly oversees the overall development pipeline for the HumanGood Affordable Housing portfolio and Beacon client-based projects in a multi-state area. Cindy provides direct supervision to development and asset management teams in Washington, Oregon, and California, as well as overseeing Beacon's key day-to-day operations including organizational finance, business compliance, and office support teams. Cindy has worked with a vast array of funding sources, public and private: LIHTC and Historic Housing Tax Credits, taxable and tax-exempt financing. Her experience in both housing finance and policy groups allows for Beacon and HGAH to contribute thoughtful and strategic regional policy input.



PAST PROFESSIONAL EXPERIENCE

LOW INCOME HOUSING INSTITUTE (1998-2005)

Manager of Housing Development & Senior Housing Developer

Cindy oversaw production of 996 units of housing, valued at over \$100 million, while at LIHI. She served on the Senior Management Team. Cindy coordinated the WA Reinvestment Alliance, ensuring statewide compliance with the Community Reinvestment Act for 79 participating institutions.

WELLS FARGO fka FIRST INTERSTATE BANK (1984-1996)

Credit Review Analyst

Cindy provided loan reviews for commercial lending centers and financial and tax analysis for loan portfolios.

REPRESENTATIVE PROJECTS

OLIVE PLAZA APARTMENTS, Eugene, OR

Acquisition Rehab Preservation of 150 units of HUD Section 8 senior housing using Tax Exempt financing, 4% & Oregon State tax credits.

FREDERICK DOUGLAS HAYNES APARTMENTS, San Francisco, CA

Rehabilitation of 104 units of multi-family affordable housing with 4% tax credit and bond financing, using Income-Averaging.

CASTLE ARGYLE, Hollywood, CA

HumanGood Affordable Housing, substantial Rehabilitation and Seismic upgrade of 96-unit senior apartment.

PLAZA ROBERTO MAESTAS, Seattle, WA

El Centro de la Raza, mixed-use ETOD project with 112 new apartments for families; 7-classroom bilingual child development center, retail, banking and restaurant space.

WENATCHEE SUPPORTIVE HOUSING, Wenatchee, WA

Catholic Charities Housing Services, 67 new units for homeless families with children; 9% and 811 disabled.

EDUCATION & COMMUNITY ENGAGEMENT

GOVERNOR'S AFFORDABLE HOUSING ADVISORY BOARD (AHAB): Member, Mar 2017-2023

ENUMCLAW PLANNING COMMISSION: Member, 2015-2016

UW CASCADE EXECUTIVE MANAGEMENT PROGRAM



PEGGY LICHTHART

DEVELOPMENT DIRECTOR, NORTHERN CALIFORNIA

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (2018-Present)

Development Director, Northern California

Peggy manages the development pipeline and process for Beacon Development Group, with an emphasis on the HumanGood Affordable Housing portfolio in Northern California. Her responsibilities include all aspects of new business development, planning and development for projects, as well as the supervision of staff to housing developers and development associates. Peggy has developed or is currently working on 30+ affordable housing projects worth more than \$528 million in the western United States. Peggy has worked with public and private affordable housing funding sources: Low-Income Housing Tax Credits, taxable and tax-Exempt financing, City, County and State funding in multiple States.



PAST PROFESSIONAL EXPERIENCE

SRO HOUSING CORPORATION (2016-2017)

Vice President of Business Development

Peggy managed and developed SRO's new construction and rehabilitation projects and oversaw property management of 2,300 multi-family units of emergency, transitional and permanent supportive housing.

HIGHRIDGE COSTA HOUSING PARTNERS, LLC (2011-2016)

Development Project Manager

Highridge is one of the largest owners, operators and developers of affordable housing in the United States. Peggy managed all aspects of Highridge's project development including site acquisition, predevelopment, entitlements, design, financing and construction.

AIMCO CAPITAL, a subsidiary of AIMCO a publicly traded REIT (2002-2010)

Director of Transactions

Peggy was responsible for the US Western Region real estate affordable housing transactions for AIMCO Capital including acquisitions, dispositions, refinancing, 9% & 4% low-income housing tax credit projects and bonds.

REPRESENTATIVE PROJECTS

FREDERICK DOUGLAS HAYNES APARTMENTS, San Francisco, CA

Rehabilitation of 104 units of multi-family affordable housing with 4% tax credit and bond financing.

PANAMA HOTEL, Los Angeles, CA

Rehabilitation of 75 Permanent Supportive Housing units with 9% tax credits, City of LA and State of CA funds.

PERRIS STATION SENIOR APARTMENTS, Perris, CA

New construction of 84 senior units with 9% tax credits, City of Perris and State of CA funds.

HUNTERS POINT (4 projects), San Francisco, CA

Rehabilitation of 604 units of multi-family affordable housing with 4% tax credit and bond financing.

EDUCATION & COMMUNITY ENGAGEMENT

UNIVERSITY OF CALIFORNIA, LOS ANGELES: BA, Sociology

UNIVERSITY OF CALIFORNIA, LOS ANGELES: Professional Real Estate Certificate Program

SOUTHERN CALIFORNIA ASSOCIATION OF NON-PROFIT HOUSING: Member, 2016-Present



GEORGE SOUSOU

CONSTRUCTION MANAGEMENT DIRECTOR – CALIFORNIA

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (2016-Present)

Director of Construction Management - CA, California Office

On behalf of HumanGood Affordable Housing, George oversees construction of all California projects, from complex new urban construction to occupied acquisition rehabilitations. He is particularly adept at budget control and cost reduction on projects, driving unique solutions that maximize both creativity and resources. He reviews and provides feedback on design, cost estimates, and third-party reports, and monitors construction budgets and schedules for clients to ensure buildings that are high quality and under budget.

PAST PROFESSIONAL EXPERIENCE

HALLMARK GROUP/HELLO HOUSING (2007-2016)

Senior Construction Manager

George oversaw design, permitting and construction on ten new construction projects and 50 remodel projects for residential facilities for people with developmental disabilities in the Bay Area. He worked closely with clients throughout design development and ensured that all state licensing and green certification requirements were met. George supervised and coordinated architects, engineers and sub-consultants, providing detailed review of all plans, specifications and permit sets to ensure quality control and constructability. He worked with general contractors to deliver projects on time and under budget.

PACIFIC BUILDING, INC. (2000-2007)

Development Project Manager

George handled all business development and operational efforts, prepared detailed competitive bids for new and existing clients, negotiated contracts, created and monitored construction schedules and oversaw subcontractor negotiation and administration for a variety of large commercial and retail construction projects in California.



REPRESENTATIVE PROJECTS

MORGAN HILL SENIOR HOUSING, Morgan Hill, CA

HumanGood Affordable Housing & Sunnyvale Life Inc. partnership of an 83-unit new construction affordable housing apartment building serving low-income and special need seniors.

HUMANGOOD PORTFOLIO SOLAR INITIATIVE, CA

Leading effort in installation of PV solar system at 22 HumanGood Affordable Housing communities under the Solar of Multifamily Affordable Housing (SOMAH) program in partnership with SunRun.

HUMANGOOD RAD FOR PRAC PORTFOLIO, CA

Lead CM on HumanGood Affordable Housing Property improvements under new HUD loan conversion program.

EDUCATION & COMMUNITY ENGAGEMENT

BUILD IT GREEN Certified Green Point Advisor and Certified Green Point Rater

USBGC LEED Green Associate

CALIFORNIA CONTRACTORS STATE LICENSE BOARD General B License



MATT ALMONTE

HOUSING DEVELOPER

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (September 2023-present)

Housing Developer

Matt leads and coordinates all stages of affordable housing development including feasibility analysis, pre-development, design, project financing, construction, and project close-out for multiple projects. He works closely with all project partners to understand and promote their vision while collaborating with all members of the project team, including contractors, architects, funders, and the BDG team to build a successful project.

PAST PROFESSIONAL EXPERIENCE

EAST BAY ASIAN LOCAL DEVELOPMENT CORPORATION (2021-2023)

Project Manager

Matt led all aspects of development, working closely with various federal, state, and local funders to build quality affordable housing in Oakland, CA.

BEACON DEVELOPMENT GROUP (2019-2021)

Associate Housing Developer

Matt assisted housing developers in various aspects of development from funding applications, loan due diligence, financial closings, and construction draw preparation.

REPRESENTATIVE PROJECTS

VISTA SENIOR HOUSING, Vista, CA

New construction of 83 units of multi-family low-income housing in partnership with Vista Community Clinic

ROTARY GARDENS, South San Francisco, CA

New Construction of 80 units of senior affordable housing in partnership with the Rotarians of South San Francisco

OLIVE PLAZA APARTMENTS, Eugene, OR

Rehabilitation of 150 units of senior affordable housing with 4% tax credit and bond financing.

EDUCATION & COMMUNITY ENGAGEMENT

CALIFORNIA STATE UNIVERSITY, EAST BAY: BS, Accounting

NATIONAL DEVELOPMENT COUNCIL: Rental Housing Development Finance Certification,
Computer Spreadsheet Analysis for Rental Housing Certification

LOCAL INITIATIVES SUPPORT CORPORATION CALIFORNIA: Housing Development Training
Institute 2023-2024 Cohort





MADELINE LIVINGSTONE

DEVELOPMENT ASSOCIATE

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (May 2022-Present)

Development Associate

Madeline is an active member of the development team, supporting funding applications, closings, construction draws, and ongoing coordination for multiple projects. Madeline primarily focuses on HumanGood Affordable Housing projects in California.

PAST PROFESSIONAL EXPERIENCE

BEACON DEVELOPMENT GROUP (2021-2022)

Internship

Madeline assisted the California development team in administrative tasks, project specific work and research.

UC BERKELEY CENTER FOR COMMUNITY INNOVATION (2020)

Research Assistant

Madeline lead fieldwork expeditions to understand the problems and identify solutions around pressing housing, land use and urban sustainability issues. Madeline collected, synthesized, and mapped data.

REPRESENTATIVE PROJECTS

MORGAN HILL SENIOR HOUSING, Morgan Hill, CA

HumanGood Affordable Housing, 82 new construction apartments of senior affordable housing.

HUMANGOOD AFFORDABLE HOUSING RAD FOR PRAC PORTFOLIO, CA

HumanGood Affordable Housing, RAD for PRAC portfolio preservation of senior affordable housing properties.

EDUCATION & COMMUNITY ENGAGEMENT

UNIVERSITY OF CALIFORNIA, BERKELEY: B.A. in Geography

NATIONAL DEVELOPMENT COUNCIL: Rental Housing Development Finance Professional Certification Program

CALIFORNIA HOUSING PARTNERSHIP: Tax Exempt Bonds 101 Training

NOVOGRADAC & COMPANY: LIHTC 101 Course

PLANNED PARENTHOOD: Action Fund Representative

YWCA: English in Action Volunteer





JUSTIN MACABENTA

CONSTRUCTION TECH I

CURRENT ROLES AND RESPONSIBILITIES

BEACON DEVELOPMENT GROUP (Jan 2022-Present) **Construction Tech I**

Justin plays a key role in supporting the Construction Management team in California and Washington with all areas of construction oversight and project data management. His responsibilities include communication and coordination with third party vendors, AIA contract finalization, tracking green energy sustainability and utility efficiency. Justin primarily focuses on HumanGood Affordable Housing portfolio projects.

PAST PROFESSIONAL EXPERIENCE

BEACON DEVELOPMENT GROUP (2019-2021) **Associate Housing Developer**

Justin supported the development and construction management team in California and Washington in all areas of construction oversight, project data and construction draw management. He worked collaboratively with asset management and engages with property operations and vendors for property maintenance and cost savings issues.

Administrative Assistant

Justin assisted and supported the California development team in all aspects of project development planning to close out, client reporting, document management, utility tracking and marketing project work.



REPRESENTATIVE PROJECTS

MORGAN HILL SENIOR HOUSING, Morgan Hill, CA

HumanGood Affordable Housing & Sunnyvale Life, Inc. partnership of an 83-unit new construction affordable housing apartment building serving low-income and special need seniors.

CLARK TERRACE, Norco, CA

Rehabilitation of an 80-unit senior HUD PRAC project, utilizing the HUD RAD program.

OLIVE PLAZA, Eugene, OR

Rehabilitation of a 150-unit senior housing apartment building serving low-income and special need seniors.

HUMANGOOD PORTFOLIO SOLAR INITIATIVE, CA

Installation of photovoltaic solar system at 22 HumanGood Affordable Housing communities under the Solar of Multifamily Affordable Housing (SOMAH) program in partnership with SunRun.

EDUCATION & COMMUNITY ENGAGEMENT

KELLER GRADUATE SCHOOL OF MANAGEMENT: Master of Project Management

SAN JOSE STATE UNIVERSITY: Bachelor of Science, Health Science

BUILD IT GREEN: Certified Green Building Professional

Development Team

Waterford Property Company



SEAN RAWSON

Co-Founder | Head of Acquisitions and Development

The Co-Founder of Waterford Property Company, Sean Rawson, is a leader in the multifamily residential industry. Over the course of his career, Mr. Rawson has sourced, entitled and developed over \$2 billion in real estate transactions. Since forming Waterford in 2013, Mr. Rawson has acquired and developed nearly 8,000 residential units in California.

Prior to forming Waterford Property Company and its predecessor companies, Mr. Rawson was the Southern California President for St. Anton Partners, a leading privately-owned multifamily development company where he led the firm's expansion into Southern California.



JOHN DRACHMAN

Co-Founder | Head of Capital Markets

John Drachman is responsible for the firm's commercial division and all capital raising activities. Since starting his predecessor firm, Stillwater Investment Group, in 2014, Mr. Drachman has acquired and been a partner in over \$2.8 billion of office, retail, and apartment assets in Southern California. To acquire these assets, Mr. Drachman has created and developed joint venture partnerships with a variety of different capital sources including high net-worth private investors, family offices, and institutional equity funds while leveraging his strong relationships within the brokerage community to source opportunities. Prior to founding Waterford, Mr. Drachman was a Vice President with Greenlaw Partners in Orange County, where he led the acquisitions and asset management efforts.



OREN HILLEL

Director of Development

As Director of Development, Oren Hillel oversees the company's real estate development strategies, focused on spearheading ground-up development projects, both market rate and affordable housing. This includes identifying and securing development sites, working together with municipalities for all project approvals, leading design and permitting, as well as overseeing construction execution.

Prior to joining Waterford, Mr. Hillel worked at Greystar, one of the largest international real estate developers and managers, with more than \$50B in assets under management. Mr. Hillel was a key member of the greater Los Angeles development team, leading both market rate multifamily and student housing projects from acquisition to completion.

Development Team

Waterford Property Company



AARON FANWICK

Government Affairs

Aaron brings extensive experience from his legal background in both the public and private sectors. Most recently, Aaron worked as the Director of Intergovernmental affairs, legislation and advocacy for the Office of Los Angeles County Assessor Jeff Prang – where he led property tax legislation and rulemaking for the office and the California Assessors' Association. Previously, Aaron worked on Capitol Hill for Sen. Levin Permanent Subcommittee on Investigations investigating fraud and tax policy and practices. Before moving to Los Angeles, Aaron spent 3 years with the United States Department of Justice litigating Civil Fraud claims against mortgage lenders and underwriters. Aarons unique background and skillset bring a valuable perspective and understanding of the legal, policy and political landscape to the Waterford team.



PHIL CHRISTIAN

Director of Asset Management

Phil Christian is responsible for the growth strategy and business plan implementation of Waterford Property Company's Residential portfolio. This includes asset management and all operations of resident management, construction management and accounting.

Previously, Mr. Christian was a real estate broker with CBRE's Occupier Practice Group with a focus on corporate occupier clients in the Western Region. Prior to joining CBRE, Mr. Christian was recruited by former US Ambassador George L. Argyros and served as his Executive Aide before being promoted to Commercial Leasing Director and Regional Property Supervisor, overseeing Arnel & Affiliates' apartment portfolio. Mr. Christian is a graduate of Chapman University where he played NCAA Football and has served on the Alumni Board of Directors. He is a former member of the Orange County Lincoln Club and actively participates in local politics.



COLE TAIT

Associate

As an Associate, Cole Tait leverages four years of real estate experience to drive execution within Waterford's asset management and acquisitions teams. Mr. Tait specializes in underwriting processes, conducting market analysis, and constructing reports to optimize asset performance throughout Waterford's portfolio.



CHRISTOPHE LAVERNE
AIA, LEED AP, NCARB
Principal-in-Charge

Christophe has over 20 years of design, project management, and construction administration experience for a variety of project types focused on senior living communities, multi-family residential communities, municipal projects, and an array of public facilities. His approach to architectural design is rooted in meaningful, sustainable, and healthful experiences for users that balances nature and the architectural built environment.

He serves as Co-Chair for the AIA San Francisco Chapter's Design for Aging Committee, where he leads interdisciplinary discussions on topics addressing the challenges and opportunities of design for aging and how architecture can thoughtfully and effectively support the quality of life for our aging society. Christophe is also a member of the AIA National Design for Aging Community.

EDUCATION

- Master of Arts, Architecture, University of Oregon
- Bachelor of Arts, Marketing, University of the Pacific

REGISTRATIONS, ACCREDITATIONS & AFFILIATIONS

- California Licensed Architect, Lic. # C 30046
- LEED Accredited Professional
- NCARB Certification
- Member, American Institute of Architects
- Member, Center for Health Design

SELECTED PROFESSIONAL ACTIVITIES

- Panelist, "Smart Senior Living 2.0," Environments for Aging National Conference, April 2025
- Panelist, "Creating Home for Seniors in Affordable Housing," Environments for Aging National Conference, April 2024
- Panelist, "Bay Area Region: Design Considerations for the Future," LeadingAge California, March 2024
- Panelist, One Workplace Senior Living Roundtable, December 2023
- Panelist, "Addressing the Need for Affordable Housing," BisNow East Bay Multifamily Conference, June 2023

SELECTED EXPERIENCE

Bay Area Rescue Mission

- Capital Needs Assessment, Richmond

Beacon Development Group/HumanGood

- Life's Garden Renovation, Sunnyvale (208 units)
- Morgan Hill Senior Community, Morgan Hill (82 units)
- Rotary Gardens, South San Francisco (83 units)
- Rotary Terrace, South San Francisco (81 units)

Belmont Village Senior Living

- Belmont Village, Albany (175 units)
- Belmont Village, Los Gatos (152 units)
- Belmont Village, San Ramon (177 units)

Christian Church Homes

- Don Stump Southlake Tower Renovation, Oakland (130 units)

Clearwater Living

- Clearwater at Windsor, Windsor (246 units)

EAH Housing

- Nevin Plaza Rehabilitation, Richmond (138 Units)
- Nevin Plaza Senior Housing, Richmond (85 units)

Episcopal Community Services

- 1000 Sutter, San Francisco (232 units)
- Bishop Swing Housing Hub Interior Renovation, San Francisco

Hines + Clearwater Living

- Huntington Beach Senior Living, Huntington Beach (202 units)

InnovAge

- PACE Center, Sacramento

Kendal

- Enso Village, Healdsburg (221 units)

Mercy Housing California

- Dorothy Day Senior Community Rehabilitation, San Francisco (100 units)
- Vera Haile Senior Housing, San Francisco (90 units)

MidPen Housing

- Donner Lofts, San Jose (102 units)

North East Medical Services

- 2323 Sacramento Street RCFE Renovation, San Francisco (22 units)

Related California

- Northgate Terrace Renovation, Oakland (201 units)

Satellite Affordable Housing Associates

- Grayson Apartments, Berkeley (23 units)

Spirit Living Group

- Elegance Berkeley, Berkeley (96 units)



GORDANA GRAVES
Project Manager

Gordana is a versatile Project Manager with over 20 years of experience in the residential, public, and religious sectors. She excels at leading complex projects from early concept studies through construction and completion. Gordana has executed over 80 concept design feasibility studies/master plans and has guided 13 projects through the site/building permitting process at the San Francisco City Planning & Building Department.

EDUCATION

- Master of Architecture, University of Belgrade, Serbia

SELECTED EXPERIENCE

980 Folsom LLC

- 980 Folsom, San Francisco (32 units) *

Bay Area Rescue Mission

- Capital Needs Assessment, Richmond

Beacon Development Group/HumanGood

- Rotary Gardens, South San Francisco (83 units)

Clearwater Living

- Clearwater at Windsor, Windsor (246 units)

Focus Realty

- 923 Market Street Mixed-Use, San Francisco (6 units) *

EAH Housing

- Nevin Plaza Rehabilitation, Richmond (138 Units)
- Nevin Plaza Senior Housing, Richmond (85 units)

Exp Realty

- 36-50 San Bruno Avenue Senior Housing, Brisbane (16 units) *

North East Medical Services

- 2323 Sacramento Street RCFE Renovation, San Francisco (39 units)

* Project prior to HKIT



KEN LIN
AIA, NCARB, Fitwel Amb.,
LEED Green Associate
Project Architect

Ken is a Project Architect with specialized skills in design technology, including Revit, Rhino, Grasshopper, Lumion, AutoCAD, Dynamo, and VBScript. In his role, he works collaboratively with the team to define the project parameters, determine the design direction, and manage the program and budget through creative design solutions.

EDUCATION

- Master of Architecture, California College of the Arts
- Master of Arts, Computer Science, Queens College
- Master of Science, Biostatistics, National Taiwan University
- Bachelor of Science in Public Health, National Taiwan University

REGISTRATIONS, ACCREDITATIONS & AFFILIATIONS

- California Licensed Architect, Lic. # C 36998
- LEED Green Associate
- NCARB Certified
- Fitwel Ambassador
- Cal OES Certification
- Member, American Institute of Architects

SELECTED EXPERIENCE

Beacon Development Group/HumanGood

- Morgan Hill Senior Community, Morgan Hill (82 units)
- Rotary Gardens, South San Francisco (83 units)

Belmont Village Senior Living

- Belmont Village, San Ramon (177 units)

Clearwater Living

- Clearwater at Windsor, Windsor (246 units)

EAH Housing

- Nevin Plaza Rehabilitation, Richmond (138 units)

Kendal

- Enso Village, Healdsburg (221 units)

Episcopal Community Services

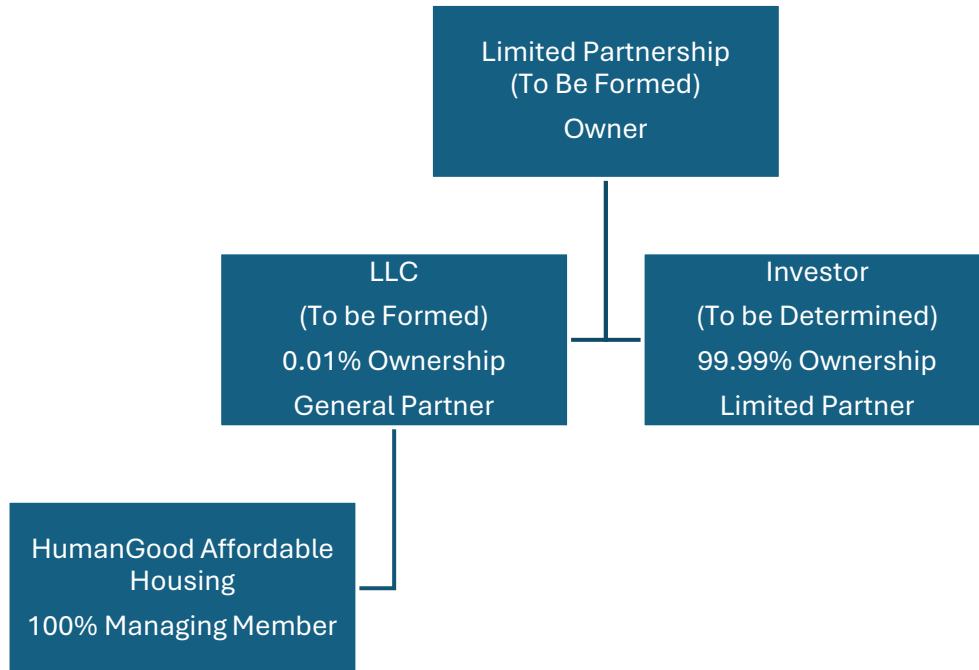
- 1000 Sutter, San Francisco (232 units)

North East Medical Services

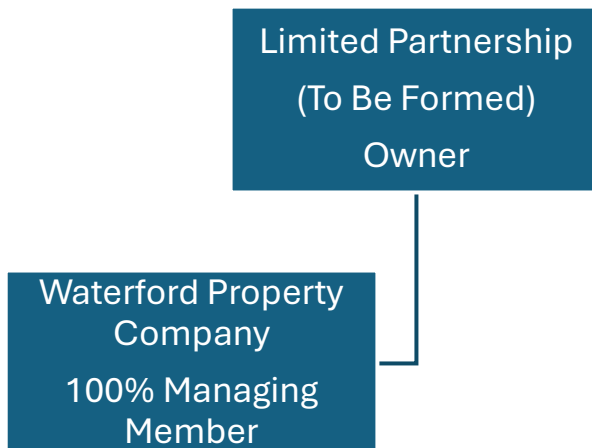
- 2323 Sacramento Street RCFE Renovation, San Francisco (39 units)

Organizational Chart

Senior Affordable Housing Organizational Chart:



Market-Rate Housing Organizational Chart:



4

Relevant Project Experience



human good

AFFORDABLE HOUSING



HumanGood was founded on the belief that everyone should have the opportunity to live life with enthusiasm, confidence and security, regardless of physical, social or economic circumstances.



Our Footprint

HumanGood Affordable Housing operates across California, Delaware, Pennsylvania, Oregon and Washington.

Communities: **100 owned and/or managed**

Total Assets: **\$756 million**

Annual Revenue: **\$65 million**

Residents served: **9,000+**





Overview

HumanGood Affordable Housing focuses on meeting the housing and services needs of seniors with limited means. We own and/or manage 100 affordable senior housing communities across California, Delaware, Pennsylvania, Oregon and Washington. HumanGood is focused on raising the bar for environmental and program design, innovative supportive services and ever-improving quality standards. Our property management philosophy is centered on diligent fiscal and asset management; we structure projects to ensure healthy long-term performance.

HumanGood Affordable Housing is a separate 501(c)(3) corporation that is a subsidiary of its parent company, HumanGood.



We specialize in senior housing. HumanGood Affordable Housing develops and manages a growing portfolio of 100 Affordable Housing communities. In addition to managing its own properties, HumanGood Affordable Housing provides fee management, development, consulting and training services, and asset management.

Strict adherence to regulatory compliance and ongoing professional training means that the HumanGood Affordable Housing team is well prepared to communicate with and serve our senior residents. A customized resident services plan is designed for each property according to its environment and demographic needs. Each HumanGood Affordable Housing team member is thoroughly familiar with Fair Housing laws and lender requirements for each community in order to ensure total compliance with the letter of the law as well as the spirit of the law.

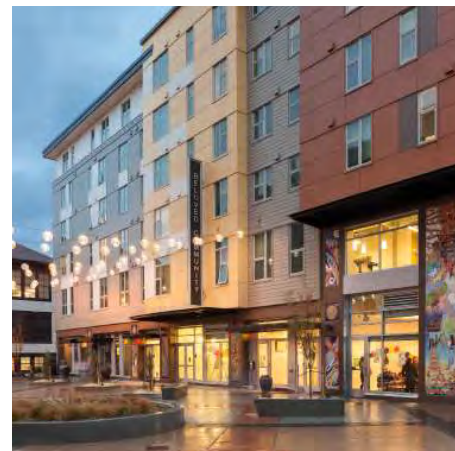
Accurate and timely financial reporting has been essential to HumanGood Affordable Housing's successful property management. HumanGood Affordable Housing has been highly regarded by non-profit non-affiliate Board of Directors as well as partner funding agencies for the organization's ability to ensure that financial operations are sound, project operating budgets are realistic, financial expectations are being met, and physical property conditions are being maintained.

**Qualifications
and experience
in low income
senior housing
management**

Development

Beacon Development Group, a wholly-owned subsidiary of HumanGood, leads HumanGood Affordable Housing's real estate development efforts. Beacon Development Group manages the entire development process from concept to financing to construction to handing off the keys to property management for lease-up and close-out.

In addition to leading the development of HumanGood communities, Beacon Development Group provides development consulting services to non-profits and housing authorities across the West Coast. Beacon's staff possess decades of affordable housing development experience with a range of project types from urban mixed-use transit orientated development (TOD) sites to historic preservation and rural development. Beacon is experienced with an array of funding sources including HOME, CDBG, HUD, City, County, State and LIHTC. HumanGood and Beacon's corporate offices are located in Pleasanton, California; Glendale, California; Seattle, Washington; and Lafayette Hill, Pennsylvania.



The Pearl on Oyster Bay



Rotary Terrace



Resident Services

HumanGood currently employs Resident Service Coordinators at the majority of its 100 affordable housing communities. The prime mandate for the Resident Services team is to create interlocking services that transforms basic life enrichment activities into a solid infrastructure that enhances wellness and supports functional independence of our residents. We do this by continuing to seek out and expand our partnerships with other affordable housing entities, county providers, community-based providers, educational institutions and health care providers. This allows us to continue to develop new approaches and resources to address our residents' needs.

HumanGood Affordable Housing Communities

HUMANGOOD WEST

Adda and Paul Safran
Senior Housing
Venice, Calif.

Allen Temple Arms I
Oakland, Calif.

Allen Temple Arms II
Oakland, Calif.

Allen Temple Gardens
Oakland, Calif.

Allen Temple Manor
Oakland, Calif.

Andres Duarte Terrace
Duarte, Calif.

Andres Duarte Terrace II
Duarte, Calif.

Broadmoor Plaza
San Leandro, Calif.

Canterbury Village
Santa Clarita, Calif.

Casa de La Paloma
Glendale, Calif.

Casa de la Vista
Redlands, Calif.

Castle Argyle
Los Angeles, Calif.

Clark Terrace
Norco, Calif.

Covenant Manor
Long Beach, Calif.

El Bethel Arms
San Francisco, Calif.

El Bethel Terrace
San Francisco, Calif.

Ethiopian Village
Seattle, Wash.

Fern Lodge
Redlands, Calif.

Filipino Community
Village
Seattle, Wash.

Fredrick Douglas Haynes
Gardens Apts.
San Francisco, Calif.

George McDonald Court
Los Angeles, Calif.

Hadley Villas
La Quinta, Calif.

Harbor View Manor
Tacoma, Wash.

Hillcrest Gardens—Daly
City
Daly City, Calif.

Irene Cooper Terrace
Oakland, Calif.

J.L. Richard Terrace
Oakland, Calif.

Judson Terrace Homes
San Luis Obispo, Calif.

Judson Terrace Lodge
San Luis Obispo, Calif.

Kelly Ridge
South Lake Tahoe, Calif.

LC Hotchkiss Terrace
Clovis, Calif.

Life's Garden
Sunnyvale, Calif.

Lil Jackson Senior
Community
Oceanside, Calif.

Lomita Manor
Lomita, Calif.

Morgan Hill Senior
Housing
Morgan Hill, Calif.

Mount Rubidoux Manor
Riverside, Calif.

Mountain Vistas
Redding, Calif.

Mountain Vistas II
Redding, Calif.

Northaven West
Seattle, Washington

Oak Knolls Haven
Santa Maria, Calif.

Olive Plaza Apartments
Eugene, Oregon

Pacific Meadows
Carmel, Calif.

Palmer House
Glendale, Calif.

Park Paseo
Glendale, Calif.

Rose View Terrace
Clovis, Calif.

Rosewood Court
Pasadena, Calif.

Rotary Plaza
So. San Francisco, Calif.

Rotary Terrace
So. San Francisco, Calif.

Royal Vista Terrace
Duarte, Calif.

Salishan Gardens
Tacoma, Wash.

Shepherd's Garden
Lynnwood, Wash.

Sierra Gateway
Senior Residence
Fresno, Calif.

Sierra Gateway
Senior Residence II
Fresno, Calif.

Sojourner Truth Manor
Oakland, Calif.

Sun Tower
Yakima, Wash.

Sycamore Terrace
Upland, Calif.

Tahoe Senior Plaza
So. Lake Tahoe, Calif.

The Gardens
Glendale Calif.

The Otto Gruber House
Glendale, Calif.

The Pearl on Oyster Bay
Bremerton, Wash.

Three Rivers Village
Richland, Wash.

Tower Park
Modesto, Calif.

Valley Vista
San Ramon, Calif.

Westminster Court
Bell Gardens, Calif.

William C. Arthur
Terrace
Corona, Calif.

HUMANGOOD EAST

Ann Thomas Presbyterian
Apartments
Philadelphia, Pa.

Bensalem Presbyterian
Apartments
Bensalem, Pa.

Cantrell Place
Philadelphia, Pa.

Casa Carmen Aponte
Philadelphia, Pa.

Community House
Philadelphia, Pa.

Grace Court
Yeadon, Pa.

Greenway Presbyterian
Apartments
Philadelphia, Pa.

Interfaith House in
Germantown
Philadelphia, Pa.

Jackson Place
Philadelphia, Pa.

Janney Apartments
Philadelphia, Pa.

Lindley Court Apartments
Philadelphia, Pa.

Los Jardines
Wilmington, Del.

Mantua Presbyterian
Apartments
Philadelphia, Pa.

Maple Village
Philadelphia, Pa.

Martha A. Lang Senior
Cyber Village
Philadelphia, Pa.

Mary Field Presbyterian
Apartments
Philadelphia, Pa.

Morrisville Presbyterian
Apartments
Morrisville, Pa.

Nativity BVM
Philadelphia, Pa.

Neumann Senior
Housing
Philadelphia, Pa.

Old City Presbyterian
Apartments
Philadelphia, Pa.

On Lok House
Philadelphia, Pa.

Paschall Senior Housing
Philadelphia, Pa.

Pensdale Apartments
Philadelphia, Pa.

Pensdale II
Philadelphia, Pa.

Reed Street Presbyterian
Apartments
Philadelphia, Pa.

Riverside Presbyterian
Apartments
Philadelphia, Pa.

Salba Apartments
Jenkintown, Pa.

Scottish Rite House
Philadelphia, Pa.

Scottish Rite Tower
Philadelphia, Pa.

St. Francis Villa
Philadelphia, Pa.

St. Rita Place
Philadelphia, Pa.

St. John Neumann Place
Philadelphia, Pa.

St. John Neumann Place II
Philadelphia, Pa.

Tioga Presbyterian
Apartments
Philadelphia, Pa.

Witherspoon Senior
Apartments
Philadelphia, Pa.

Wynnefield Place
Apartments
Philadelphia, Pa.

HumanGood Affordable Housing Communities



For more information, please visit
HumanGood.org

HumanGood Affordable Housing Detailed List of Real Estate Owned and Operated

Title	Legal Name	Owned/Managed	Location: Street	Location: City	State	Zip Code	Community Code	# of units	Year Built	# of Floors	Funding Type
Adda and Paul Safran Senior Housing	Venice Senior Housing Corporation	Owned	151 Ocean Front Walk	Venice	CA	90291	APS	64	2003	4	HUD 202/PRAC
Allen Temple Arms 1	Allen Temple Dev. Corp.	Managed	8135 International Blvd	Oakland	CA	94621	AT1	76	1981	3	HUD 202/8
Allen Temple Arms II	Allen Temple Dev. Corp. No. 2	Managed	8135 International Blvd	Oakland	CA	94621	AT2	51	1988	3	HUD 202/8
Allen Temple Gardens	Allen Temple Housing Corporation III	Managed	10121 International Blvd	Oakland	CA	94603	ATG	50	2001	3	HUD 202/PRAC
Allen Temple Manor	Allen Temple Housing Corporation IV	Managed	7607 International Blvd	Oakland	CA	94621	ATM	24	2002	4	HUD 811/PRAC
Andres Duarte Terrace	Andres Duarte Terrace	Owned	1730 Huntington Dr	Duarte	CA	91010	AD1	80	2006	4	HUD 202/PRAC
Andres Duarte Terrace II	Andres Duarte Terrace II LLC	Owned	1700 Huntington Dr	Duarte	CA	91010	AD2	43	2015	4	HUD/LIHTC
Ann Thomas Presbyterian Apartments	Presbyterian Apts. At 58th St.	Owned	2000 S 58th St	Philadelphia	PA	19143	ATH	75	1990	6	HUD 202/8
Bensalem Presbyterian Apartments	Bensalem Senior Apts., LP	Owned	1900 Byberry Rd	Bensalem	PA	19020	BST	53	2000	3	LIHTC
Broadmoor Plaza	San Leandro Senior Housing, Inc.	Owned	232 E 14th St	San Leandro	CA	94577	BPZ	60	2004	3	HUD 202/PRAC
Canterbury Village	Canterbury Village Retirement Corporation	Owned	23420 Avenida Rotella	Santa Clarita	CA	91355	CBL	64	1996		HUD 202/PRAC
Cantrell Place	Cantrell Place, LP	Owned	455 Cantrell St	Philadelphia	PA	19148	CPT	61	1996	4	LIHTC
Casa Carmen Aponte	Norris Square Senior Housing, Inc.	Managed	2121 N Howard St	Philadelphia	PA	19122	CCH	35	1999	5	HUD 202/PRAC
Casa de la Paloma	Casa de La Paloma Inc	Owned	133 S Kenwood St	Glendale	CA	91205	CDP	167	1979	9	HUD/LIHTC
Casa de la Vista	Redlands Senior Housing, Inc.	Owned	686 E Redlands Blvd	San Bernardino	CA	92373	CDV	75	1990	3	HUD 202/8
Castle Argyle	Castle Argyle LLC	Owned	1919 Argyle Ave	Los Angeles	CA	90068	CAL	96	1928		HUD/LIHTC
Clark Terrace	Clark Terrace LP	Owned	2660 Clark Ave	Norco	California	92860	CT1	80	2024		HUD/LIHTC
Community House	Community Renaissance Alliance, Inc.	Managed	5501 N 11th St	Philadelphia	PA	19141	CHH	73	1970	14	HUD 202/PRAC
Covenant Manor	Covenant Manor LP	Owned	600 E 4th St	Long Beach	CA	90802	CVM	100	1984	11	HUD/LIHTC
El Bethel Arms	El Bethel Arms, Inc.	Managed	1355 Golden Gate Ave	San Francisco	CA	94115	EBA	257	1974		HUD 236/8
El Bethel Terrace	El Bethel Terrace, Inc.	Managed	1099 Fillmore St	San Francisco	CA	94115	EBT	100			HUD 236/8
Ethiopian Village	Ethiopian Village LLLP	Owned	8323 Rainier Ave S	Seattle	WA	98118	EVL	89	2022	4	LIHTC
Fern Lodge	Redlands Senior Housing Two	Owned	460 Fern Ave	Redlands	CA	92373	FLG	62	2000	3	HUD 202/PRAC
Filipino Community Village	Filipino Community Village LLLP	Owned	5727 37th Ave S	Seattle	WA	98118	FCV	95	2021	5	LIHTC
Frederick Douglas Haynes Gardens Apartments	Third Baptist Gardens, Incorporated	Managed	1049 Golden Gate Ave	San Francisco	CA	94115	FDL	104		4	HUD/LIHTC
George McDonald Court	Bandera Senior Housing Corporation	Owned	1800 E 92nd St	Los Angeles	CA	90002	GMC	61	2000	3	HUD 202/PRAC
Grace Court	Grace Court, Inc.	Owned	550 S Lansdowne Ave	Lansdowne	PA	19050	GCH	100	1988	3	HUD 202/8
Hadley Villas	Senior Affordable Housing Corporation # 3	Owned	78875 47th Ave	La Quinta	CA	92253	HVS	80	2004	1	HUD 202/PRAC
Harbor View Manor	Harborview Manor LLLP*	Owned	919 Fawcett Ave	Tacoma	WA	98402	HVM	169	1970	12	HUD/LIHTC
Hillcrest Gardens	Hillcrest Senior Housing Corporation	Owned	35 Hillcrest Dr	Daly City	CA	94014	HGD	40	2008	4	HUD 202/PRAC
Interfaith House in Germantown	Germantown Interfaith Housing, Inc	Owned	18 W Chelten Ave	Philadelphia	PA	19144	GTH	95	1915	12	HUD 202/8
Irene Cooper Terrace	Evergreen Annex Inc.	Managed	1218 2nd Ave	Oakland	CA	94606	ICT	40		4	HUD 202/PRAC
Jackson Place	South Phila. Presbyterian Apts.	Owned	501 Jackson St	Philadelphia	PA	19148	JPH	66	2004	5	HUD 202/PRAC
Janney Apartments	Janney Street Apartments LP	Owned	2855 Janney St	Philadelphia	Pennsylvania	19134	JST	47	2024	4	HUD/LIHTC
JL Richard Terrace	Evergreen Terrace Housing Corp.	Managed	250 E 12th St	Oakland	California	94606	JLR	80		5	HUD 202/8
Judson Terrace Homes	Judson Terrace Homes Senior Housing, LP	Owned	3000 Augusta St	San Luis Obispo	CA	93401	JHL	107	1970	2	HUD 202/8
Judson Terrace Lodge	Judson Terrace Lodge, Inc	Owned	3042 Augusta St	San Luis Obispo	CA	93401	JTL	32	2003	3	HUD/LIHTC
Kelly Ridge	Tahoe Senior Housing II, LP*	Owned	1447 Herbert Ave	South Lake Tahoe	CA	96150	KRG	33	2009	2	LIHTC
L.C. Hotchkiss Terrace	LC Hotchkiss Terrace	Owned	51 Barstow Ave	Clovis	CA	93612	LHT	75	2005	3	HUD 202/PRAC
Life's Gardens	Sunnyvale Life LP	Managed	450 Old San Francisco Rd	Sunnyvale	CA	94086	LGN	208	1976	2	HUD/LIHTC
Lil Jackson Senior Community	Lil Jackson Senior Community	Owned	3512 Lake Blvd	Oceanside	CA	92056	LJS	80	2011		HUD 202/PRAC
Lindley Court	Lindley Apartments LP	Managed	1300 Lindley Ave	Philadelphia	PA	19141	LPT	48	2017	4	LIHTC
Lomita Manor	Lomita Manor	Managed	24925 Walnut St	Lomita	California	90717	LOM	78	1985	3	HUD 202/8
Los Jardines	Los Jardines Inc.	Managed	1000 W 5th St	Wilmington	DE	19805	LJH	24	2005	4	HUD 202/PRAC
Makemie Court	Makemie Court L.P.	Owned	554 S Lansdowne Ave	Yeadon	PA	19050	MCT	44	2022	3	LIHTC
Mantua Presbyterian Apartments	Mantua Presbyterian Apartments Inc.	Owned	600 N 34th St	Philadelphia	PA	19104	MAH	65	2008	6	HUD 202/PRAC
Maple Village Apartments	Maple Village Apartments LP	Owned	22 West Rittenhouse Street	Philadelphia	PA	19144	MVT	70			HUD/LIHTC
Martha A. Lang Sr. Cyber Village / Mt. Tabor	Cyber Village LP	Managed	973 N 7th St	Philadelphia	PA	19123	MTT	56	2008	4	LIHTC
Mary Field Senior Apartments	Mary Field Senior Apartments LP	Owned	2100 S 58th St	Philadelphia	PA	19143	MFT	168	2024		HUD/LIHTC
Morgan Hill Senior Housing	Morgan Hill Senior Housing LP	Managed	16685 Church St	Morgan Hill	California	95037	MHL	84	2024	3	LIHTC
Morrisville Presbyterian Apartments	Phila. Presbytery Apts. of Morrisville Inc.	Owned	1 Hillcrest Ave	Morrisville	PA	19067	MVH	99	1986	9	HUD 202/8
Mount Rubidoux Manor	Mt. Rubidoux Manor LLC	Owned	3993 10th St	Riverside	CA	92501	MXM	188	1971	16	HUD/LIHTC
Mountain Vistas	Senior Affordable Housing Corporation # 4	Owned	675 Peppertree Ln	Redding	CA	96003	MV1	57	2004	3	HUD 202/PRAC
Mountain Vistas II	Redding Mountain Vistas II	Owned	385 Hilltop Dr	Redding	CA	96003	MV2	40	2006	3	HUD 202/PRAC
Nativity BVM	Nativity B.V.M. Place	Managed	3255 Belgrade St	Philadelphia	PA	19134	NBH	63	2015	4	HUD 202/PRAC
Neumann Senior Housing	Neumann Senior Living	Managed	1601 E Palmer St	Philadelphia	PA	19125	NMH	69	2005	5	HUD 202/PRAC
Northaven West	Northaven Three Northgate LP	Owned	545 NE 112th St	Seattle	WA	98125	NTH	82	2022	3	HUD/LIHTC
Oak Knolls Haven	Oak Knolls Haven Corporation	Owned	4845 S Bradley Rd	Santa Maria	CA	93455	OKH	40	1983	2	HUD 202/8
Old City Presbyterian Apartments	Old City Presbyterian Apts. Inc.	Owned	25 N 4th St	Philadelphia	PA	19106	OCH	59	1970	6	HUD 202/PRAC
Olive Plaza		Managed	1133 Olive St	Eugene	OR	97401	OPZ	150	1980	12	HUD 202/8
On Lok House	On Lok House of Philadelphia Inc	Managed	219 N 10th St	Philadelphia	PA	19107	OLH	54	1984	8	HUD 202/8
Pacific Meadows	Pacific Meadows Senior Housing LP*	Owned	5315 Carmel Valley Rd	Carmel	CA	93923	PMW	200	1991		HUD/LIHTC
Palmer House	Palmer House, LP	Owned	555 E Palmer Ave	Glendale	CA	91205	PRH	22	1992	3	HUD/LIHTC
Park Paseo	Park Paseo, Inc	Owned	123 S Isabel St	Glendale	CA	91205	PPO	98	1985	8	HUD/LIHTC
Paschall Senior Housing	Paschall Senior Housing Inc.	Owned	2125 S 70th St	Philadelphia	PA	19142	PSH	62	2009	4	HUD 202/PRAC
Pensdale Apartments	Pensdale Housing Inc.	Managed	4200 Mitchell St	Philadelphia	PA	19128	P1T	65	2004	5	HUD 202/PRAC
Pensdale II Apartments	Pensdale II, L.P.	Managed	4200 Mitchell St	Philadelphia	PA	19128	P2T	38	1999	4	LIHTC
Reed Street Presbyterian	Avenue of the Arts-Presbyterian PSC Apts, Inc.	Owned	1401 S 16th St	Philadelphia	PA	19146	RSH	84	2001	5	HUD 202/PRAC
Riverside Presbyterian Apartments	Riverside Senior Apts. LP	Owned	158 N 23rd St	Philadelphia	PA	19103	RSA	150	1980	3	HUD/LIHTC
Rose View Terrace	Rose View Terrace, Inc.	Owned	101 W Barstow Ave	Clovis	CA	93612	RTI	60	2012	3	HUD 202/PRAC
Rosewood Court	Beacon Senior Housing Corporation	Owned	1888 N Fair Oaks Ave	Pasadena	CA	91103	RWC	65	2004		HUD 202/PRAC

Rotary Plaza	Rotary Plaza, LP	Owned	433 Alida Way	South San Francisco	CA	94080	RPL	179	1970		HUD/LIHTC
Rotary Terrace	Miller Avenue Senior Housing, L.P.	Owned	310 Miller Ave	South San Francisco	CA	94080	MSH	81	2018	5	LIHTC
Royal Vista Terrace	Royal Vista Terrace Apartments, LP	Owned	1310 Royal Oaks Dr	Duarte	CA	91010	RVT	75	1982	3	HUD/LIHTC
Salba Apartments	Salba Corporation	Managed	309 Walnut St	Philadelphia	PA	19106	SAH	17	1963	3	HUD 236/8
Salishan Gardens	Salishan Senior Housing, Inc.	Owned	4401 E R St	Tacoma	WA	98404	SLG	54	2010		HUD 202/PRAC
Scottish Rite House	Supreme Council Fitzwater Development Corp.	Managed	1525 Fitzwater St	Philadelphia	PA	19146	SHH	125	1985	13	HUD 202/8
Scottish Rite Tower	Scottish Rite Tower Development Corporation	Managed	1530 Fitzwater St	Philadelphia	PA	19146	STH	106	1996	13	HUD 202/PRAC
Shepherd's Garden	Good Shepherd Senior Housing Corp.	Owned	6927 196th St SW	Lynnwood	WA	98036	SHG	40	2010	3	HUD 202/PRAC
Sierra Gateway Senior Residence	Sierra Gateway Senior Residence	Owned	5125 N Marty Ave	Fresno	CA	93711	SG1	80	2007	3	HUD 202/PRAC
Sierra Gateway Senior Residence II	Sierra Gateway Senior Residence II	Owned	5125 N Marty Ave	Fresno	CA	93711	SG2	68	2014	3	HUD 202/PRAC
Sojourner Truth Manor	Sojourner Truth Housing Inc.	Managed	6015 Martin Luther King Jr Way	Oakland	California	94609	STM	85			
St John Neumann Place	St. John Neumann Place, LP	Managed	2600 Moore St	Philadelphia	PA	19145	J1T	76	2008	3	LIHTC
St John Neumann Place II	St. John Neumann Place II Senior Housing LP	Managed	2627 Mifflin St	Philadelphia	PA	19145	J2T	52	2017	3	LIHTC
St. Francis Villa	St. Francis Villa Senior Housing, LP	Managed	2450 Emerald St	Philadelphia	PA	19125	SFT	40	2016	3	LIHTC
St. Joseph Place	St. Josephs Place Senior Housing, LP	Managed	502 Woodlawn Ave	Collingdale	PA	19023	SJP	50	2022	5	HUD/LIHTC
St. Rita Place	St. Rita Place Senior Housing, L.P.	Managed	1148 S Broad St	Philadelphia	PA	19146	SRT	46	2021	5	LIHTC
Sun Tower	Sun Tower Partners LLLP*	Owned	6 N 6th St	Yakima	WA	98901	SUN	141	1968	12	HUD/LIHTC
Sycamore Terrace	Sycamore Terrace LLC	Owned	1301 San Bernardino Rd	Upland	CA	91786	SYT	100	1979	3	HUD/LIHTC
Tahoe Senior Plaza	Tahoe Senior Plaza, Inc.	Owned	1101 3rd Street	South Lake Tahoe	CA	96150	TSP	45	1999	2	HUD 202/PRAC
The Gardens	Soroptimist Gardens Housing Corporation	Owned	333 Monterey Rd	Glendale	CA	91206	TGL	75	1994	5	HUD 202/PRAC
The Otto Gruber House	Senior Affordable Housing Corporation # 1	Owned	143 S Isabel St	Glendale	CA	91205	OGH	40	1999	4	HUD 202/PRAC
The Pearl on Oyster Bay	Bay Vista Partners LLLP*	Owned	550 Russell Rd	Bremerton	WA	98312	POB	81	2014	4	HUD/LIHTC
Three Rivers Village	Three Rivers Senior Housing, LLLP*	Owned	651 McMurray St	Richland	WA	99354	TRV	41	1983		HUD/LIHTC
Tioga Presbyterian Apartments	Tioga Presbyterian Apts. Inc.	Owned	1531 W Tioga St	Philadelphia	PA	19140	TPH	113	1996	7	HUD 202/PRAC
Tower Park	Tower Park, LP	Owned	701 17th St	Modesto	CA	95354	TWP	49	2016	3	LIHTC
Valley Vista	Valley Vista Senior Housing, LP*	Owned	20709 San Ramon Valley Blvd	San Ramon	CA	94583	VAV	105	2011		HUD/LIHTC
Westminster Court	Westminster Court, L.P.	Owned	6850 Florence Pl	Bell Gardens	CA	90201	WCT	75	1992		HUD/LIHTC
William C. Arthur Terrace	Senior Affordable Housing Corporation # 6	Owned	1275 W 8th St	Corona	CA	92882	WAT	40	2005	3	HUD 202/PRAC
Witherspoon Senior Apartments	Witherspoon Senior Apartments LP	Owned	2050 S 58th St	Philadelphia	PA	19143	WIT	60	2018	2	LIHTC
Wynnefield Place	Wynnefield Place LP	Owned	1717 N 54th St	Philadelphia	PA	19131	WFT	48	2014	4	HUD/LIHTC

If you would like to inquire about or visit any properties development by and/or owned and operated by Beacon Development Group and HumanGood Affordable Housing, please contact Peggy Lichthart, Development Director at Beacon Development Group, a HumanGood Company.

Email: PeggyL@beacondevgroup.com

Telephone: (310) 600-0237

ROTARY TERRACE**HumanGood Affordable Housing**

310 Miller Ave, South San Francisco, CA 94080



Construction Completion: January 2019

Population Served: Low-income disabled, homeless seniors up to 30% and 50% AMI

Number and Type of Units: New construction of 81 senior units

Building Description: Rotary Terrace is a partnership between the Rotarians of South San Francisco, dba as Rotary Plaza Inc. and HumanGood Affordable Housing. The project is an eighty-one (81) unit affordable senior apartment complex on City-owned sites in downtown South San Francisco with all restricted units targeting households at or below 50% AMI.

The Development is located ¼ mile from a Caltrain station and within the City's Downtown redevelopment subarea. Amenities include exercise room, library, bike storage, high-speed internet, community space, roof-top garden, central laundry and social service space. Program space will be used in conjunction with a partnership of the Health Plan of San Mateo to support medical needs of residents. Additionally, there is an accessory use area that is available as flexible community meeting space.

Sponsor:	HumanGood Affordable Housing
Co-Developer:	Rotary Club of South San Francisco
Development Consultant:	Beacon Development Group
Property Manager:	HumanGood Affordable Housing
Architect:	HKIT Architects
General Contractor:	James-Roberts-Obayahshi Corp.

Permanent Funding Sources: LIHTC Equity 4% - Enterprise Community Partners
 Tax Exempt Permanent Loan – Citibank
 County of San Mateo Dept. of Housing
 Federal Home Loan Bank – Silicon Valley Bank
 Deferred Fee
 GP Loan – Rotary Plaza Inc.

Total Development Cost: **\$40,504,529**



Morgan Hill

HumanGood Affordable Housing



16685 Church St.
Morgan Hill, CA 95037

Affordable housing for low-income individuals and families earning up to 30% and 50% of area median income.

82 one-bedroom and 1 two-bedroom units

Construction Completed
February 2024

Owner/Developer

HumanGood Affordable Housing

Development Consultant

Beacon Development Group

Property Manager

HumanGood Affordable Housing

Architect

HKIT Architects

General Contractor

Branagh Construction, Inc.

Permanent Funding Sources

4% Tax Credit Equity
Tax Exempt Bonds
Seller Note
Deferred Developer Fee
GP Equity
Sponsor Reserve Note



Building Description

The project is a partnership between HumanGood Affordable Housing (HGAH) and the Sunnyvale Life, Inc. (SLI). Morgan Hill Senior Housing is a 3-story apartment building serving low-income seniors.

Outdoor amenities include a central courtyard, raised planter beds, drought tolerant landscaping, a covered walkway and drop-off area that leads to 37-pervious resident parking spaces. Equipped with photovoltaic solar panels on the roof top, this apartment building will be fully electric only. Interior features include a welcoming lobby, manager and service coordinator offices, community room, secured laundry room, media room, fitness center and a 3rd floor roof deck open space. The total building square footage is estimated to be 69,825 sq. ft.



Ethiopian Village

HumanGood Affordable Housing

Ethiopian Community in Seattle



8323 Rainier Ave.
Seattle, WA 98118

Affordable housing for Seniors
55 years and older at 30%, 50%
and 60% of Area Median In-
comes

49 studios, 40 one-bedroom
apartments and one 2-bedroom
manager's unit

Construction Complete
May 2023

Owner/Developer
HumanGood Affordable Housing
Ethiopian Community in Seattle

Development Consultant
Beacon Development Group

Property Manager
HumanGood Affordable Housing

Architect
Environmental Works

General Contractor
Walsh Construction

Permanent Funding Sources
City of Seattle Office of Housing
State of Washington Housing
Trust Fund
Hudson Housing Capital
Umpqua Bank – construction
and permanent lender
Capital Campaign
State of Washington Department
of Commerce – Capital Facilities
City of Seattle Equitable
Development Initiative



Building Description

Motivated by growing threats to housing affordability and community stability, the Ethiopian Community in Seattle (ECS) partnered with HumanGood Affordable Housing (HGAH) for this affordable housing development.

This project preserved the original community center and expanded the space so the Ethiopian community can gather to access programming which includes low-cost meals, exercise classes, speaker engagements, opportunities to socialize and connect, computer literacy and more. This project will allow the Ethiopian community to flourish, elders to age in place, and newly arrived refugees and immigrants to successfully transition to their new home country. The housing and center are open to all members of the community.



Waterford Property Company “Waterford” is an experienced operator and developer of institutional “Class A” multifamily rental projects throughout the state of California. Since its founding in 2014, Waterford has acquired and developed over \$3 billion in real estate assets.

Key Stats and Partnerships

Leveraging private and public partnerships, Waterford has developed **unparalleled industry expertise** in the Southern California real estate market.

4,000+

Southern California
residential units
entitled or developed

1.5MM+

Square feet of
commercial projects
acquired since 2021

15

Existing essential
housing locations in
Southern California

4,300+

California residential
units acquired in last
two years

Essential Housing Partners



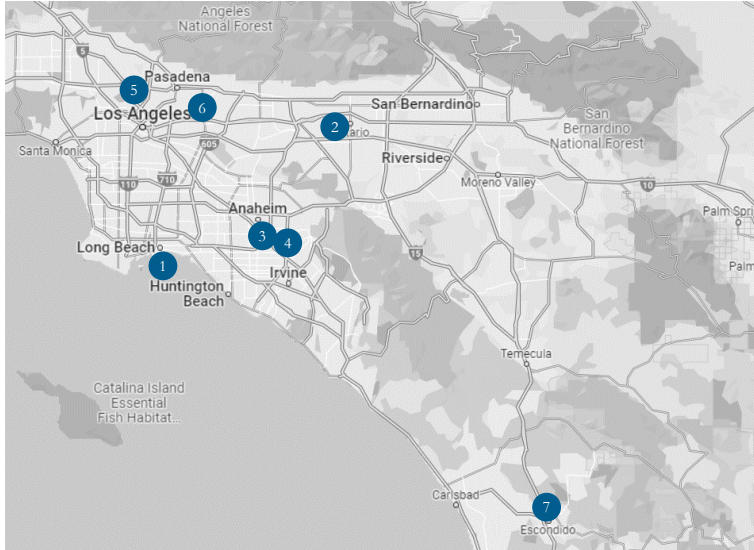
Core Values

Waterford attributes all past, current, and future success to a steadfast commitment to its **core values**:



Industry-Leading Workforce Housing Provider

Through the Essential Housing Program, Waterford has **partnered with local governments** to provide **4,014 units of middle-income housing**.



Waterford Essential Housing Cities

- 1 Long Beach – 1 property, 216 units
- 2 Pomona – 1 property, 472 units
- 3 Anaheim – 3 properties, 1,051 units
- 4 Orange – 2 properties, 356 units
- 5 Glendale – 1 property, 507 units
- 6 Pasadena – 4 properties, 1,098 units
- 7 Escondido – 3 properties, 314 units

Parc Derian

Irvine, CA

This 80-unit affordable family project is a four-story apartment complex located in the Irvine Business Complex (IBC), a mixed zoning area, with high density residential, commercial and light industrial uses. The contemporary architecture incorporates urban inspired elements, is designed to achieve a LEED Gold energy efficient certification. Developed on a 2.2- acre urban infill site with almost a half-acre of open space. Social services such as health and education enhancement programming.

Project Data

Project Size: 80 units

Commercial: 40,000 SF

Completed: 2017

Estimated Cost of Project: \$33.35M



Market-Rate Housing Development

Waterford has successfully entitled and developed approximately 3,000 residential units for development, and currently has over 1,500 market rate units in the pipeline throughout California.

Mosaic – Long Beach, California



Project Type: Market Rate Housing
Project Status: Phase 1 Under Construction
Number of Units: 900
Development Cost: \$450M

- Waterford acquired a 14-acre open-air retail center in DTLB and is underway of a redevelopment for a portion of the property (5.5 acres), which will include 900 total housing units and 38,000 SF of ground floor commercial space. The project’s pedestrian improvements are designed to promote a more walkable neighborhood for residents, visitors, and businesses. A mix of sustainable benefits are incorporated into the project (EV, all-electric appliances). Project is adjacent to the 5th Street Station in LB on the A Line of LA Metro.

Foothill Landing – [Rancho Cucamonga, California]



Project Type: Market Rate Housing
Project Status: Entitled / Pre-Construction
Number of Units: 360
Development Cost: \$150M

- Waterford acquired a 6-acre property in the City of Rancho Cucamonga and successfully received unanimous approval for a mixed use project consisting of 360 market rate units, live-work units, as well as ground floor retail.
- The project is a forward-thinking mixed-use development that creates an activated street scene and attractive home for working professionals.
- At the street level, dedicated live/work units and retail-ready frontages connected with the pedestrian flow along Foothill Boulevard, activating the building’s public face.
- A walking circuit makes a loop around the building, connecting the residents to each other and their neighborhood as the circuit intersects with public and private walkways.



HKIT ARCHITECTS

In continuous practice since 1948, HKIT Architects has focused on the design of places that make a positive difference in our community. Our mission is to create meaningful environments through beautiful and functional design that strengthens communities. We design for, and are in partnership with our communities, many of which are historically underserved.

We are a mid-sized firm offering the experience, talent, and resources of a larger firm and operate with a high level of specialization and client attentiveness characteristic of a smaller, locally-minded firm. What distinguishes our practice is our deep commitment to client service and a record of thoughtful and consistent responsiveness to their needs.

Our Senior Living Studio focuses on the design of communities dedicated to serving the elder demographic to ensure a quality of life that fosters connections, meaning, and healthy aging. Our work encompasses market-rate and affordable developments that provide unique combinations of assisted-living, skilled nursing, independent living, memory care, adult day health, and all-inclusive senior health care. We work with our clients – developers, community-based organizations, and not-for profits – to envision and design the best care environments that support aging with grace and ease.



SENIOR RESIDENTIAL COMMUNITIES

The following is a selected list of HKIT's senior residential projects, a combination of affordable and market-rate communities. Our experience spans new construction, renovations, and occupied rehabilitation.

Arden Wood, San Francisco

- Interior renovation of over 60,000 SF since 1998 including public spaces, corridors, dining areas, offices, and assisted and independent living areas

Baywood Court, Castro Valley

- Interior Renovations
- Master Plan

Beacon Development Group / HumanGood

- Life's Garden Renovation, Sunnyvale (208 units)
- Morgan Hill Senior Community, Morgan Hill (82 units)
- Piedmont Gardens Renovation, Oakland (176 units)
- Rotary Gardens, South San Francisco (81 units)
- Rotary Terrace, South San Francisco (81 units)
- Valley Vista Senior Housing, San Ramon (105 units)

Belmont Village Senior Living

- Belmont Village, Albany (175 units)
- Belmont Village, Los Gatos (152 units)
- Belmont Village, San Ramon (177 units)
- Belmont Village, Sunnyvale (117 units)

BRIDGE Housing

- 3850 -18th Street Renovation, San Francisco (107 units)
- Mission Dolores Renovation, San Francisco (91 units)
- Redwood Shores, Vallejo (120 units)

Carmel Valley Manor

- Life Plan Community Master Plan, Carmel (150 units)

Center for Elders' Independence / HumanGood / Beacon Development Group

- 1465 Civic Court Senior Housing Conceptual Design, Concord (65 units)

Channing House, Palo Alto

- Interior Renovations (250 units)
- Master Plan
- New Healthcare Center – ALU & SNF
- Second Floor Renovation (14 units)

Chinatown Community Development Center

- Mary Helen Rogers Senior Community, San Francisco (100 units)

Christian Church Homes

- Don Stump Southlake Tower Renovation, Oakland (130 units)
- Flower Park Plaza Renovation, Santa Ana (199 units)
- Kottinger Place, Pleasanton (150 units)
- St. Mary's Garden Renovation, Oakland (101 units)

Dominican Oaks

- Dominican Oaks Rehabilitation, Santa Cruz (150 units)

EAH Housing

- Nevin Plaza Rehabilitation, Richmond (138 Units)
- Nevin Plaza Senior Housing, Richmond (70 units)

Eden Housing

- Eden Issei Senior Housing Renovation, Hayward (100 units)
- Estabrook Senior Housing, San Leandro (50 units)
- Miraflores Senior Community (80 units)
- Monterey Villa, San Jose (20 units)
- Ridgeview Commons, Pleasanton (200 units)
- Wisteria Place, Union City (40 units)

Elder Care Alliance

- AlmaVia of Camarillo Assisted Living Community (90 units)
- AlmaVia of San Francisco Assisted Living Community (140 units)
- AlmaVia of San Francisco Memory Care Center Renovation
- AlmaVia of San Rafael Assisted Living Community (130 units)
- AlmaVia of Union City Assisted Living Community (80 units)
- Mercy Care & Retirement Center, Oakland (59 units)

Heritage at the Marina, San Francisco

- Interior renovation of 100 units and Morgan Building, Friendship Hall, and Cottage

Hines + Clearwater Living

- Huntington Beach Senior Living, Huntington Beach (202 units)

InnovAge

- PACE Center, Sacramento

Kendal Corporation

- Enso Village, Healdsburg (221 units)

Kimochi, Inc.

- Kimochi Assisted Living Facility, San Mateo (14 units)

Mercy Housing California

- 111 Jones St. Apartments, San Francisco (108 units)
- Casa de la Misión, San Francisco (45 units)
- Dorothy Day Senior Community Rehabilitation, San Francisco (100 units)
- Francis of Assisi Renovation, San Francisco (110 units)
- Heritage Homes, San Francisco (148 units)
- Madonna Residence Rehab (70 units)
- Mission Creek Community, San Francisco (140 units)
- Presentation Community, San Francisco (93 units)
- Vera Haile Senior Housing, San Francisco (90 units)

MidPen Housing

- Colma Ridge, Colma (20 units)
- DeVries Place, Milpitas (103 units)
- Kottinger Place Master Plan, Pleasanton (95 units)
- Rotary Floritas, San Mateo (50 units)
- Rotary Hacienda, San Mateo (82 units)
- Vista Estero at Brooklyn Basin, Oakland (110 units)

North East Medical Services

- 2323 Sacramento Street RCFE Renovation, San Francisco (22 units)

O'Connor Woods, Stockton

- Expansion and interior renovation of 8,000 SF dining room
- Master Plan and Design Guidelines

Oppidan

- Watermark, Santa Cruz (76 units)

Oppidan + Clearwater Living

- Clearwater at Windsor, Windsor (246 units)

Related California

- Lion Creek Crossings Phase V, Oakland (128 units)
- Northgate Terrace Renovation, Oakland (201 units)

Saratoga Retirement Community, Saratoga

- Home Building & Memory Care Renovation (24 units)
- Villas Building Adaptive Reuse (122 units)

Satellite Affordable Housing Associates

- Casa Montego, Walnut Creek (80 units)
- Columbia Park Manor, Pittsburg (79 units)
- Helios Corner, Berkeley (80 units)
- Jordan Court Senior Housing, Berkeley (37 units)
- Monarch Homes, Oakland (51 units)
- Noble Tower, Oakland (195 units)
- Valdez Plaza, Oakland (150 units)

Sequoia Living

- The Sequoias, Portola Valley (330 units)
- The Sequoias, San Francisco (292 units)
- The Tamalpais, Greenbrae (220 units)
- Viamonte at Walnut Creek (191 units)

Sisters of Mercy, Burlingame

- Marian Care Center Interior Renovations (47 units)

Spirit Living Group

- Elegance Berkeley, Berkeley (96 units)

The Forum at Rancho San Antonio

- Continuing Care Retirement Community (450 units)
- Interior Renovations
- New Healthcare Center

The Lesley Foundation

- Bonnie Brae Terrace Rehabilitation, Belmont (164 units)

Todco Development

- Ceatrice Polite Senior Apartment Rehabilitation, San Francisco (91 units)

Welltower / Cogir Senior Living

- Cogir of Fremont Interior Renovation, Fremont (163 units)

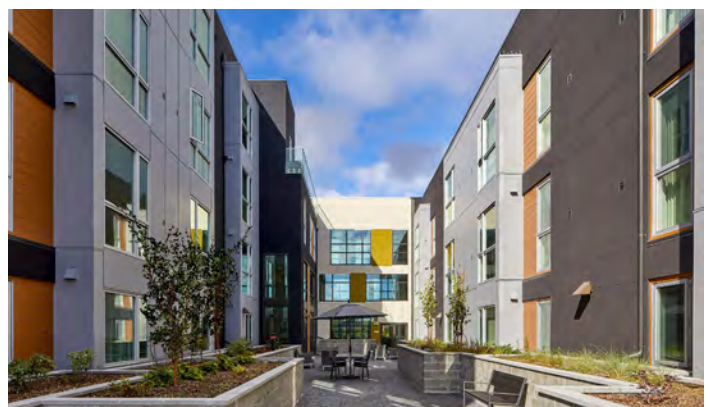


ROTARY TERRACE | SOUTH SAN FRANCISCO, CA

Client: Beacon Development Group / Human Good

The Rotary Terrace residential development is located on an important urban infill site near City Hall in downtown South San Francisco. The project includes 81 units in four stories above podium parking and 6,500 SF of commercial space. It serves to revitalize the central corridor of the city and enliven the street frontage.

In an effort to develop a higher density urban model, the City contributed the land and encouraging a higher better use than its current single family residential / surface parking. This new community serves as inspiration for other similar high-density multi-family developments. The HKIT design reflects the City's view of its own future modernist urban vision.





PASEO ESTERO & VISTA ESTERO | OAKLAND, CA

Client: MidPen Housing

Located in Oakland's emerging Brooklyn Basin neighborhood, Paseo Estero and Vista Estero include two multi-story buildings with one, two- and three-bedroom units. The affordable multi-family building consists of 101 units and the affordable senior contains 110 units.

The design goals of the project were to create a vibrant new mixed-use neighborhood with a diverse mixture of residents; to provide walkable, activated, and lively public streets and open spaces; to spatially define and reinforce the public character of the streets and open spaces; and to provide a diversity of architectural expressions. The two buildings utilize different materials, textures, and colors to increase the richness of the urban environment.

This project is part of a larger master-planned community (Oak to Ninth) and was designed to conform to the guidelines established in the master plan.





CASA DE LA MISIÓN | SAN FRANCISCO, CA

Client: Mercy Housing California

Located on 24th Street between Harrison and Balmy in the heart of the Calle 24 Latino Cultural District, the Casa de la Misión residential development offers 45 units of affordable senior housing and community and commercial space.

The Type V, five-floor community features a mix of studios and one-bedroom apartments. The ground floor includes a residential lobby, administrative space, and commercial/retail space. The project is GreenPoint Rated Silver.

As the Executive Architect, HKIT collaborated with YA Studio as the Associate Architect.



5

Project Approach



5. Project Approach

Our team's approach emphasizes collaboration, efficiency, and proven execution across each stage of development. HumanGood brings extensive experience delivering senior affordable housing and Waterford delivering market-rate family housing, often in mixed-use contexts, and will apply lessons from similar projects to ensure success here.

- **Planning & Design** – We begin with early stakeholder engagement and close coordination with the City to align on land use, density, and community goals. HKIT, our architect, has already prepared a preliminary site plan and will refine it through an inclusive design process to balance affordability, livability, and long-term sustainability.
- **Approvals** – Our team has successfully navigated local entitlement and state funding approvals in multiple jurisdictions. We anticipate pursuing streamlined approvals by building on our established relationships with planning and housing agencies. Although still involving the Community .
- **Financing** – For the senior affordable component, we will pursue a either a 9% or 4% tax credits/bonds, county, state and federal resources. For the market-rate family component, Waterford Property Company brings extensive capital markets expertise, with over \$3B in transactions, ensuring timely and efficient execution.
- **Phasing & Development** – We will explore a phased approach that allows market-rate and affordable components to advance in tandem while accommodating financing timelines and funding cycles. This ensures early activation of the site and efficient delivery of housing units.
- **Construction** – The Project Team partners with experienced general contractors who have delivered large-scale multifamily and senior projects, employing value-engineering and sustainable building practices to control costs and enhance quality.
- **Operation** – HumanGood, one of the largest senior housing providers in California, will oversee operations of the affordable senior housing, ensuring high-quality resident services. Waterford Property Company will have Greystar manage the market-rate family housing component, leveraging its strong track record in multifamily operations.

Conveyance Structure

We understand the Agency's preference for a fee simple sale and are prepared to structure the transaction accordingly. We have successfully executed both fee simple and ground lease transactions and are open to working with the Agency to determine the structure that best supports project goals. The Project Team prefers a fee simple sale.

Relevant Experience

Our team has successfully delivered several similar projects, including Rotary Terrace (senior affordable housing), and Morgan Hill Senior Housing, each of which integrated thoughtful design, complex financing, and long-term operational success. Waterford similarly has also successfully delivered several similar projects. Please see Tab #4 for detailed Relevant Project Experience.

The project team proposes and anticipates the following timelines related to planning, design, approvals, financing, phasing, development, construction, and operation.

Milestone	Completion Target
------------------	--------------------------

- | | |
|---|--------------|
| - Consideration of ENA with the City of Daly City | October 2025 |
|---|--------------|

Site Feasibility:

- | | |
|--|--------------|
| - Environmental and Geotechnical Studies | January 2026 |
|--|--------------|

Design:

- | | |
|-------------------------|--------------|
| - Preliminary Study | January 2026 |
| - Conceptual Drawings | Q2 2026 |
| - Schematic Drawings | Q1 2027 |
| - Design Development | Q3 2027 |
| - Construction Drawings | Q1 2028 |

Permitting:

- | | |
|----------------------------------|---------|
| - Land Use Permit Application | Q2 2026 |
| - Land Use Permit Issued | Q1 2027 |
| - Building Permit Application | Q4 2027 |
| - Building Permit Corrections #1 | Q1 2028 |
| - Building Permit Corrections #2 | Q2 2028 |
| - Building Permit Issued | Q3 2028 |

Funding:

- | | |
|-----------------------------------|---------|
| - County of San Mateo Application | Q1 2028 |
| - State HCD SuperNOFA Application | Q2 2028 |
| - CDLAC/TCAC Application | Q3 2028 |
| - CDLAC/TCAC Award | Q3 2028 |
| - Financial Closing | Q4 2028 |

Construction:

- | | |
|-----------------------------|---------|
| - Select General Contractor | Q1 2028 |
| - Contract Execution | Q4 2028 |
| - Begin Construction | Q4 2028 |
| - Complete Construction | Q1 2030 |

Lease-Up:

- | | |
|--------------------------------|---------|
| - Begin Lease Up and Marketing | Q4 2029 |
| - 100% Occupied | Q1 2030 |

6

Financial Data



6. Financial Data

Developer/Entity Overview

Beacon Development Group, a HumanGood Company (HGAH) www.beacondevgroup.com is an experienced real estate development organization specializing in senior affordable housing. Since 1998, our team has successfully completed 115 projects totaling more than 7,500 and representing over \$1.9 billion in development costs.

Waterford Property Company (Waterford) www.waterfordco.com has an extensive track record in real estate development projects, including multifamily residential development, affordable housing development and the repositioning of multifamily and commercial properties. Since 2014, Waterford has built or acquired over 7,384 Multifamily Units. Total Transaction Volume of \$2.82B.

Track Record of Financing

HGAH has structured and closed financing on projects ranging from \$950,000 to \$83 million in size. In the past 28 years, we have successfully delivered:

- Over 7,000 units of affordable housing are financed with Low-Income Housing Tax Credits (LIHTC), tax-exempt bonds, and soft funding sources.
- Mixed-use developments incorporating residential, commercial, and community-serving uses.

Waterford currently has \$3 Billion assets under management throughout California, reflecting their dedication to delivering high-quality developments that have exceeded the expectations of local stakeholders. Waterford exceeds \$100 million in assets and cash, underscoring our financial stability and capacity to undertake substantial projects. In addition, Waterford has a proven track record of institutional investors that have invested over \$2.5 billion in capital with Waterford.

Access to Capital

HGAH and Waterford maintains strong relationships with lenders, investors, and public agencies, including:

HGAH

- Citibank
- Umpqua Bank
- Merritt Community Capital
- Enterprise Community Development
- Royal Bank of Canada
- Raymond James

Waterford

- Farmers & Merchants Bank
- Berkadia
- Private Investors

HGAH and Waterford also maintain lines of credit and access to private equity partners, ensuring timely capitalization and execution of projects.

Anticipated Financing Structure for Proposed Project

- **Senior Affordable Housing (75 units):** Financed through 4% or 9% LIHTC, tax-exempt bonds, gap financing (City of Daly City, County of San Mateo, State HCD), deferred developer fee, and other available local/state resources.
- **Market-Rate Housing (125 units):** Conventional construction loan, permanent financing, and private equity investment.
- **PACE Center (if applicable):** Potential grant or philanthropic support, in collaboration with a healthcare service provider.

Evidence of Capacity

HGAH and **Waterford** have the financial and organizational capacity to deliver projects of this scale. Formal documentation including audited financial statements, balance sheets, and lender reference letters can be provided upon request to verify our team's ability to finance and complete the proposed development.



WATERFORD

August 18, 2025

Request for Proposals

Daly City Housing Development Finance Agency
Economic & Community Development
333 90th Street
Daly City, CA 94015

Re: Statement of Financial Qualifications

We appreciate the opportunity to be considered for the Carter and Martin Site RFP. We understand the importance of transparency and the need for comprehensive financial information during the selection process. However, at this time, we are unable to release our company's financials. We trust you understand that such information is sensitive and proprietary. Rest assured, if selected for the project, we are more than willing to provide detailed disclosures of our company's robust financial health and its position as a leading developer in California.

Waterford has an extensive track record in real estate development projects, including multifamily residential development, affordable housing development and the repositioning of multifamily and commercial properties. Waterford currently has \$3 Billion assets under management throughout California, reflecting our dedication to delivering high-quality developments that have exceeded the expectations of local stakeholders. Waterford is especially unique for its commitment to fostering positive relationships with local communities and leaders, ensuring that our projects contribute positively to the overall well-being of the areas in which we operate. Furthermore, Waterford exceeds \$100 million in assets and cash, underscoring our financial stability and capacity to undertake substantial projects. In addition, Waterford has a proven track record of institutional investors that have invested over \$2.5 billion in capital with Waterford.

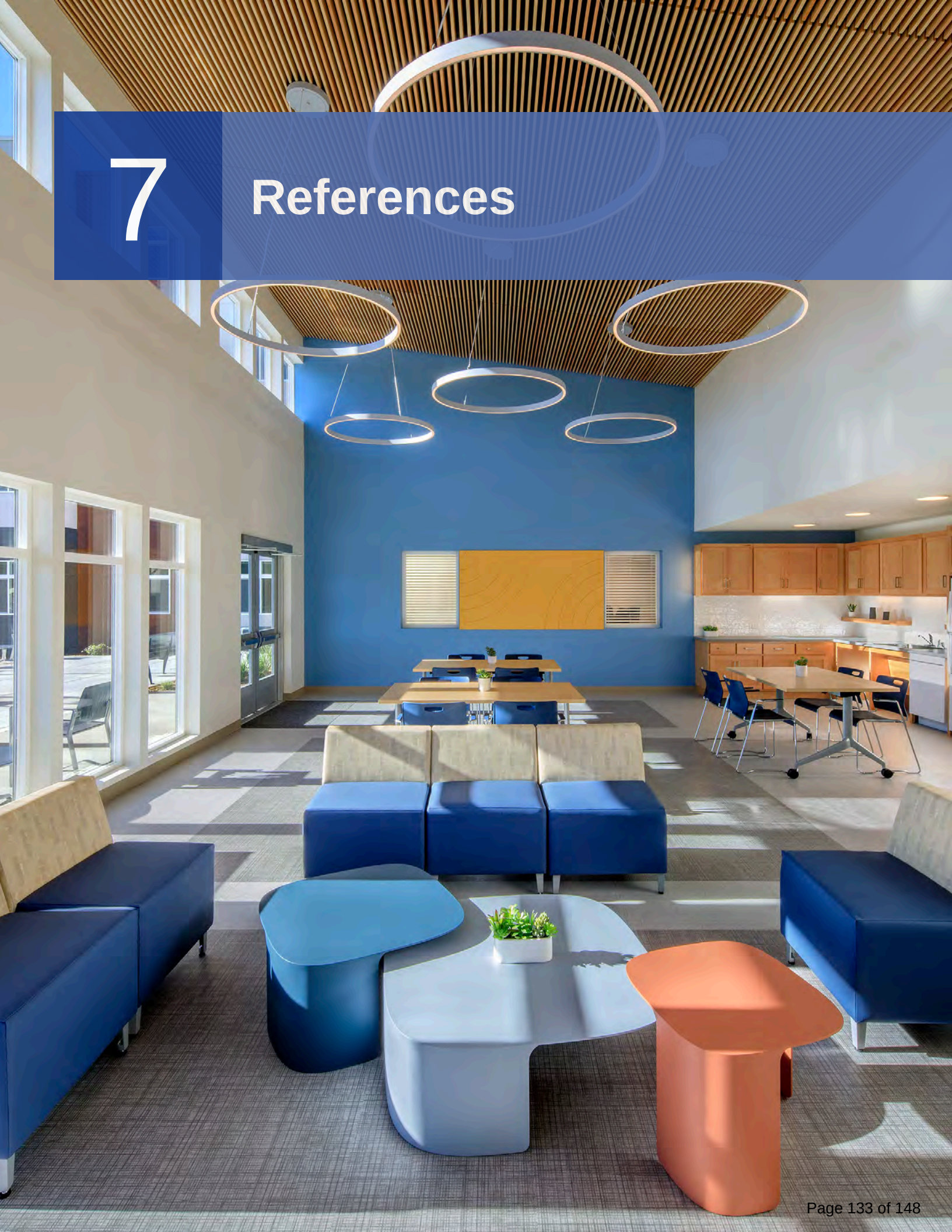
We understand the significance of this project for the broader community. If chosen, we are fully committed to providing additional detailed financial information to further assure you of our capabilities and dedication to the success of this project. Thank you for considering us for this opportunity. Should you require any further information or clarification, please do not hesitate to contact us.

Sincerely,

Jeremy Borden
Controller
Waterford Property Company
4500 Bayview Circle, Suite 4500
Newport Beach, CA 92660
949-529-3530

7

References





**Beacon Development Group, a HumanGood
Company/HumanGood Affordable Housing
References**

Beacon Development Group, a HumanGood Company/HumanGood Affordable Housing References

Financial References

Hao Li

Citi Community Capital
Director
300 South Grand Avenue, Suite 3110
Los Angeles, CA 90071
Telephone: (213) 239-1914
Mobile: (650) 303-1847
Hao.li@citi.com
www.citicomcommunitycapital.com

Kevin Kilbane

Raymond James Affordable Housing Investments, Inc.
Managing Director, West Coast Acquisitions
5420 La Jolla Blvd.; #B104
La Jolla, CA 92037
Telephone: (216) 509-1342

Stacie Altmann

Royal Bank of Canada (“RBC”)
RBC Community Investments
Managing Director, Tax Credit Originations
Telephone: (628) 233-4862
stacie.altmann@rbccm.com

Public & Elected Officials References

Fiona Ma, Elected Official

California State Treasurer
California Tax Credit Allocation Committee
901 P Street, Room 411-B
Sacramento, CA 95814
Telephone: (916) 653-2995

John Conley, Elected Official

City Manager
City of Vista
200 Civic Center Drive
Vista, CA 92084
Email: jconley@ci.vista.ca.us
Telephone: (760) 643-5201

DC Navarette

Section Chief
California Debt Limit Allocation Committee
901 P Street, Suite 213 A
Sacramento, CA 95814
(916) 653-3255

Jan Stokely

Housing & Community Development
Department of Housing San Mateo County
264 Harbor Boulevard Bldg. A
Belmont, CA 94002
Email: jstokley@smchousing.org
Telephone: (650) 802-3372

Nell Selander

Director
City of South San Francisco, Economic & Community Development Department
PO Box 711
South San Francisco, CA 94083
Email: nell.selander@ssf.net
Main Telephone: (650) 829-6620
Direct Telephone: (650) 829-6623

Mike Noce

Housing Manager

City of South San Francisco Economic & Community Development Department

PO Box 711

South San Francisco, CA 94083

Email: Michael.noce@ssf.net

Main Telephone: (650) 829-6620

Direct Telephone: (650) 676-7155

Rebecca Garcia

Director of Housing

Santa Clara Housing Authority

505 West Julian Street

San Jose, CA 95110

Telephone: (408) 275-8770

Julie Graves

Santa Clara Housing Authority

505 West Julian Street

San Jose, CA 95110

Email: Julie.Graves@scchousingauthority.org

Telephone: (408) 275-8770



WATERFORD

**Waterford Property Company
References**

Waterford Property Company References

Financial References

Frank Wu

Vice President, Relationship Manager
Farmers & Merchants Bank
4695 MacArthur Court, Suite 130
Newport Beach, CA 92660

Edward Kim

Managing Director, Mortgage Banking
Berkadia
2020 Main Street, Suite 200
Irvine, CA 92614
Email: Edward.Kim@berkadia.com

Public Officials References

Christopher Koontz, AICP

Community Development Director
City of Long Beach Development Services
Email: Christopher.Koontz@longbeach.gov
Telephone: 562.570.6288

Relationship: Waterford acquired 14-acres of a large-scale open-air retail, office, and mixed-use property in the heart of downtown Long Beach. Waterford began a repositioning of the property by modernizing the retail areas and amenities at the property while also planning for redevelopment. In 2023, Waterford successfully received full entitlements approval from the City of Long Beach to redevelop a portion of the property with a mixed-use project consisting of 900 units and 40K SF of commercial.

Kirk Pelser

Deputy City Manager

City of Pomona

Email: kirk_pelser@ci.pomona.ca.us

Telephone: 909-620-2363

Relationship: 777 Place was acquired in partnership with the California Statewide Communities Development Authority (CSCDA) in its Workforce Housing program. The City of Pomona is a partner in this project. Upon acquisition of the project, 33% of the units were deed restricted to households making less than 50% AMI and remaining units were deed restricted to households at 60% to 120% of AMI. The project was acquired through the issuance of governmental revenue bonds and is undergoing an additional \$20M of capex improvements.

William Huan

Director of Housing

City of Pasadena

Email: whuang@cityofpasadena.net

Telephone: 626-744-8300

Relationship: Waterford has acquired 1,098 units and roughly 22,000 SF of retail across 4 Class-A assets in Pasadena (Residences at Westgate, Hudson Apartments, Theo Apartments, and Westgate Apartments). The projects provide affordability to households making under 50%, 80%, 100% and 120% of AMI. The projects were acquired in partnership with the California Statewide Communities Development Authority (CSCDA) in its Workforce Housing program. Waterford worked closely with the city of Pasadena throughout these acquisitions.



HKIT Architects

References

HKIT Architects References

Michael Hostler

Sr Vice President, Architecture

Belmont Village Senior Living

(713) 463-1795

Client reference for three Belmont Village Senior Living locations in San Ramon, Los Gatos/San Jose, and Albany, CA

Roger Bernstein

Vice President of Construction

Oppidan

(760) 419-8032

Client reference for Huntington Beach Senior Living and Clearwater Living Windsor, CA

Dave Egan

Director of Development & Construction

EAH Housing

(415) 295-8870

Client reference for Nevin Plaza Senior Housing, Richmond, CA

8

Litigation History with Public Agencies



8. Litigation History with Public Agencies

None

9

Community Engagement Process



9. Community Engagement Process

Our development philosophy is grounded in the belief that meaningful community engagement creates stronger, more successful projects. While AB 2011 provides for ministerial, by-right approval of affordable housing on commercially zoned sites, as well as mixed-income housing along commercial corridors, our team remains committed to meaningful community engagement. For example, at HumanGood Affordable Housing South San Francisco site, although fully entitled under AB 2011, we have chosen to undertake a community engagement process to ensure alignment with local priorities and build long-term community support. We view the community as a partner in the development process and are committed to building trust, fostering transparency, and ensuring that residents and stakeholders have opportunities to shape the vision for the Carter/Martin site.



Overall Strategy

- **Inclusive Outreach:** We will design a process that ensures voices from all parts of the community are heard, with particular attention to engaging seniors, families, local businesses, neighborhood associations, and historically underrepresented groups.
- **Transparent Communication:** We will provide clear, accessible information about the project timeline, objectives, and potential impacts through multilingual materials, regular updates, and dedicated communication channels.
- **Two-Way Dialogue:** Rather than simply presenting plans, we will actively seek feedback to understand community priorities and concerns, and reflect this input in our design and programming.



Engagement Process

1. **Stakeholder Mapping & Listening Sessions** – Begin by meeting with key local stakeholders (e.g., neighborhood councils, service providers, senior advocates, city staff) to identify priorities and set expectations.
2. **Community Workshops** – Host interactive design workshops and open houses where residents can share ideas, review concept plans, and provide input on amenities, services, and design features.



3. **Ongoing Communication** – Maintain a project website, email updates, and flyers distributed in local gathering spaces to ensure continuous access to information.
4. **Feedback Integration** – Summarize feedback after each milestone and demonstrate how input is being incorporated into design, programming, and services.
5. **Partnerships** – Collaborate with local nonprofits, schools, faith organizations, and service providers to amplify outreach and ensure broad participation.



Commitment to Outcomes

Our goal is to create a project that reflects the aspirations of Daly City residents while advancing broader community needs such as affordable senior housing, high-quality multifamily homes, and supportive services. Through open, ongoing dialogue, we will build not only housing, but also lasting relationships that strengthen the community fabric.





human good



| WATERFORD



ARCHITECTS

