



Affordable Housing Development Opportunity: 1600 W. Commonwealth Avenue

**Request for Proposals
City of Fullerton**

APRIL 12, 2021

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Community center and tot lot at Compass Rose in Fullerton, CA



Jamboree residents



Wesley Village in Garden Grove, CA



Jamboree Housing Corporation
17701 Cowan Avenue, Suite 200
Irvine, CA 92614
Tel 949.263.8676
jamboreehousing.com

April 12, 2021

Mr. Matt Foulkes – Director of Community and Economic Development
City of Fullerton - Community and Economic Development Department
303 West Commonwealth Ave.
Fullerton, CA 92832

RE: Affordable Housing Development Opportunity: 1600 W. Commonwealth Avenue – Request for Proposals

Dear Matt:

As you know, Jamboree has a history of successful public/private partnerships. Working closely with the City of Fullerton to assemble land and obtain financing, we completed the Compass Rose affordable family community in 2019. The development is now the centerpiece of the revitalized Richman Park neighborhood and has helped to create a stronger and healthier community.

In 2019 at the request of the City, Jamboree entered into a purchase agreement and opened escrow to acquire the Fullerton Lucky Motel to revitalize the property and convert it to Permanent Supportive Housing (PSH). Ultimately the cost of the project and the lack of County support required the project to be dropped. Then, at the request of City staff, Jamboree studied the Commonwealth site for an affordable housing development in early 2020. A conceptual plan was developed and utilized by the City to apply for and receive Local Early Action Planning (LEAP) grant funds for revitalization of the Commonwealth corridor. Staff provided constructive feedback and requested that the plan not include any PSH units but rather family workforce affordable – like Compass Rose.

Jamboree looks forward to continuing our beneficial relationship with Fullerton and developing a high-quality successful family affordable housing development that revitalizes the West Commonwealth corridor. We believe our preferred 55-unit workforce development will be the catalyst for future housing and will set a precedent for quality of design and amenities - while helping to meet the City's RHNA allocation and providing housing for all segments of the community.

Jamboree is an award-winning, mission-driven nonprofit community development organization with properties throughout California. Jamboree has engaged in dozens of successful cross-sector partnerships to develop more than 10,000 units of affordable housing. Ranked as California's top nonprofit affordable housing developer in 2019, Jamboree develops, acquires, renovates, and manages affordable rental housing, delivering a range of supportive housing options for families, seniors, veterans, and previously homeless.

Established in 1990, Jamboree currently has \$1.1 billion in permanent supportive housing and affordable projects under development and an estimated \$3.2 billion asset portfolio in more than 96 California communities. Close to 25,000 Californians from San Diego to the Sacramento Area currently call Jamboree home and among them are 2,100 seniors, 700 veterans, and 475 persons with a history of mental health disabilities and experiencing homelessness. Jamboree also has extensive experience developing properties with blended populations of families, seniors, and/or supportive housing.

Michael Massie has full authority to make legally binding commitments on behalf of Jamboree. Scott Riordan will continue to be your direct contact should you have any questions regarding our proposal moving forward. The Jamboree Team looks forward to getting started on the revitalization of West Commonwealth Avenue.

Thank you again for your consideration.

Jamboree Housing Corporation

Michael Massie
Chief Development Officer

Jamboree Housing Corporation

Scott Riordan
Business Development Manager

Jamboree Relevant Experience

About Jamboree

Established in 1990, Irvine, CA-headquartered Jamboree Housing Corporation is an award-winning, broad-based nonprofit community development company with properties throughout California. Jamboree as one of the country's largest developers of affordable housing develops, acquires, renovates, and manages permanently affordable rental and ownership housing for working families, seniors, veterans, and people with special needs.

Jamboree currently has \$1.1 billion in affordable housing projects in its development pipeline and a \$3.2 billion asset portfolio that includes the development of and/or ownership interest in more than 9,000 homes in more than 96 California communities.

Community Impact

As a Community Housing Development Organization (CHDO) at the State and County level as well as various California cities for the past 30 years, Jamboree's mission is to deliver quality affordable housing and services that transform lives and strengthen communities. To fulfill its mission and to maintain a continuum of quality housing and services that are the foundation of its reputation and livelihood, Jamboree fully embraces the principle that the development of premier affordable housing is only the first phase of what will be a long-term partnership and operational commitment with stakeholders and the communities in which the company develops. Jamboree still maintains relationships that date back to its founding in 1990.

Jamboree's Community Impact Group is committed to enhancing the high quality of its housing, with responsive social services and programming that benefits people's lives as well as the environment, the economy, and local neighborhoods, and communities. To this end, the company's primary outreach priority continues to be the advancement of its relationships with local governments/stakeholders and associated agencies and entities.

It is because of this outreach coupled with a commitment to the community that Jamboree is invited back time and again to develop in cities and counties where it has existing affordable properties, thereby underscoring the value of these sustained relationships and the quality of Jamboree's work. Further evidence of Jamboree's strength is the fact that it has been successfully developing and operating affordable housing properties in many different communities and diverse market/economic environments.

As a 501(c)(3), Jamboree's Board of Directors is a guiding force comprised of leaders who draw from an abundance of experience to work together to create quality affordable and workforce housing with services for California communities. With backgrounds in finance, banking, real estate, property management, law and development, board members apply their diverse knowledge to guide the nonprofit into the future with purpose and strength.



Heroes Landing in Santa Ana, CA

Experienced Staff, Proven Results

Jamboree has earned a reputation for taking extraordinary steps to effectively translate the housing vision of localities into reality.

At the forefront of this process is Jamboree's Development Group staffed by a highly experienced team of professionals with exceptional multidisciplinary knowledge, skills, and talents.

This group consistently delivers on the goal of creating quality affordable housing, and producing multifamily properties that are completed on time and on budget and are indistinguishable from comparable market-rate projects. For Jamboree, it is a design requirement that regardless of the location and surrounding environment, its projects must blend seamlessly into the community while also bolstering and enhancing the aesthetic fabric down to the finest grain. With quality as a hallmark, the development team works closely with local jurisdictions to ensure Jamboree's properties and programming serve as a catalyst to help revitalize communities, advance health, initiatives and when applicable, restore and preserve historic landmarks.

As the first step in the development process, Jamboree's professional staff identifies opportunities and analyzes the feasibility of future projects and their contribution to the health and overall benefits they bring to strengthen a community. Once a site is acquired, the Development Group secures financing, entitlements, meets with local stakeholders to build community support, coordinates with consultants on the design and costs to ensure financial and environmental sustainability, and works closely with city staff to secure licenses, permits and approvals. Jamboree is also experienced in development of surplus land and infill parcels of land like Diamond, Monarch and Greenleaf Apartments in Anaheim, adaptive reuse of underused projects such as Wesley Village in Garden Grove and the preservation of historic structures such as the Hotel Berry (now Studios at Hotel Berry) in downtown Sacramento.

A key component of Jamboree's development strategy to improve and streamline the construction process for both new projects and acquisition/rehabilitation projects is the company's in-house construction company, Quality Development and Construction Inc., ("QDC") an independent 501 (c)(3) entity. QDC serves as a licensed general contractor, technical consultant, design expert and construction manager for affordable housing properties developed by Jamboree.

Integral to Jamboree's Development Group, QDC brings specific design and construction expertise to bear throughout the entire development process; it enhances the quality and efficiency in all aspects of new construction at Jamboree communities as well as the rehabilitation of existing properties. This ensures construction standardization across the company's asset portfolio, as well as more cost-effective design solutions, and greater sustainability that maintain quality and affordability vital to Jamboree's commitment for creating housing and benefiting communities and residents over the long term.



Diamond in Anaheim, CA



The Studios at Hotel Berry in Sacramento, CA

As represented by its newer properties that are showplaces of sustainability, Jamboree is firmly and fully committed to energy efficiency and the wise use of natural resources.

The Exchange at Gateway in El Monte, Courier Place Apartment Homes in Claremont and Birch Hills Apartment Homes in Brea are certified LEED for Homes Platinum, the highest LEED rating for residential projects. Also, in Brea, Jamboree's Bonterra Apartment Homes is certified LEED for Homes Gold, the next highest rating, as are Clark Commons and Park Landing Apartments in Buena Park, Doria Apartments in Irvine, Wesley Village in Garden Grove, Rockwood Apartments in Anaheim, Compass Rose in Fullerton, and West Gateway Place in West Sacramento. In Riverside, our Highgrove Blossom Apartments community is GreenPoint rated. Since 2008 Jamboree has frequently been recognized by the U.S. Environmental Protection Agency and the U.S. Department of Energy with ENERGY STAR Regional Awards for Excellence in Energy-Efficient Affordable Housing. Jamboree's sustainability motto is to "Do what we can whenever we can, raising the bar as we go."

Jamboree's Asset Management group is dedicated to maintaining the quality and effective oversight of its properties in the years and decades ahead; a key to the company's strategy of creating valuable housing and programming assets for the communities in which its properties are located. With robust reporting capabilities and a strong sense of pride in exceeding required financial obligations, compliance assurance and asset preservation, our team is unique in delivering mission-focused asset management. Jamboree understands that the development of premier affordable housing is only the first phase of what will be a long-term partnership with the communities in which we develop properties. Given that our long-term ownership often spans 55 years, maintaining the quality and effective oversight of these developments strengthens communities, reduces blight, crime and poverty and is key to them remaining valuable assets to the communities we serve.



Carport solar panels at Courier Place in Claremont, CA



Community garden at Birch Hills in Brea, CA



Compass Rose in Fullerton, CA



Street view of Clark Commons in Buena Park, CA

Project Profiles

Clark Commons

Project Description

8002 - 8004 Orangethorpe Ave
Buena Park, CA 90621

Clark Commons is an affordable housing apartment community that's part of a 12-acre development created with City Ventures and the City of Buena Park. The mixed use development came about due to strong relationships with key community stakeholders and now provides much needed community room space and restaurant dining options not only for our residents but also for the surrounding neighborhood. Through physical design that came about by a collaborative input process from City staff and Council members and intentional programming, this development has become a shining example of how a housing development can become a valuable community resource. Jamboree was able to leverage tax credit financing to build out approximately 3,000 square feet of Community Space and restaurant space for a local small business that had never owned a brick and mortar restaurant but had operated out of the Buena Park Farmers Market.

This development has several amenities and community serving spaces that can be utilized by the community, including:

- Clubhouse
- After School Activity Room
- Physical Fitness Center
- Clark Commons Community Center – with teaching kitchen, multi-purpose room and cubicles for case management and benefit enrollment.

Jamboree uses the Clark Commons Community Center space in in a broad partnership framework to create a collaborative model of services to improve health outcomes for residents of Buena Park. The following partners participate in this collaborative and run programs out of our center:

- City of Buena Park
- OC Health Care Agency
- St. Jude Medical Center
- Buena Park School District
- Mabel Pendleton Elementary School (Buena Park School District)

DEVELOPMENT HIGHLIGHTS

LEED for Homes Gold Certified
Award-winning development
Transit-oriented development
Mixed use development

- North County ROP
- Child Guidance Center
- Community Action Partnership of OC (CAPOC)

A Resident Leadership Academy has been established at this property lead by CAPOC. This group is developing leadership skills, providing feedback on programs, planning and implementing health fairs, and bringing awareness to the community about the walkability of the neighborhood.

YEAR COMPLETED	2016
UNITS	70
AFFORDABILITY	30% - 60%
UNIT MIX AND SQUARE FOOTAGE	
11 One-bedroom	687 sf
37 Two-bedroom	801 sf
22 Three-bedroom	1,102 sf
FUNDING SOURCES	
Bank of America Tax Credit Equity	\$18,410,728
Bank of America Permanent Loan	\$2,971,035
City of Buena Park	\$7,700,000
Accrued Interest	\$226,077
Total Development Costs	\$29,307,840



Transit-oriented Development in Claremont, CA

Project Profiles

Courier Place

Project Description

111 S. College Ave
Claremont, CA 91711

Courier Place, located on the former site of the Claremont Courier newspaper, is Jamboree's first multigenerational community. Built in 2011, Courier Place is one of only a few affordable, multigenerational, multifamily housing developments in California. Local officials took a bold position to support this development. Jamboree went the extra mile in reaching out to residents – a very active citizenry – listening intently to and aligning with the priorities of city staff and residents. Claremont City Council's 5-0 approval of Courier Place underscores the value of a strong public/private partnership in the development of affordable housing, especially in an infill site surrounded by existing neighborhoods.

Courier Place was developed with a multi-layered combination of funding, including first-time financing for a Jamboree community utilizing City of Industry Funds.

Courier Place's unique design concept allows seniors the option to integrate with or enjoy quiet separateness from residents with families. The three-story senior building features 38 one-bedroom apartments, an elevator, a third-floor outdoor roof deck, and hallways lined with handrails for added safety. The two-story recreation space – that includes a kitchen, computer center, library, and outdoor roof deck patio – encourages activities and socialization among seniors. Onsite services are designed especially for seniors – including technology classes to help them keep in touch with friends and family.

The 37 two and three-bedroom family apartments are in two buildings, one of which is non-smoking. Like the seniors building, community areas are designed around the needs of each. For example, the tot lot portion of the common areas is situated at the edge of the central common area core closest to the family buildings, so parents can visually monitor their children from their home and playground noises are minimized for seniors.

DEVELOPMENT HIGHLIGHTS

*Multigenerational
LEED for Homes Platinum Certified
Transit-oriented Development*

YEAR COMPLETED	2011
UNITS	74
AFFORDABILITY	30% - 50%
UNIT MIX AND SQUARE FOOTAGE	
39 One-bedroom	598 sf
13 Two-bedroom	909 sf
24 Three-bedroom	1,172 sf
FUNDING SOURCES	
City of Claremont	\$3,404,871
Community Development Commission of Los Angeles	
- Home and City of Industry Funds	\$2,750,000
U.S. Bank Construction Loan	\$13,000,000
WNC & Associates, Inc. Tax Credit Equity	\$13,228,107
Jamboree Deferred Developer Fee	\$421,757
Total Development Costs	\$19,804,735



Resident pool



Compass Rose part of Fullerton's Richman Park neighborhood revitalization

Project Profiles

Compass Rose

Project Description

312, 324, and 400 W. Valencia Dr.,
411 W. West Ave., and 524 S. Ford Ave., Fullerton, CA 92832

Compass Rose is an affordable new construction development for large families in the City of Fullerton. Located at the southeast corner of West Valencia Drive and South Highland Avenue, the project is a "scattered site" development consisting of 10 individual parcels that have been merged into five lots through the entitlement process.

Over the last 10 years, the City of Fullerton and the former Fullerton Redevelopment Agency invested more than \$22.7 million to buy properties in the centrally located Richman Park neighborhood to eliminate blight and overcrowding as well as bring much needed affordable housing to this north Orange County city. More than 30 properties have been purchased and some have already been developed as affordable for-sale homes. Compass Rose is the affordable rental component of this master plan.

Situated near the heart of downtown Fullerton, the development offers 14 one-bedroom, 20 two-bedroom, and 12 three-bedroom apartment homes in five two-story, garden-style buildings on the 1.76-acre site. Special consideration was made to match the neighboring architecture with a craftsman-style design. The exterior of each of the buildings is a combination of stucco, metal panels and stone accents. The buildings are oriented throughout the site to create a community service center with interior and exterior amenities as the focal point of the development.

Jamboree collaborates with existing community partners California State University Fullerton Center for Healthy Neighborhoods, St. Jude's Neighborhood Clinic, and the Richman Connect Partners to establish a multifunctional community center open for residents to take workforce development classes, health and wellness classes and use for neighborhood safety and community building events.

DEVELOPMENT HIGHLIGHTS

"Scattered site" development
LEED for Homes Gold Certified
Robust resident services

YEAR COMPLETED	2019
UNITS	46
AFFORDABILITY	30% - 60%
UNIT MIX AND SQUARE FOOTAGE	
14 One-bedroom	697 sf
20 Two-bedroom	868 sf
12 Three-bedroom	1,120 sf
FUNDING SOURCES	
City of Fullerton	\$9,742,000
Union Bank Permanent Loan	\$2,288,700
Union Bank Tax Credit Equity	\$10,744,065
Jamboree Deferred Developer Fee	\$148,514
Total Development Costs	\$22,923,279



Craftsman-style design elements seamlessly blend with neighboring housing

Project References

The following key partners can be contacted as references for Jamboree's ability, quality, and track record as a developer of affordable housing. We pride ourselves on our ability to maintain our relationships with state and local government agencies and officials by consistently delivering at the highest possible level to provide affordable housing for their communities.

CITY OF ANAHEIM

James Vanderpool

City Manager
(714) 765-5162
jvanderpool@anaheim.net

CITY OF BUENA PARK

Aaron France

Interim City Manager
(714) 562-3550
afrance@buenapark.com

CITY OF SANTA ANA

Judson Brown

Housing Division Manager
(714) 667-2241
jbrown@santa-ana.org

COUNTY OF ORANGE

Julia Bidwell

Director, Housing & Community Development
OC Community Resources
(714) 480-2991
Julia.Bidwell@occr.ocgov.com



Central courtyard and community garden at Heroes Landing in Santa Ana, CA



Expansive green roof above parking at Park Landing in Buena Park, CA



Community room and management offices at Rockwood in Anaheim, CA

Proposed Development

We understand the West Commonwealth site is constrained by its shape and will require a zone change and General Plan Amendment. We also know our plan will require the accommodation of the continued operation of the Public Works yard to the east.

DESIGN

Stylistically the design is intended to feel urban. We designed the building form to be contemporary with a good mix of premium materials and interesting details. The base of the buildings fronting the street will have storefront glazing with a high percentage of transparency or stoop frontages with the main entries facing the street. This promotes activation, connectivity, and walkability. The street frontage will have a commercial feel and may lend itself to small commercial uses if parking and access can be accommodated – like our Clark Commons development in Buena Park.

PREFERRED 55-UNIT CONCEPT

After listening to comments from the City emphasizing an increased number of units, we've developed a 55-unit plan. Our recommended plan increases the density (31.6 du/ac) within the 3-story concept while utilizing more surface parking. The plan still provides a good amount of open space, but eliminates a walking trail around the site. Each building will be programmed with a courtyard space for soft seating and a BBQ area. The amount of common open space is diminished by a couple of hundred square feet, but adequate space still exists for a tot lot and several other programmable spaces such as a community garden.

INITIAL 48-UNIT CONCEPT

Our initial proposed development consisted of 3-story family workforce affordable apartment homes, with 48 new homes in all. The triangular site is sandwiched between railroad tracks to the south and a wide 4-lane road to the north. Contextually the site feels very urban in nature, so we placed the buildings on the site to address the street - and placed the common areas there as well to promote an activated street frontage. With the buildings fronting the street the pedestrian and vehicular view to the open parking is shielded creating a more interesting walking and driving experience.

The plan provides a good amount of density at 28 du/ac and is designed with a partiality and emphasis on open space and site connectivity by maximizing the tuck-under garage parking. By allowing more garage parking under the building we were able to create a walking path (potential exercise trail) around the perimeter of the site and maximized the amount of open space available to the residents that could be programmed for different uses.



Tot lot and outdoor open space at Clark Commons in Buena Park, CA

THE 61-UNIT ALTERNATIVE

We tested a 61-unit alternative site plan (35 du/ac) which maximizes the density utilizing a 50% State density bonus assuming an R-3 zone change. This concept would require that one building would be increased to 4-stories. We are proposing this extra height be applied to the rear of Building B allowing the design to step down to 3-stories along Commonwealth. This denser scheme would also need approximately 12 additional parking spaces decreasing the common open space by about 4,000 SF. With the limited common open space there would be fewer programmable areas, but there would still be limited room for a tot lot and two small courtyards that allow for soft seating and a BBQ area.

This concept would have a greater impact on the adjoining neighborhoods with a partial 4 story design. It would increase overall costs including the need for an elevator and would reduce recreational open space due to an increased need for surface parking.

Please see the attached Conceptual Density Studies and Street Scene and Imagery.

Elevation



Elevation – West Side Detail



55 Unit Site Plan - Preferred



PROJECT SUMMARY

AREA:	+/- 1.74 AC
UNITS:	55 DU
DENSITY:	31.6 DU/AC
BUILDING:	3-STORY ON GRADE
PARKING:	W / TUCK-UNDER GARAGE 83 SPACES

UNIT SUMMARY

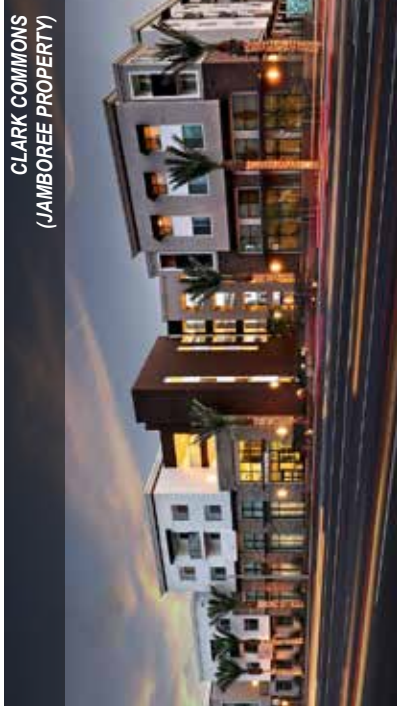
1BR/1BA (+/-590 - 640 SF):	27 UNITS (50 %)
2BR/1BA (+/-760 - 800 SF):	14 UNITS (25 %)
3BR/2BA (+/-975 S.F.):	14 UNITS (25 %)
TOTAL:	55 UNITS (100%)

PARKING SUMMARY

PARKING REQUIRED PER SB 1818	
1.0 SPACE / 1BR UNIT:	27 SPACES
2.0 SPACES / 2 BR UNIT:	28 SPACES
2.0 SPACES / 3 BR UNIT:	28 SPACES
TOTAL	83 SPACES
PARKING PROVIDED:	
OPEN:	56 SPACES
TANDEM:	8 SPACES
GARAGE:	19 SPACES
TOTAL:	83 SPACES



Inspiration Imagery



FULLERTON FAMILY AFFORDABLE HOUSING

INSPIRATION IMAGERY

03

architecture design collaborative
23211 South Pointe Dr
Laguna Hills, CA 92653
www.adcollaborative.com



FULLERTON, CA

04-05-21

ADC #: 20200004

48 Unit Site Plan - Option



FULLERTON FAMILY AFFORDABLE HOUSING

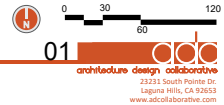
CONCEPTUAL DENSITY STUDY



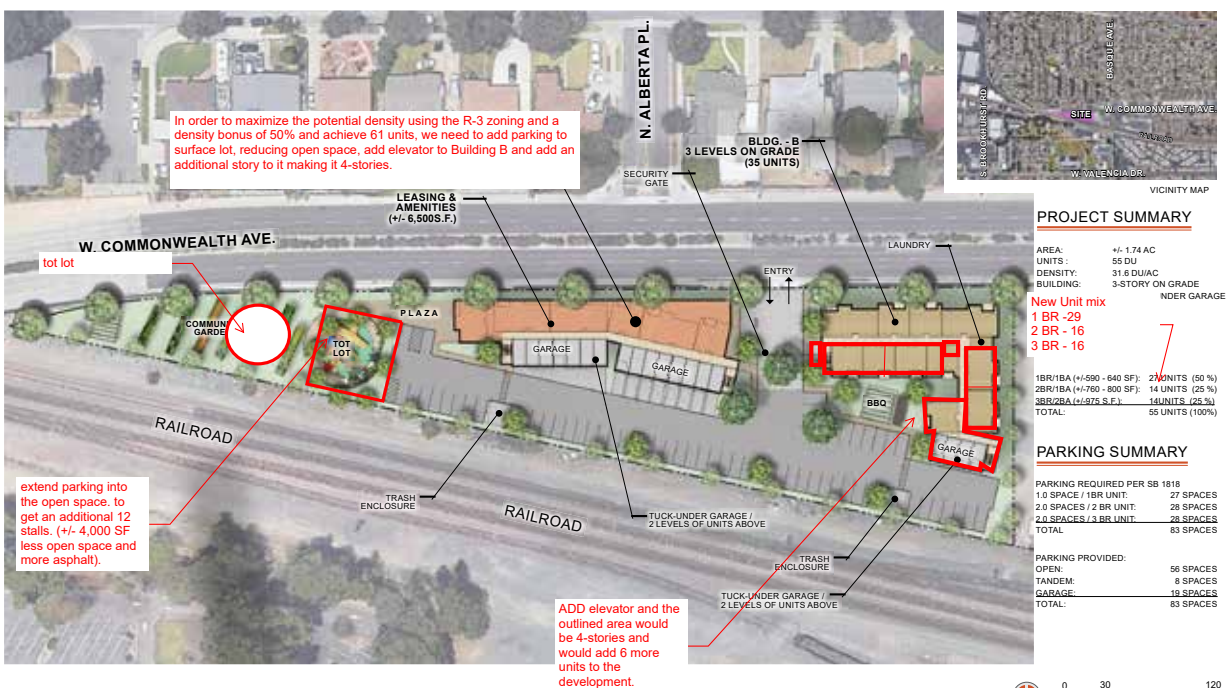
FULLERTON, CA

08-26-20

ADC #: 20200004



61 Unit Site Plan - Option Impact Notes



FULLERTON FAMILY AFFORDABLE HOUSING

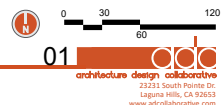
CONCEPTUAL DENSITY STUDY



FULLERTON, CA

01-20-21

ADC #: 20200004





Jamboree residents



Park Landing residents playing on roof top garden in Buena Park, CA



Jamboree resident enjoying her brand-new home at Rockwood in Anaheim, CA

COMMITMENT TO AFFORDABLE HOUSING

Working families are one of the most housing challenged people in our community. We propose that 50% of the units will be focused on providing homes for large families (two- and three-bedroom apartments) across the affordable spectrum. While we have no current plans for Permanent Supportive Housing units in this development, we are open to considering a portion be reserved for those populations in need.

With certain special needs populations, the benefits of Permanent Supportive Housing are augmented by interaction with mainstream neighbors. We have found this model successful particularly for families with children coming out of homelessness, as in our Rockwood development in Anaheim. The integration of populations has been the key to success, along with our partnership with the local school district. We look forward to continuing this discussion with you if desired.

COST SAVINGS

Jamboree families living in Orange County REDUCED use of public resources by:



2018 Survey of Jamboree's Orange County communities

Team Members

Development and Outreach Team for 1600 Commonwealth Avenue Family Housing

The team, dedicated to the Fullerton Commonwealth Family Housing Development, has more than 245 years of combined experience working and partnering with California communities to develop high quality affordable housing.

The City lead contact at Jamboree will remain **Scott Riordan**, Business Development Manager, for the predevelopment process.

Laura Archuleta – President and CEO

- Over 30 years of local government and Affordable Housing leadership
- 22 years leading Jamboree Housing - developing more than 9,000 homes

Michael Massie – Chief Housing Development Officer

- 25 Years of affordable housing experience
- Oversees all aspects of Financing and Development

Business Development

Project Management

Design

Community Outreach/ Resident Services

<p>Liz Tracey <i>Vice President Business Development</i> Manages statewide business planning and advancement - 25 years of experience</p>	<p>Vicky Rodriguez <i>Vice President Housing Development</i> Oversees legislative and funding sources - 16 years of experience</p>	<p>Chris Weimholt, <i>Principal Architect, ADC</i> Architecture Design Collaborative – 20 years of experience</p>	<p>Natalie Reider <i>Vice President Community Impact</i> Administers all resident services at family properties – 15 years of experience</p>
<p>Scott Riordan <i>Business Development Manager</i> Directs City partner coordination and pre-entitlement – 25 years of experience</p>	<p>Tung “T” Tran <i>Senior Director</i> Supervises project management and financing - 19 years of experience</p>	<p>Marie Delwiche <i>Design Manager, ADC</i> Coordinates entire design team - 10 years of experience</p>	<p>Ben Sanchez <i>Sr. Community Impact Manager</i> Leads services and collaborations for Fullerton – 6 year of experience</p>

Economic Plan



Union Bank financed West Gateway Place in West Sacramento, CA



U.S. Bank financed Park Landing in Buena Park, CA



Rockwood Apartments in Anaheim, CA constructed by QDC

Economic Plan

Despite the many challenges to produce affordable housing to meet the needs of millions of California residents, the affordable housing industry continues to find creative solutions to meet these challenges.

Jamboree is one of the leading affordable housing developers in the state using creative financing solutions to change the way affordable housing is produced.

Over the years, Jamboree has received \$420 million of tax credit equity through the 4% and 9% state tax credit programs, \$220 million of bond financing, and \$25 million of HOME funds. Despite the loss of redevelopment funding in California, Jamboree has consistently been able to secure alternate financing from multiple local and state resources.

Our corporate financial stability combined with prudent budgeting and low corporate debt help mitigate business risk amid challenges in the industry and economy. Jamboree enjoys strong capital relationships with commercial lenders such as Bank of America, Union Bank, U.S. Bank, and Chase Bank. Jamboree receives offers of debt and equity pricing and credit terms that are indicative of our financial stability. Jamboree has also experienced great success with the projects that have been awarded by RFP, never failing to win a tax credit allocation for an eligible project.

BASIS OF PROJECT COSTS

The proposed development as shown in our pro forma has a total development cost of \$24,674,861 with hard costs making up the majority. Construction cost pricing was provided by QDC, our in-house general contractor. Hard cost pricing also reflects comparable projects Jamboree is currently working on in Orange County, and we are confident on the accuracy of our construction cost estimates. We are setting aside 8% for hard cost contingency to cover any potential increases in site costs, including those associated with grading and on and off-site infrastructure.

FINANCING PLAN

Jamboree proposes to finance the Fullerton affordable housing development by leveraging 9% tax credit equity with funding from the Affordable Housing Program (AHP), Orange County Housing Finance Trust (OCHFT), Permanent Local Housing Allocation (PLHA), Infill Infrastructure Grant Program (IIG), 8 Project Based Vouchers, a proposed Impact Fee Note from the City of Fullerton, City of Fullerton Housing Funds, permanent mortgage financing, and deferred developer fee. Jamboree would purchase the property from the City for \$3 million through a residual receipts loan with a 55-year term.

Our financing approach seeks to leverage key linkages to create a successful financing plan that ensures the long-term financial health of this community. Our proposal will deliver a wide range of affordability, serving income levels from extremely low income (30% AMI) to low-income (60% AMI), with a mix of unit types from 1-bedroom to 3-bedroom units.

Jamboree is very familiar with the proposed soft funding sources, and has financed numerous projects with 9% tax credits, making us very adept at creating a project unit mix that will compete well for these competitive credits. We have also been successful in securing OCHFT, IIG, and AHP funding, all of which are competitive funding sources.

UNDERWRITING

The underwriting for this project meets all the requirements for TCAC, CDLAC, and the proposed soft funding sources. The income distribution range is from 30% to 60% AMI, which positions the project to be highly competitive in the 9% Low Income Housing Tax Credit Program. We are assuming a tax credit price of 90 cents per credit, reflecting a 9% fixed credit rate. The soft funding sources are sized based on their guidelines and loan limits. We have sized the permanent loan assuming a 1.15 debt service coverage ratio and a 5.00% interest rate.

CITY ECONOMIC BENEFITS

There are additional economic benefits of creating an affordable housing community. According to the National Association of Home Builders, 55 affordable rental homes generate:

During Construction

- 93 local jobs
- \$1,827,540 in taxes and other revenue for local governments
- \$6,807,800 in local income

Post Construction

- 27 jobs
- \$462,900 in taxes and other revenue for local governments
- \$1,624,300 in local income



Rendering of Finamore Place in Anaheim, CA financed in part by OCHFT



Unit interior at Wesley Village in Garden Grove, CA



Construction at Birch Hills in Brea, CA

Proforma Summary

Fullerton RFP

Summary

9% - State Credits, IIG, PLHA, AHP, OCHTF, 8 Project Based Vouchers

Unit Mix and Rents

Revised:

4/12/2021

BEDROOMS	SF	UNIT MIX UNITS	MGR	PERCENT	MONTHLY		AVG NET	ANNUAL GROSS INCOME
					AVG GROSS	UTILITY ALLOWANCE		
1	650	27	0	49%	1,130	64	1,066	345,288
2	850	14	0	25%	1,472	86	1,386	232,800
3	1,025	13	1	25%	1,678	110	1,568	244,584
TOTAL		54	1	100%			1,340	822,672

Source Of Funds

PERMANENT SOURCES	PERCENT	TOTAL	DEBT SERVICE
Net Investor Equity (Federal)	32%	7,993,901	N/A
Net Investor Equity (State)	7%	1,749,825	N/A
Permanent Loan	25%	6,084,435	367,952
Infill Infrastructure Grant (IIG)	10%	2,506,700	N/A
City of Fullerton	2%	450,000	N/A
Impact Fee Note	4%	900,000	N/A
Affordable Housing Program (AHP)	2%	610,000	N/A
Orange County Housing Finance Trust (OC)	4%	880,000	N/A
Permanent Local Housing Allocation (PLH/	2%	500,000	N/A
Land Donation	12%	3,000,000	N/A
TOTAL SOURCES	100%	24,674,861	367,952

Income Mix

AMI	NO. UNITS	PERCENT
30%	9	16%
40%	9	16%
45%	6	11%
50%	6	11%
60%	24	44%
TOTAL	54	98%

Use of Funds

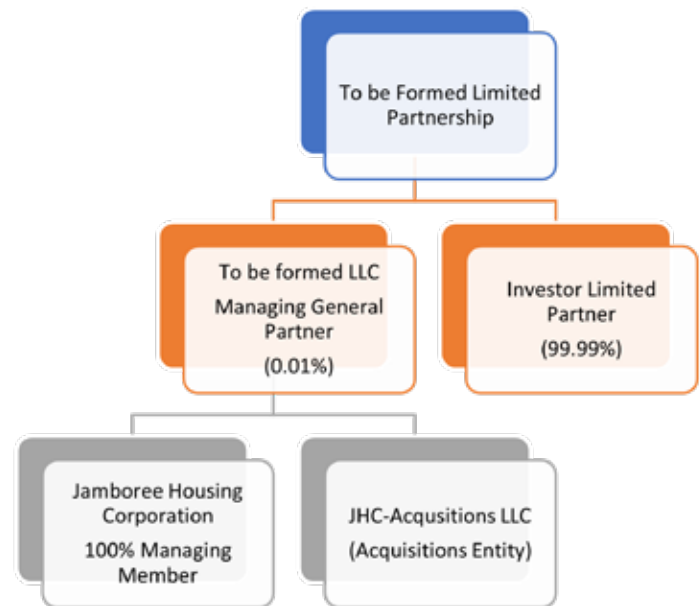
USES OF FUNDS	TOTAL	PER UNIT
Land / Acquisition Costs	3,000,000	54,545
Hard Costs	14,831,100	269,656
Loans and Fees	759,422	13,808
Soft Costs	6,084,339	110,624
TOTAL DEVELOPMENT COSTS	24,674,861	448,634



Jamboree's 2020-2021 housing production and funding chart

Transaction Terms and Conditions

Jamboree Housing Corporation, a nonprofit 501(c)3 public benefit corporation is the proposed project's applicant and developer and would expect to remain a part of the final ownership structure throughout the low-income use period of the proposed development.



Upon allocation of tax credits, a Limited Partnership (LP) will be formed that will include a tax credit investor as Investor Limited Partner (ILP) with 99.99% Ownership Interest; the ILP will be admitted into the LP at construction loan closing. The LP will also include a to be formed Limited Liability Company (LLC) entity as Managing General Partner (MGP) with 0.01% ownership interest. This de minimis fractional ownership by the MGP allows the majority of the tax credits and other benefits, such as depreciation and amortization, to flow to the ILP in exchange for the tax credit investment into the Project.

The MGP will be controlled by Jamboree and assume all the standard responsibilities of a managing partner of a Section 42 Tax Credit development, including but not limited to, oversight of pre-development and development responsibilities, construction management, supervision of leasing activities, and ongoing asset management. As shown in the ownership structure chart, the MGP is owned by Jamboree and JHC-Acquisitions.

The MGP will remain in the ownership structure throughout the development and operating phases (including the 15-year tax credit compliance period) of the project. The managing and sole member of the to be formed LLC will be Jamboree Housing Corporation.

JHC-Acquisitions LLC would serve as the entity that would obtain site control through the Affordable Housing Disposition and Development Agreement (DDA). JHC Acquisitions LLC is wholly owned by Jamboree Housing Corporation.

Projected Development Schedule

Milestone	Preliminary Timeline
RFP Selection Process	
RFP Selection Committee Approval	June-21
Enter Exclusive Negotiating Agreement	July-21
Conduct Stakeholder and Community Outreach	September-21
Enter Disposition and Development Agreement	December-21
Entitlements and Environmental Clearance	
Submit for Entitlements	December-21
Entitlements Approval	December-22
Environmental Clearance: CEQA (NEPA, if necessary)	December-22
Financing	
Submit Infill Infrastructure Grant (IIG) Application	April-22
Submit Affordable Housing Program (AHP) Application	April-22
Submit Orange County Housing Finance Trust (OCHFT) Application	April-22
Submit Permanent Local Housing Allocation (PLHA) Application	April-22
City Funds Encumbered	December-22
Receive Soft Funds	December-22
Submit Application for 9% Tax Credits	March-23
Receive Tax Credit Allocation	June-23
Disposition of Property	
Close on Construction Financing	December-23
Construction Period	
Commence Construction	December-23
Complete Construction	March-25

Community Outreach and Engagement

Resident and Community Services

Jamboree has been active in more than 35 communities throughout California with programs to serve families, special needs populations and senior citizens and at the same time improve the lives of residents in adjoining neighborhoods and the entire community. Called our Community Impact Initiative, the investment in a Jamboree community goes well beyond the housing itself.

As we have done in the Richman Park neighborhood with our Compass Rose development, we intend to use our well-designed and managed housing developments to provide a platform of opportunity along the Commonwealth Ave. community and within the Adlena Park Neighborhood.

What successes and impacts has Jamboree had in Fullerton at Compass Rose?

- When Compass Rose was being built, Jamboree partnered with NeighborWorks and provided a series of credit improvement workshops for the residents in the area that wanted to improve their credit score to apply for Compass Rose. Over 35 residents attended the series.
- Working with Fullerton PD's Community Liaison Officer to create a neighborhood watch in the community, Jamboree invited residents from the other apartment complexes to join the cause.
- Monthly meetings are scheduled with residents and local organizations are invited to share what programs are being offered.

- Jamboree collaborated with Fullerton's Resident Leadership Academy (RLA) and the CSUF community center to participate in a park clean up.
- The Jamboree Community Impact Manager for Fullerton was recently recognized by Sharon Quirk-Silva, Ahmad Zahra & Jesus Silva, a representative from Doug Chaffee's office, a representative from Josh Newman and the state senate, and Dr. Jones from the CSUF Richman Community Center for his work during the Covid 19 Pandemic. They called the award "Buenos Hombres" honoring the men that serve their community.

This investment helps all members of the community grow stronger and healthier. Jamboree will work with the stakeholders in this Fullerton neighborhood to assess its unique strengths and challenges, and our subsequent services will be built upon those strengths and will help to address those challenges.

Jamboree has strong and expert skills at direct service delivery in many categories, such as out-of-school time programs that build social and emotional learning capacity in children. We are well known through our collaboration across Orange County with health care systems and hospitals, County agencies, non-profit organizations and most importantly work with neighborhood residents to design our service plans.



Ample resident services space at Compass Rose in Fullerton, CA

A More Innovative and Comprehensive Community Impact Initiative

Jamboree provides a comprehensive, multi-layered services program that is designed specifically to respond to the identified needs of our residents and the surrounding neighborhood. Our goal is to understand the people who live in the in the Commonwealth Avenue and Adlena Park neighborhoods and their interests. We believe understanding the community is essential to making a positive impact in the neighborhood.



Zumba station at the Clark Commons health fair in Buena Park, CA

The goal of Jamboree's Community Impact Initiative is to improve the overall health and well-being of the community – thus making it stronger.

We define "community health" by accepted metrics that include improving access to quality physical and mental health services, improvement in educational outcomes, improved social bonds, increasing access to open space, parks and recreation facilities, and an increased feeling of security within the members of the community. Where possible, we not only provide services for the residents within the communities we develop but also make these service investments as well as the community-services spaces that are a part of our development a benefit to the surrounding community and neighborhood. This gives Jamboree the best opportunity to improve the life of the community by addressing its real needs and by providing social, education and health-supporting programs that have the best chance of being sustainable and successful. We believe that, where this approach is feasible, it reflects a development that benefits the entire neighborhood.

Our community services approach has three components:

1. Service facilities are integrated into the proposed development design;
2. Jamboree designs a services plan that will be put in place with onsite staff to respond to the unique needs of the households who will be living in the development as well as the residents living in the immediate area and;
3. Leveraging Jamboree's high-capacity collaborative Orange County service partners to occupy integrated & customized facility spaces within the development and managed by our staff.

Our highly successful experience with this model in locations throughout Orange County, including Richman Park in Fullerton, confirms that our process of including resident voices in the design of these services is very successful. Our experience also confirms that improvements and innovation happen when stakeholders – including residents, healthcare providers, education, and community partners – all work together toward a common goal. While we outline a general service plan, we also have a commitment to continuously respond to resident needs and create meaningful programs and activities.



National Night Out at Rockwood in Anaheim, CA



Local community service provider offices at Wesley Village in Garden Grove, CA



Head Start learning center at Wesley Village in Garden Grove, CA



On-site Resident Services Coordinator overseeing after-school program



Jamboree hosted food distribution event for residents

Description of Services Plan

Jamboree embraces the principle that the development of quality affordable housing is only the first phase of a long-term partnership with stakeholders and the communities we are members of. Our successful experiences in Fullerton demonstrates that we must evolve and adapt to community needs from the very start of development until long after construction is complete. The stability and long-term success of the larger community is made possible through the impact of resident programs, the engagement of the residents themselves and the integration of available community partners. Since 2001, Jamboree developed in-house Resident Services experts – one of the industry's first – that fosters learning, healthy living, and community building for residents through onsite educational and social programs and services tailored to residents' needs.

The following service plan is designed to describe a best-practices program and service design that addresses the critical needs of working families. These services are provided at no cost to the residents of the development or other participants who may engage from the surrounding neighborhood. The specific plan will be developed following extensive analysis of neighborhood needs consistent with our practice.

STAFFING PLAN

A Resident Services Coordinator will be placed onsite, and his/her primary duties will be to implement and coordinate programs and services contained in this proposal.

Critical job duties are as follows:

- Develop and implement the proposed program plan designed to address the goals and outcomes identified in the Community Needs Assessments and resident surveys.
- Coordinate with local partners to run or augment youth development/after school programming.
- Survey and interview residents to evaluate the effectiveness of the on-site services staff.
- Provide direct coordination of services, resource and referrals to local and onsite services, public benefit programs, and other community resources.
- Identify barriers to complete provision of services needed by participants and effectively problem-solve to resolve these issues, anticipating how to address these barriers.
- Compile data that demonstrates improvement in areas identified for each property in the Service Plan.

AFTER SCHOOL PROGRAM

Jamboree either self-delivers an After School Program or works with local partners to provide a program that meets the needs of low-income and at-risk children and youth by giving them with a stable environment that promotes healthy growth and development. The program design is built around developing what author and expert on poverty and childhood, Paul Tough refers to as “soft skills”—the social and emotional skills needed to live successfully with others in our society (“How Children Succeed,” 2012).



After school program at Clark Commons in Buena Park, CA

While the program’s implementation is customized for each site’s population, we base all activities on “The Quality Standards for Expanded Learning in Public and Affordable Housing” from the Partnership for Children & Youth’s HousED Initiative. Jamboree has developed the following five program elements based on these standards:

1. Establishing a safe and supportive environment, which enables academic achievement and relationship-building.
2. Ensuring the activities of the program are meaningful and relevant to participating children and youth.
3. Building skills with a focus on the development of social and emotional skills.
4. Facilitating active and engaged learning.
5. Engaging children and youth in new experiences to broaden their horizons.

We will develop any youth programming in concert with existing neighborhood programs to see how to best coordinate any amenities we build into our property to be best served by the community.

ADULT SOCIAL AND ECONOMIC PROGRAMS

Jamboree will partner with local communities and/or self-deliver culturally and linguistically sensitive health and human services to underserved populations. Relevant adult educational workshops and programs will be provided to the residents of this development and surrounding community and may include:

- Vocational English training (ESL classes)
- Employment Services
- Tax Services
- Emergency Financial Assistance
- Healthcare Access

SOCIAL PROGRAMS

Jamboree will organize community building activities such as holiday events, cultural awareness activities, game nights, and movie nights to build community onsite.

Early, Committed and Ongoing Community Engagement

Jamboree conducts an extensive analysis of the neighborhood in which we will work to ensure that our housing and supportive services meet the needs of the individuals who ultimately become our residents and neighbors. We develop our amenities and services that will listen to the community voice and remain engaged with the neighborhood well beyond the development and construction of this property.



Community meeting at Wesley Village in Garden Grove, CA

As part of our Compass Rose development, we conducted a Community Needs Assessment in partnership with CSUF Center for Healthy Neighborhoods, Habitat for Humanity and St. Jude Community Clinic. As a result, we designed our community center at Compass Rose with the neighborhood in mind to be an accessory to the existing Richman Community Center (RCC). For example, we understood that the RCC’s after school program was full, so we took their waitlist of youth and provided coding classes with partner agency Dreams for Schools. We also provide exercise classes, adult education classes, and other neighborhood programming at our center that anyone can join in and attend for free.

Additionally, one of our Community Impact staff has been Board President for three years for the RCC. This board has created a 3-year strategic plan for improving the neighborhood and designs/oversees education, health, and community empowerment programming. Partners on this board include:

- 4 – 5 Community residents
- Local small business owners
- Fullerton Police Dept
- Fullerton School District
- CSUF Nursing Program
- St. Jude Community Clinic
- Kaiser Hospital
- Community nonprofits

As one of California's largest non-profit housing developers, Jamboree has extensive experience engaging with residents and community leaders in the development of affordable housing. Jamboree believes community input, from elected officials and the wider community, leads to better developments that are well integrated into the surrounding neighborhoods. Jamboree creates a Community Engagement Strategy for each new project whether a city or county requires a community engagement plan or meeting. The process focuses on four main elements:

1. Regional Overview
2. Community Landscape
3. Education
4. Community Mobilization



Jamboree staff member recognized for his work in Fullerton, CA

Regional Overview

During predevelopment of any new community, Jamboree researches the region and its community resources. In areas like Fullerton, residents, businesses, and community organizations are connected to wider population and job epicenters. Having an expansive approach to community engagement in the region, allows Jamboree to engage with the community in ways that reflect actual resident experiences with surrounding communities. Jamboree understands that while this development may be in Fullerton, meaningful community outreach must engage broad cross-sections of the community.

When creating this section of the Community Engagement Strategy, Jamboree evaluates demographic data that could influence the future housing development and the overall community engagement strategy. Jamboree looks at data points like race, gender, age, income, employment data, homeownership status, number of people experiencing homelessness and housing instability, etc. These data points allow Jamboree to better understand the needs of the community and how the proposed housing development can help address those needs. Additionally, the demographic data gives Jamboree a better sense of the potential, future residents that the property will most likely serve. These potential, future residents are also engaged in the Community Landscape, Education, and Mobilization phases of Jamboree's Community Engagement Strategy.

Community Landscape

After completing the Regional Overview analysis, Jamboree then evaluates the Community Landscape in order to identify groups likely interested or impacted by the proposed affordable housing development. Jamboree identifies local organizations like churches, schools and universities, local businesses and chambers of commerce, homeowner associations, and other civic organizations. Depending on local municipal requirements and anticipated issues of concern, Jamboree may engage these groups in one-on-one settings to address concerns and build support. At a minimum, these identified groups are invited to any public community outreach meeting Jamboree hosts.

Jamboree works collaboratively with municipalities to identify these organizations, knowing that local elected officials and their staffs have a unique understanding of the community critical to navigating local roadblocks. Examples of this process would include groups such as Richman Park Collaborative. Similar organizations, including organizations that specialize in outreach to multi-lingual and bi-lingual communities, would be involved in opportunities to develop a new community.

Additionally, during this phase Jamboree engages and informs elected and other public officials. Depending on the preferences of the municipality, Jamboree can provide one-on-one briefings for elected and public officials, or partner with the municipality on study sessions or forums geared toward engaging, educating, or addressing the concerns of a specific group of people. These meetings typically happen prior to education of the wider community to ensure that elected and public officials have all relevant information prior to the public being briefed on the proposed housing development.

Education

A cornerstone of Jamboree's Community Engagement Strategy is education. During the education phase of the Community Engagement Strategy, Jamboree works to provide information that combats misconceptions about affordable housing, addresses design and long-term management concerns, and familiarizes the community with Jamboree's mission, values, and experience in affordable housing development. Jamboree believes that this educational information is best received when delivered in person, but our robust Marketing and Communications team can distribute this information in multiple languages in both printed and digital formats through written notices, announcements and invitations or virtual meetings, social media, newsletters, editorials, and on Jamboree's corporate website.

Jamboree also ensures that all community outreach materials are available on the corporate website for residents who are unable to attend in-person. Residents can also submit questions regarding a future development through the corporate website. Examples of these online resources can be found here: <https://www.affordablehousingpipeline.com/blogs/california-affordable-housing>.

Community Mobilization

If the proposed housing development is subject to public hearings, the last step of Jamboree's Community Engagement Strategy is to mobilize community supporters to encourage approval of the project. Housing developments, regardless of where they are located, often draw opposition from residents and surrounding neighborhoods. As Jamboree executes the Community Landscape and Education phases of the Community Engagement Strategy, existing and new advocates for affordable housing are identified. Once identified, Jamboree works with these advocates to help the proposed development reach final approval. This advocacy program has been developed to better educate local communities with information and to become advocates for effective solutions.



Highgrove Blossom residents in Highgrove, CA



Residents of Doria in Irvine, CA



Residents at Rockwood in Anaheim, CA

Marketing Plan for Fullerton Residents

Affirmative Fair Marketing Procedures

Jamboree Housing Corporation (the "Owner"), and Quality Management Group will comply with the provisions of the California Department of Housing and Community Development (HCD) affirmative fair marketing guidelines, and as applicable, other Federal, State and Local law prohibiting discrimination in the lease or rental or in the use, occupancy or tenure of enjoyment of 1600 West Commonwealth, or any part thereof on the basis of marital status, race, color, religion, ancestry, sex, gender identity, sexual orientation, age, national origin, HIV, Acquired Immune Deficiency Syndrome (AIDS) or AIDS related condition (ARC), physical handicap, or on the basis of their receipt of, eligibility for, housing assistance programs or on the basis that the resident have a minor child or children who will be residing with them or any other arbitrary basis. 1600 West Commonwealth (the "Project") or any person claiming authority under or through them will not establish or permit any such practices of discrimination or segregation with references to the selection, location, number, use or occupancy of residents or lessees in the Project. All criteria shall be applied equitably and all information considered on an applicant shall be related solely to the attributes and behavior of individual members of the household as they may affect residency.

All rental advertisements will bear the fair housing logotype and slogan, and any information sheets will also indicate accessibility to the disabled. A Fair Housing poster will be conspicuously displayed in the rental office and where the initial rent-up process will occur.



Property Manager assisting residents at a Jamboree community

Procedures to Provide Accessible Units to People With Disabilities

1600 West Commonwealth, the Owner, and Quality Management Group will take reasonable steps to maximize the utilization of accessible units by eligible individuals whose disability requires the accessibility features of the particular unit. To this end, any vacant, accessible unit will first be offered to a current, disabled tenant of the development. The disabled occupant must require the features in the vacant unit and must be occupying a unit not having such features. If no such occupant exists, the property manager will then offer the unit to a qualified occupant on the waiting list who has a disability requiring the accessibility features of the unit.

The application will include a section to be filled out by applicants requesting an accommodation with details on the applicant's special needs for accessible features or other accommodations. Applicants will not be required to disclose a disability under any circumstances unless requesting accommodation. Special outreach efforts will be made to the disability community through notices describing the availability of all units, specific information regarding the availability and features of accessible units, eligibility criteria, and application procedures.

Marketing and Community Outreach Activities

Marketing and outreach activities include the following:

1. Media & Internet advertisement
The Project will be advertised with a site banner and in the following publications and websites:
 - Orange County Register
 - Outreach to local business and existing Fullerton Residents
2. Marketing materials to be provided in multiple languages
3. Flyer Distribution and postings will be made available in local community centers and government offices

Summary of Unit Mix

- **Fifty-Five (55)** units are set-aside for low-income applicants
- **Twenty-Seven (27)** one-bedroom units are set-aside for low-income applicants
- **Fourteen (14)** two-bedroom units are set-aside for low-income applicants
- **Fourteen (14)** three-bedroom units are set-aside for low-income applicants

Timeline and Details for Outreach And Marketing

Marketing and outreach efforts will begin approximately 10 months prior to the Project completion date to ensure a timely lease-up.

Applicants will have approximately three weeks to return the applications and participate in an initial lottery. Applications received after the lottery deadline will be placed on the waiting list in the order they are received.

Implementation Timeline and Marketing Activity

AUGUST 2023

Quality Management Group will establish an interest line for the Project. The line will be advertised and available during construction.

The recording for the General Public interest line should include the following:

"Thank you for calling the information/application line for 1600 West Commonwealth.

This community is scheduled to open in June 2022 and is in Fullerton, California. We will offer 1, 2, and 3- bedroom apartment homes.

Applications will be available starting February 2022. To receive an application by mail please provide your contact information including name, phone number, and e-mail address.

Applications received in the mail will be entered into a lottery. Applications received after this date will be placed on the waiting list in the order they are received.

We are an Equal Opportunity Housing Provider. Income and Other Restrictions Apply."

Application material prepared

- Marketing Plan
- Application will be uploaded to owner website, if possible

Affordable applications (General Public) will be instructed to mail back to Quality Management to enter the lottery and/or waiting list.

SEPTEMBER 2023

All marketing materials need to be approved and signed off by the owner.

Order applications, banner, and flyers for General Public units in multiple languages. Place Ads in papers, Construction Sign or banner for General Affordable units, and mail one flyer to all agencies.

NOVEMBER 2023

- Application available on the website
- Outreach to local business with flyers

JANUARY 2024

Deadline to receive pre-applications by mail to participate in the initial lottery. All applications received after January 23, 2024 will be placed in the order they are received following the last applicant in the initial lottery. We don't anticipate closing this list. However, if the number of applicants exceeds 500, the waiting list will close.

The Owner is to provide office space for the on-site manager during the pre-rental period.

Electronic lottery conducted via random selection script.

FEBRUARY 2024

Start interview process. Invitations to schedule an appointment will be sent out in writing. 1600 West Commonwealth will consider applicants who fail to respond or who don't show up for the scheduled interview to be no longer interested. However, the applicant will remain on the waiting list as inactive with a chance to re-activate their status for a period of one year.

JULY 2024

Offering of units begins.

MAY 2025

75% occupancy

JULY 2025

100% occupancy

Application Process (General Public Units)

1. 1600 West Commonwealth will advertise the opening of the rental application period following the marketing and outreach procedures listed.
2. All pre-applications received during the period advertised will be pooled and assigned a reference number; applications will be randomly sorted within an Excel spreadsheet and assigned a place on the interview waiting list for all unit types.
3. General Public pre-applications will be instructed to be mailed directly to Quality Management Group.
4. After the initial lottery period, rental applications will still be available by mail under the same guidelines or for pick up at the temporary office and by mail for people unable to participate due to a disability. A TDD number is also provided on all materials.
5. The following will disqualify any application:
 - Sending in more than one application;
 - Incomplete or unsigned application;
 - Application not returned via first class US mail (i.e.; fax, overnight express, express mail, hand delivery).
6. We will send a postcard to all applicants (to the primary address provided on the application) with a confirmation of their lottery number for the waiting list.
7. Each prospective resident will receive a letter requesting an interview, complete with a Rental Application and an interview checklist in accordance to lottery order.
8. Ineligible applicants will receive a denial letter. All denial letters will describe the reason for ineligibility as well as appeal protocol.

Any applicant that fails to respond to a notice or who doesn't show up for the scheduled interview will be considered no longer interested. These applicants will remain on the waiting list as inactive with a chance to re-activate their status for a period of one year. 1600 West Commonwealth is subject to income limits that are published annually by HUD and available to the public from the property office. These income guidelines are subject to change. An applicant's household combined gross annual income cannot exceed the published Area Median Income (AMI), depending on the income restriction for the unit for which a household is applying.

Interview Procedure

At the time of the interview, all members of the household must be in attendance. They will be asked to bring at minimum the most recent three months' pay stubs, if employed, income sources, assets, and previous rental history. Other documents or identification to determine household composition, income, and assets may be requested. During the interview, staff will clarify any information provided by the applicant household and answer questions regarding admission procedures.

At the interview, the following items will be completed by or obtained from the household:

1. Credit/Criminal Release Form: A credit report indicating financial responsibilities and a comprehensive unlawful detainer check will be obtained for each adult applicant. If the household meets the credit criteria a criminal report will be requested, and they immediately will move to the next step.
2. A Tenant Income Certification Questionnaire form completed by each adult.
3. Applicant shall execute any releases and consents authorizing any private sources of income, or any federal, state, or local agency, to furnish or release to management such information as management and the applicable program regulations determined to be necessary.
4. All income will be verified in writing from the income source on appropriate income verification forms. For recipients of Social Security income or public assistance, current Notice of Action letters or Statement of Benefits will be accepted.
5. All assets, including bank accounts, will be verified in writing from the financial institution.
6. Reachable current and previous landlords will be contacted by mail or fax for information concerning the history of complying with lease requirements, payment records, destruction of property or interference with the rights of others, unhealthy or unsanitary conditions. Absence of prior rental history will not automatically disqualify an otherwise eligible applicant; however, we may request alternative means of verifying prior residence or lack of residence, as well as request provision of personal references.
7. Applicants will be asked to verify their student status to ensure compliance with tax credit requirements.
8. Submission of an application and attendance at an interview does not indicate the offer of a unit or acceptance for housing. Formal determination of eligibility will be made when an appropriate unit is available, and all information is verified.
9. Once the final application review requirements have been satisfied, approved prospective residents will be notified and a request to provide a deposit to hold a specific unit will be issued.
10. A waiting list will be established for those applications not processed. These applicants will periodically be contacted to confirm their interest in remaining on the waiting list. As vacancies occur, they will be filled by households on the waiting list.
11. Quality Management Group will prepare welcome packages for the new residents.
12. May 20, 2025, initial move-ins to begin and the on-site leasing office will open. A resident orientation will be held.
13. June 01, 2025, 100% occupancy achieved.

Ongoing Advertising

Once sufficient interest in the property is generated advertising will occur on an as-needed basis.

Property Management Team



Over the past 25 years, Quality Management Group, the property management division within the LaBarge suite of companies, has been recognized as one of the leaders in affordable housing management in Southern California, ranging from smaller apartment communities to larger housing communities of several hundred units. Quality Management Group offers the services of a large management company, with the personal touch and customization of a smaller company. We currently provide management and compliance services for more than 3,000 affordable units throughout Southern California.

Quality Management Group understands the importance of maintaining proper regulatory compliance within the affordable housing community. In addition, we have worked with property owners to successfully navigating the complicated development processes such as multi-layered financing models, land entitlement, acquisition/rehab projects, lease-ups and the management of new construction.

Our professional staff is trained on a variety of affordable housing types, and can respond to the owners needs from a diverse source of government funding platforms, such as: California Tax Credit Allocation Committee (CTCAC) Project Based Section 8 Vouchers, Neighborhood Stabilization Program (NSP) I and II, Community Development Block Grant, HOME, and Redevelopment set-aside funding. As regulations are updated, our professional staff receive on-going training and education to ensure property under our care receives outstanding inspection and audit reviews from local, state and federal agencies.

At Quality Management Group, we partner with organizations, cities and other developers to bring quality living options to residents throughout Southern California. Our goal is to work together to improve our communities and the lives of people who call this region home.

Here's a partial list of our Quality Partners:

- City of Fontana
- City of Rialto
- City of Pomona
- City of Long Beach
- City of Perris
- AOF/Pacific Affordable Housing Corp.
- Jamboree
- Boys and Girls Club of Fontana
- National CORE
- All things are Possible
- Related California
- WNC
- Family Services Association
- EHDOC

3.6% DELINQUENCY RATES
BEATING THE INDUSTRY AVERAGE

5 DAYS UNIT TURN TIME
THAT BEATS THE INDUSTRY AVERAGE



50% 2019 GROWTH

\$2.16 AVERAGE SQUARE FOOT UNIT TURN COST

100% SATISFACTION RATE



Key Staff

Joshua LaBarge **President/CEO**

For over 35 years, Joshua LaBarge has been a catalyst in the housing community, offering a new vision for affordable housing in California. By providing exceptional service, timely communication, responsiveness, accurate reporting, and proactive maintenance, Mr. LaBarge has reset expectations for quality affordable housing developments. Both independently and in partnership with investors and business partners, he has been responsible for the development of over 3,000 low-income multi-family and senior housing communities in Southern California. Mr. LaBarge has also acquired and rehabilitated more than 1,500 multi-family units and developed new single-family homes to help revitalize distressed neighborhoods.

In 2017, Mr. LaBarge was awarded the Best Affordable Housing Community under 30 dwelling units per acre and the Sage Award for the Best 55+ Community for the Bloomington Grove/Lilian Court project. He holds certifications in residential and commercial property management and is affiliated with the Building Industry Association, California Realtors Association, American Institute of Architects, and the League of California Cities.

Tim Johnson **Chief Operating Officer**

As Chief Operating Officer for Quality Management Group, Tim Johnson is responsible for the development and implementation of strategies and tactics that help Quality achieve its financial and performance goals and objectives in the affordable housing industry. Through strict adherence to established budgets, the preparation of solid business plans, and by creating the internal processes and procedures needed to deliver on the exceptional service commitments of the company's founder, Tim has helped fuel growth of over 87% in the last year.

Before coming to Quality, Tim was the Executive Director for the California Apartment Association – Greater Inland Empire (CAA-GIE) where he worked hand in hand with housing developers as they sought to increase and improve the supply of housing in the region. Prior to working with CAA-GIE, Tim worked for the San Bernardino County Board of Supervisors as a Deputy Chief of Staff and Acting Chief of Staff. He represents the company with the League of California Cities and has served for nine years on the San Bernardino County Housing Authority, including six years as Chairman. Tim's ability to bring together solutions in the housing, transportation, and environment sectors allows Quality to effectively navigate complicated approval and regulatory processes as projects progress.

Laura Ontiveros **Director of Operations**

As Quality Management Group's Director of Operations, Laura Ontiveros oversees property management activities for Quality's residential portfolio to ensure all properties meet or surpass industry standards. In this role, Ms. Ontiveros is responsible for the financial, regulatory, and physical management of properties under our care including reviewing and making recommendations for improvement on individual property management plans, managing the resident selection process, addressing resident concerns, and advising on the capital, budget, and marketing needs for each property. She is also responsible for reviewing plans for new developments - providing feedback on design, unit type and affordability mix, as well as overall project feasibility.

Ms. Ontiveros comes to Quality with over twenty years of property management experience across California, including USA Properties Fund, Sares Regis Group, and UDR. Her experience with conventional and affordable portfolios gives her a complete understanding of the diverse management needs in Quality's portfolio, including managing multiple high-profile capital projects, reducing employee turnover, and increasing staff engagement, managing property budgets, and developing marketing strategies to enhance property revenues.

Jacqueline Solano **Director of Compliance**

As the Director of Compliance, Jacqueline Solano is responsible for maintaining compliance with the myriad state and federal regulations that govern the various housing and funding programs for the properties under Quality's management. Ms. Solano ensures that Quality's multifamily projects are in strict compliance with the constantly shifting rules and regulations of the US Housing and Urban Development Department (HUD), the California Tax Credit Allocation Committee (TCAC), HOME, the Rental Housing Compliance Program (RHCP), and the Multi-Family Housing Program (MHP).

Ms. Solano's strong skills and background in the industry provides her with a broad base of knowledge surrounding Bond, HOME, Low Income Housing Tax Credit, Rural Development, and Project Based Section 8 Housing programs. She has 18 years of experience in housing compliance program administration having worked for Urban Futures, US Residential Group, FPI Management Inc, CIC Management, and Fairfield Residential. Additionally, Ms. Solano has secured approval for numerous Affirmative Fair Housing Marketing Plans from HUD and has unique experience with HCCP tax credit designations.



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