

PREPARED FOR:

The City of Palm Desert

Request for Proposal NO. 2024-RFP-142

Affordable Housing Compliance and Property Management Services



November 20, 2024



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Letter of Interest

November 20, 2024

Joe Barron
Senior Contracts and Grants Analyst
City of Palm Desert
73510 Fred Waring Drive
Palm Desert, CA 92260

Subject: RFP NO. 2024-RFP-142 - Affordable Housing Compliance and Property Management Services

I am writing to express National Community Renaissance's keen interest in responding to the Request for Proposal (RFP) for Affordable Housing Compliance and Property Management Services. With our extensive qualifications and proven track record, we believe that National CORE is well-equipped to meet and exceed the expectations outlined in the RFP.

National CORE stands as one of the nation's largest nonprofit developers and managers of affordable rental housing. Recognized as a "best in class" provider of property management services, we offer a comprehensive range of in-house capabilities tailored to effectively manage the complexities inherent in affordable multifamily housing. We firmly believe that where you live matters, and at National CORE, we prioritize both people and place.


Our commitment to excellence is evidenced by our management of over 13,000 affordable and market-rate rental units across 100 developments nationwide, in collaboration with private and public entities. With more than 30 years of industry experience, we have honed a fully integrated approach that encompasses expertise in human resources, finance, asset management, compliance, risk management, energy and sustainability, relocation and capital improvements.

At National CORE, we understand that high-quality management and a long-term focus are instrumental in preserving the integrity of our communities and fostering environments where residents can take pride in calling home. We are dedicated to delivering exceptional service that aligns with the unique needs of each property and its residents, ensuring a positive and sustainable living experience for all.

Considering our commitment to excellence and our proven ability to deliver results, we are confident that National CORE is well-positioned to fulfill the requirements outlined in the RFP. We look forward to the opportunity to collaborate with the City of Palm Desert and contribute to the success of your property management initiatives.

Thank you for considering National CORE for this partnership opportunity. Should you require any further information or clarification, please do not hesitate to contact me at (909) 204-3451 or mruane@nationalcore.org

Sincerely,



Michael Ruane
President
National Community Renaissance



Organizational and Personnel Background



Organizational and Personnel Background

National Community Renaissance (National CORE) is a prominent nonprofit organization committed to developing, acquiring, and managing affordable housing properties. With a mission centered around transforming lives and communities through high-quality affordable housing, National CORE has established itself as a leader in the field, driven by a passion for social impact and sustainable community development.

QUALIFICATIONS:

1. **Extensive Experience:** National CORE draws from decades of hands-on experience in developing, acquiring, and managing affordable housing properties. This extensive background equips the organization with invaluable insights and expertise, enabling it to navigate the intricate landscape of affordable housing development effectively.
2. **Proven Track Record:** National CORE's track record speaks volumes about its proficiency and efficacy in delivering tangible results. With more than 13,000 units developed and managed across various states, the organization has demonstrated its ability to transform communities, uplift residents, and catalyze positive change on a significant scale.
3. **Collaborative Partnerships:** National CORE recognizes the pivotal role of partnerships in driving meaningful impact. By forging strategic alliances with government agencies, financial institutions, philanthropic entities, and community stakeholders, the organization amplifies its reach, resources, and capabilities, fostering a collaborative ecosystem conducive to sustainable community development.
4. **Financial Stability:** National CORE's financial stability forms a cornerstone of its operational prowess. Equipped with a robust financial foundation and access to diverse funding sources, including public subsidies, tax credits, grants, and private investments, the organization possesses the agility and resources necessary to embark on ambitious projects and surmount financial challenges effectively.
5. **Commitment to Innovation:** National CORE remains at the vanguard of innovation, continuously exploring and implementing cutting-edge approaches, technologies, and best practices to enhance the affordability, sustainability, and livability of its housing developments. By embracing innovation, the organization drives efficiency, optimizes resource utilization, and delivers superior outcomes for residents and communities.
6. **Regulatory Compliance:** National CORE upholds the highest standards of regulatory compliance, ensuring adherence to all applicable laws, regulations, codes, and industry standards governing affordable housing development. By prioritizing compliance, the organization safeguards the rights, safety, and well-being of residents while maintaining the integrity and credibility of its operations.
7. **Award-Winning Portfolio:** National CORE's portfolio stands as a testament to its unwavering commitment to excellence. With numerous awards and accolades garnered for its outstanding achievements in design, construction,

sustainability, and community impact, the organization's projects exemplify innovation, quality, and social responsibility, setting a benchmark for industry peers.

MAJOR ORGANIZATIONAL STRENGTHS:

1. **Mission-Driven Culture:** At the heart of National CORE lies a mission-driven culture that inspires and empowers its team members to effect positive change. Fueled by a shared commitment to the organization's overarching mission of transforming lives and communities through affordable housing, employees channel their passion, dedication, and expertise towards realizing this noble vision.
2. **Expertise in Affordable Housing:** National CORE's multidisciplinary team comprises seasoned professionals with specialized expertise in every facet of affordable housing development, from site selection and financial structuring to design, construction, property management, and resident services. This collective knowledge and proficiency empower the organization to execute projects with precision, efficiency, and excellence.
3. **Community Engagement:** National CORE recognizes the intrinsic value of community engagement as a catalyst for inclusive, sustainable development. By actively engaging with local residents, community leaders, advocacy groups, and other stakeholders, the organization fosters meaningful dialogue, builds trust, and solicits valuable insights to inform its decision-making processes and ensure alignment with community needs and aspirations.
4. **Sustainable Practices:** Sustainability lies at the core of National CORE's ethos, permeating every aspect of its operations. From incorporating energy-efficient design features and sustainable building materials to implementing renewable energy solutions and green infrastructure, the organization prioritizes environmental stewardship, resource conservation, and long-term sustainability in its housing developments, thereby minimizing ecological footprint and operating costs while enhancing resident comfort and well-being.
5. **Commitment to Social Equity:** National CORE remains steadfast in its commitment to advancing social equity and fostering inclusive communities where individuals of all backgrounds and circumstances have access to safe, affordable housing and opportunities for upward mobility. By proactively addressing issues of housing inequality, economic disparity, and systemic injustice, the organization seeks to create a more just, equitable society where every individual can thrive and fulfill their potential.
6. **Transparent Governance:** National CORE upholds principles of transparency, accountability, and ethical governance across all facets of its operations. Through robust governance structures, policies, and practices, the organization ensures integrity, fairness, and compliance with legal and ethical standards, fostering trust and confidence among stakeholders and safeguarding the interests of residents, investors, and partners alike.
7. **Capacity for Growth:** National CORE's expansive capacity for growth positions it as a dynamic force for positive change in the affordable housing landscape. Armed with a diverse portfolio of projects, a skilled workforce, and a proven track

record of success, the organization possesses the agility, resources, and strategic foresight to pursue ambitious growth initiatives, expand its footprint, and amplify its impact on communities nationwide.

In essence, National Community Renaissance (National CORE) stands as a paragon of excellence and innovation in the affordable housing sector, driven by a steadfast commitment to social impact, sustainability, and community empowerment. With its unparalleled qualifications, major organizational strengths, and unwavering dedication to its mission, National CORE continues to redefine the boundaries of possibility, transforming lives and communities for the better, one affordable housing development at a time.

INTEGRATED TEAM OF PROFESSIONALS

ACCOUNTING

Our Accounting Team watches over the financial solvency of our properties in order to maximize income, minimize bad debt, and maximize cash distribution to owners.

- Financial and operations auditing
- Financial reporting
- Cost containment analyses
- Strategic planning and benchmarking
- Yardi Voyager, web-based property management software and asset management solutions

ASSET MANAGEMENT

Comprehensive asset management planning, financial reviews, onsite physical and staff evaluations, debt restructuring/re-syndication, review of agency requirements and documentation plus constant communication.

- Responsible for the preservation of the physical assets
- Submit monthly, quarterly, semi-annual and annual reports
- Supervise disbursements
- Develop property watch list for under-performing properties

CAPITAL IMPROVEMENTS

Preserves the integrity of the physical platform while introducing modern touches to keep the property current and efficient.

- Interior and exterior maintenance
- Skilled maintenance staff
- Cost containment analyses
- HandyTrac Key Management System
- Focus on leasing units with minimal turn time, maximizing economic occupancy

COMPLIANCE

Maintains a service-oriented approach designed to assist owners and agents in complying with the many complex federal and state housing regulations.

- Full regulatory compliance
- Compliance certification and recertification
- Measure and evaluate site level staff
- Monitor file turnaround times
- Identify training opportunities
- Custom compliance property checklist based on the funding sources and specific compliance requirements
- Compliance monitoring audits

ENERGY AND SUSTAINABILITY

“Doing Our Part” to develop sustainable communities and implement conservation programs that maintain the health and stability of our communities.

- Turf removal and smart irrigation
- Installation of high efficiency toilets, shower heads and flow restrictors
- Installation of high efficiency front load washers
- Installation of demand control devices
- Installation of Wi-Fi controlled thermostats
- LED lighting upgrades
- Utility data tracking with WegoWise

HUMAN RESOURCES

We offer a full service HR team to provide employee relations and operational support.

- Recruitment, hiring and retention
- Compensation and benefits
- Payroll and HR systems
- Employee relations
- Performance management
- Training and development
- Safety management

PROPERTY MANAGEMENT

Experts in resident service programs, facilities management, maintenance, leasing, and compliance with affordable housing regulations allows owners and agents to place their trust in our services and achieve the highest level of resident satisfaction.

- Planning and budgeting
- Market evaluation
- Advertising, marketing and lease-up
- Resident screening
- Lease renewal negotiations
- Rent and maintenance collection
- Supervision of personnel
- Owner/resident relations
- Residential relocation

RISK MANAGEMENT

Identifies, assesses and controls threats to capital and earnings.

- Oversees contract negotiations
- Conducts vendor and contract screenings
- Mitigates safety and environmental issues
- Annual property inspections



Experience

Experience



National CORE is one of the nation's largest nonprofit developers and managers of affordable rental housing. As a "best in class" provider of property management services, National CORE offers an array of in-house capabilities to navigate the complexities of managing affordable multifamily housing.

BECAUSE WHERE YOU LIVE MATTERS

At National CORE, we believe that people and place matter. High-quality management and a long-term focus are keys to preserving the integrity of our communities and creating a place residents are proud to call home.

Here's a deeper exploration of our key strategies and strengths:

1. **Resident-Centric Approach:** National CORE's dedicated staff is deeply committed to exceeding the needs of residents. They prioritize tenant satisfaction by offering responsive maintenance services, organizing community events, and providing resources to support residents' well-being. By fostering a sense of community and actively listening to residents' concerns, they create a positive living environment for all.
2. **Performance Optimization:** National CORE is committed to maximizing rents and overall property performance. Through monthly operational reviews, they closely monitor financial metrics, occupancy rates, and maintenance costs to identify areas for improvement and implement strategic adjustments. This proactive approach ensures that properties operate at their fullest potential while maintaining affordability for residents.
3. **Stakeholder Engagement:** Regular communication with all stakeholders, including residents, local governments, investors, and community organizations, is a cornerstone of National CORE's property management strategy. By fostering transparent and open dialogue, they build trust and collaboration, enabling effective problem-solving and alignment of goals.
4. **Legal Compliance Expertise:** National CORE's team comprises experts in landlord/tenant laws and fair housing regulations. They stay abreast of the latest legal developments and ensure strict adherence to all relevant regulations, minimizing legal risks and protecting the rights of both tenants and property owners.

5. **Owner's Perspective:** With ownership of over 100 properties, National CORE understands the intricacies of property management from an owner's perspective. They prioritize long-term asset preservation and value enhancement, employing sound financial management practices and strategic decision-making to optimize returns on investment.
6. **Innovative Solutions:** National CORE continuously seeks innovative solutions to enhance property management efficiency and effectiveness. Whether through the implementation of advanced technology systems, sustainable practices, or community development initiatives, they remain at the forefront of industry best practices to deliver exceptional results.
7. **Commitment to Continuous Improvement:** National CORE's commitment to excellence extends to ongoing learning and improvement. They invest in staff training and development, leverage feedback mechanisms, and conduct regular performance evaluations to identify areas for enhancement and ensure continuous growth and success.

EXPERIENCE WITH SERVING AS A PROVIDER OF PROPERTY MANAGEMENT SERVICES

National Community Renaissance stands as a beacon of excellence in the realm of property management, a trusted steward for esteemed entities like Ethos, Invesco, City of Rosemead, LINC Housing, Episcopal Communities & Services and our newest partnership with The Housing Authority of the City of Los Angeles (HACLA). With unwavering dedication and a commitment to excellence, National CORE manages a diverse portfolio comprising 596 market-rate units across five premier properties nestled in the picturesque San Fernando Valley, CA, as well as 136 units for the Episcopal Communities & Services in the vibrant locale of Redondo Beach, CA, 200 units for the City of Rosemead, 1,100 units for LINC Housing and an upcoming 835 units for HACLA.

National CORE's partnership with Ethos, Invesco, City of Rosemead, LINC Housing, the Episcopal Communities & Service, and HACLA underscores its reputation as a trusted ally in the realm of property management. By leveraging its expertise and innovative approach, National CORE consistently delivers exceptional results, maximizing property value and enhancing the overall community experience.

In every interaction and endeavor, National CORE embodies professionalism, integrity, and a genuine passion for creating spaces where individuals and families can flourish. Through its unwavering commitment to excellence, National CORE sets the gold standard for third-party property management, earning the admiration and trust of clients and residents alike.

The specific individual assigned to work with the City of Palm Desert from National Community Renaissance (National CORE) would be Courtney Richard, Senior Vice President of Property Management.

Courtney Richard has been an integral part of the National CORE team since 2012, bringing with her extensive experience in property management dating back to 2009. In her role, Courtney oversees the operations and management of National CORE's extensive portfolio of 100+ affordable housing communities



and leads a team of more than 350 professionals. Courtney's responsibilities include setting strategic goals for National CORE's largest division to address the evolving needs of the organization's expanding portfolio and new business ventures. Notably, in 2012, Courtney played a pivotal role in establishing in-house relocation services, a move that has proven to be highly successful for

National CORE, generating additional revenue streams through third-party services while ensuring minimal resident hardship and compliance with regulatory requirements.

Recognized for her outstanding contributions, Courtney has received accolades from industry organizations such as the Southern California Association on Nonprofit Housing (SCANPH) and Affordable Housing Finance. She holds several certifications, including RAD Project-Based Voucher, Rental Assistance Certification, and Tax Credit Specialist. Courtney earned her Bachelor of Science in Business Administration from Cal State San Bernardino.

To maximize net income at the properties it manages, National CORE's Senior VP of Property Management conducts:

- Detailed budget development and review processes
- Monthly financial reviews with regional managers
- Quarterly in-depth reviews with CFO, controller, asset managers, and regional managers
- Ongoing monitoring and analysis by financial analyst to maximize property performance

As the Senior Vice President of Property Management, Courtney Richard would be the key liaison between National CORE and the City of Palm Desert, leveraging her expertise and leadership to ensure successful collaboration and the fulfillment of shared objectives.

OTHER KEY STAFF MEMBERS:

In addition to Courtney Richard, the Senior Vice President of Property Management, several other individuals from National Community Renaissance (National CORE) would be involved on the property management level in collaboration with the City of Palm Desert. These individuals play critical roles in ensuring the effective management and operation of National CORE's affordable housing communities. They include:

1. **VP of Maintenance and Capital Improvements:** Responsible for overseeing maintenance operations and capital improvement projects across National CORE's properties, ensuring that they are well-maintained and meet quality standards.

2. **Director of Capital Improvements:** Leads the planning and execution of capital improvement projects, working closely with property managers and maintenance teams to enhance the quality and value of National CORE's properties.

3. **Director of Operations:** Manages day-to-day operational activities at National CORE's properties, including leasing, resident services, and regulatory compliance, to ensure efficient and effective property management.

4. **Director of PM Financials:** Handles financial matters related to property management, including budgeting, financial reporting, and analysis, to ensure fiscal responsibility and accountability.

5. **Director of Relocation:** Oversees relocation services, ensuring smooth transitions for residents affected by redevelopment or renovation projects while complying with regulatory requirements and minimizing disruptions.

6. **Regional Lease-up Manager:** Coordinates leasing activities and manages occupancy levels across National CORE's properties, implementing strategies to maximize rental income and minimize vacancies.

7. **Property Management Project Managers:** These professionals are responsible for overseeing specific projects or initiatives within the property management division, ensuring timely completion and successful implementation.

These individuals, along with Courtney Richard, form a cohesive team dedicated to delivering high-quality property management services in alignment with the goals and objectives of National CORE and the City of Pam Desert. Their collective expertise and leadership contribute to the success and sustainability of affordable housing communities in the region.

TIME REQUIRED TO BEGIN PROPERTY MANAGEMENT:

National Community Renaissance (National CORE) stands ready to commence property management services with unparalleled efficiency and dedication. Our team understands the urgency of meeting the needs of our clients and their communities, and we are fully equipped to start as early as required. Whether it's ensuring seamless transitions for newly acquired properties or swiftly addressing management needs for existing ones, National CORE is committed to providing prompt and comprehensive solutions.

With a well-established infrastructure and a team of seasoned professionals, we have the capacity to mobilize quickly and initiate property management services without delay. Our extensive experience in the affordable housing sector, coupled with our proven track record of excellence, enables us to hit the ground running and deliver results from day one.

Furthermore, our commitment to client satisfaction and proactive communication means that we will work closely with stakeholders to understand their unique needs and priorities, ensuring a smooth and efficient transition to our property management services. Our goal is not just to meet expectations but to exceed them, providing exceptional service and support every step of the way.



Price



Joe Barron
Sr. Contracts and Grants Analyst
City of Palm Desert
73510 Fred Waring Drive, Palm Desert, CA 92260

Dear City of Palm Desert,

Subject: Proposal for Affordable Housing Compliance and Property Management Services

We at National Community Renaissance are delighted to submit this proposal for property management services to the City of Palm Desert.

Our proposal encompasses a comprehensive suite of services aimed at enhancing the quality of life for residents while ensuring the efficient operation and maintenance of your properties. With our proven track record and commitment to excellence, we are confident that our partnership will achieve your objectives and exceed your expectations.

Management Fee:

We propose a management fee of \$70.00 per door (unit) per month, as outlined in the RFP packet. This fee reflects the value we provide through our extensive range of services, including but not limited to:

1. Property Maintenance:

- Routine inspections and maintenance checks to ensure properties are well-maintained and in compliance with all regulations.
- Prompt response to maintenance requests and emergencies to address issues swiftly and efficiently.
- Coordination of repairs and renovations to enhance property value and resident satisfaction.

2. Tenant Relations:

- Proactive communication with tenants to foster positive relationships and address concerns promptly.
- Implementation of community engagement initiatives to promote a sense of belonging and wellbeing among residents.



- Fair and consistent enforcement of lease agreements and community rules to maintain a harmonious living environment.

3. Financial Management:

- Collection of rents and other fees in a timely manner to ensure consistent cash flow.
- Comprehensive financial reporting and budgeting to provide transparency and accountability.
- Strategic financial planning to optimize property performance and maximize returns on investment.

4. Compliance and Legal Support:

- Ensuring properties adhere to all local, state, and federal regulations, including Fair Housing laws and ADA requirements.
- Providing legal support and representation in matters related to evictions, lease agreements, and disputes.

5. Technology Integration:

- Implementation of cutting-edge property management software to streamline operations and enhance efficiency.
- Utilization of digital communication tools to facilitate seamless interaction with residents and stakeholders.

We are committed to tailoring our services to meet the unique needs and goals of the City of Palm Desert, and we welcome the opportunity to discuss any specific requirements or preferences you may have. Thank you for considering National Community Renaissance for your property management needs. We are eager to contribute to the success of your housing initiatives and look forward to the possibility of partnering with you.

Sincerely,



Courtney Richard
Senior Vice President
National Community Renaissance



Affirmative Action

Affirmative Action

National Community Renaissance (National CORE) embraces and upholds the principles of equal opportunity and nondiscriminatory employment practices. As a responsible and ethical organization, we are committed to creating a workplace culture that fosters diversity, equity, and inclusion at every level.

Our commitment to equal opportunity extends to all aspects of employment, including recruitment, hiring, training, promotion, compensation, and termination. We adhere strictly to all government regulations and legal requirements pertaining to nondiscriminatory employment practices, ensuring that every individual has an equal opportunity to thrive and succeed within our organization, regardless of their race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, or any other protected status.

National CORE believes that a diverse and inclusive workforce not only strengthens our organization but also enhances our ability to serve our residents and communities effectively. We actively seek to attract and retain talented individuals from diverse backgrounds, perspectives, and experiences, recognizing that diversity drives innovation, fosters creativity, and enriches our collective understanding.

Our commitment to equal opportunity is reflected in our policies, practices, and procedures, as well as in the training and education provided to our employees. We continuously monitor and evaluate our recruitment and employment practices to identify and address any barriers to equal opportunity and diversity, ensuring that our workplace remains fair, inclusive, and welcoming to all.

National Community Renaissance complies fully with all government regulations regarding nondiscriminatory employment practices and is dedicated to fostering a workplace environment where every individual is respected, valued, and empowered to reach their full potential. We are proud to be an Equal Opportunity Employer and remain steadfast in our commitment to diversity, equity, and inclusion in all aspects of our operations.



[Additional Information](#)

Additional Information

MANAGEMENT SPECIALITY

National Community Renaissance (National CORE) has extensive experience working with Low Income Housing Tax Credits (LIHTC), Home programs, Section 8 Housing Choice Vouchers (HCV), and tax-exempt bond financed properties. Here's a breakdown of our experience with each:

1. Low Income Housing Tax Credits (LIHTC)

National CORE has a strong track record of developing and managing affordable housing projects utilizing Low Income Housing Tax Credits. LIHTC is a crucial tool in financing affordable housing developments, and our team has in-depth knowledge and expertise in navigating the complexities of LIHTC projects. We have successfully leveraged LIHTC to create high-quality affordable housing communities that meet the needs of low-income individuals and families.

2. Home Programs

National CORE has participated in Home programs aimed at expanding access to affordable housing for low-income households. These programs provide funding for a variety of affordable housing activities, including the construction, acquisition, and rehabilitation of affordable housing units. Our experience with Home programs includes developing and managing projects that utilize Home funds to provide safe, decent, and affordable housing options for individuals and families in need.

3. Section 8 Housing Choice Vouchers (HCV)

National CORE has significant experience working with Section 8 Housing Choice Vouchers, which provide rental assistance to eligible low-income individuals and families. We understand the regulations and requirements associated with the Section 8 program and have successfully partnered with local housing authorities to administer Section 8 vouchers at our affordable housing properties. Our goal is to ensure that residents have access to quality housing while receiving the support they need to maintain stable and sustainable housing situations.

4. Tax-Exempt Bond Financed Properties

National CORE has developed and managed properties financed through tax-exempt bonds, which are often used to finance affordable housing projects. We have a thorough understanding of the complexities involved in structuring and financing tax-exempt bond transactions and have successfully utilized this financing mechanism to create affordable housing opportunities in communities across the country. Our experience with tax-exempt bond financing allows us to leverage available resources effectively and maximize the impact of our affordable housing developments.

National Community Renaissance's experience with Low Income Housing Tax Credits, Home programs, Section 8 Housing Choice Vouchers, and tax-exempt bond financed properties demonstrates our commitment to creating and preserving affordable housing opportunities for individuals and families in need. We have a proven track record of success in developing and managing affordable housing projects that make a meaningful difference in the lives of residents and communities we serve.

PERSONNEL AND OWNERSHIP

A. National Community Renaissance (National CORE) prioritizes recruiting, hiring, training, developing, and retaining skilled staff as a cornerstone of our organization's success. Our approach encompasses several key principles:

1. Recruiting

- We actively seek out diverse talent pools to ensure that our workforce reflects the communities we serve.
- National CORE employs various recruitment strategies, including job postings, career fairs, networking events, and partnerships with educational institutions and community organizations.
- We focus on attracting individuals who are passionate about our mission of creating and managing affordable housing and who embody our core values of integrity, excellence, and compassion.

2. Hiring

- Our hiring process is thorough and transparent, ensuring that candidates are assessed based on their skills, experience, and alignment with our organizational culture.
- We strive to create an inclusive and welcoming environment for all applicants and prioritize diversity, equity, and inclusion throughout the hiring process.
- National CORE is committed to fair and equitable hiring practices that promote equal opportunity and access to employment for all individuals.

3. Training and Development

- National CORE invests in comprehensive training and development programs to equip employees with the knowledge, skills, and tools they need to excel in their roles.
- We provide both on-the-job training and formal training opportunities tailored to the specific needs and career aspirations of our staff members.
- Our training programs cover a range of topics, including property management, customer service, compliance, leadership development, and technical skills development.
- We encourage continuous learning and professional growth through workshops, seminars, online courses, mentorship programs, and tuition reimbursement initiatives.

4. Retention

- National CORE is committed to creating a supportive and inclusive work environment where employees feel valued, respected, and empowered to contribute to our mission.
- We prioritize employee engagement, recognition, and feedback, fostering a culture of appreciation and collaboration.
- Our organization offers competitive compensation and benefits packages, including health and wellness programs, retirement plans, and opportunities for career advancement.
- We recognize the importance of work-life balance and offer flexible work arrangements and employee assistance programs to support the well-being of our staff members.

5. Performance Management

- National CORE implements performance management systems to set clear expectations, provide regular feedback, and recognize and reward high performance.
- We encourage open communication and dialogue between employees and supervisors to address challenges, identify growth opportunities, and support career development aspirations.
- Our performance management processes are designed to promote accountability, transparency, and continuous improvement across all levels of the organization.

We believe that investing in our workforce is essential to achieving our mission of creating and managing affordable housing that enhances the quality of life for individuals and families in our communities.

B. National Community Renaissance (National CORE) is deeply committed to promoting equal opportunity and fostering diversity, equity, and inclusion in all aspects of our operations, including employment, contracting, purchasing, and beyond. Our policies and procedures reflect this commitment and are designed to ensure fairness, transparency, and non-discrimination in all interactions with employees, contractors, vendors, and partners.

1. Equal Opportunity in Employment

- National CORE strictly prohibits discrimination in employment on the basis of race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or any other characteristic protected by applicable laws and regulations.
- We adhere to all federal, state, and local laws governing equal employment opportunity and affirmative action, including Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act (ADA), and the Age Discrimination in Employment Act (ADEA).
- Our recruitment, hiring, promotion, compensation, and other employment-related practices are conducted without regard to protected characteristics, and all employment decisions are based solely on merit, qualifications, and job-related criteria.

2. Contracting and Purchasing

- National CORE promotes fair and open competition in contracting and purchasing processes and seeks to provide equal opportunities for businesses of all sizes, including minority-owned, women-owned, veteran-owned, and small businesses.
- We actively seek out diverse suppliers and contractors and encourage their participation in our procurement processes through outreach efforts, supplier diversity programs, and partnerships with diverse business organizations.

- Our procurement procedures prioritize the selection of vendors and contractors based on their qualifications, capabilities, and value proposition, rather than factors unrelated to the quality of goods or services provided.
- National CORE is committed to fostering strong, collaborative relationships with our suppliers and contractors, based on mutual respect, integrity, and accountability.

3. Training and Awareness

- National CORE provides training and education to employees, contractors, and vendors on equal opportunity principles, non-discrimination policies, and best practices for promoting diversity and inclusion in the workplace.
- We encourage open dialogue and communication regarding equal opportunity issues and strive to create a culture of respect, understanding, and acceptance among all members of the National CORE community.
- Our organization regularly reviews and updates our policies and procedures to ensure compliance with applicable laws and regulations and to address emerging issues and best practices related to equal opportunity and diversity.

4. Compliance and Accountability

- National CORE maintains robust systems for monitoring, evaluating, and enforcing compliance with equal opportunity policies and procedures.
- We investigate and address complaints of discrimination, harassment, or other violations of equal opportunity principles promptly and impartially, taking appropriate corrective action as necessary.
- Our commitment to equal opportunity is integral to our organizational values and is reflected in our leadership's unwavering dedication to upholding the highest standards of integrity, fairness, and ethical conduct.

We are committed to creating a culture of inclusivity where all individuals are treated with dignity, respect, and fairness, and where everyone has the opportunity to thrive and succeed.

LEADERSHIP

**MICHAEL M. RUANE**

President

Michael M. Ruane, National CORE's President, leads the development of program and business strategies for the organization and is responsible for overseeing all operating departments. Previously, Mr. Ruane served in a variety of leadership positions in Orange County, including Chief of Strategy and Public Affairs

of CalOptima, Executive Director of the Children and Families Commission, Assistant County Chief Executive Officer and Director of the Environmental Management Agency. Mr. Ruane is a graduate of the University of California, Irvine, and earned a master's degree from the UCLA Graduate School of Architecture and Urban Planning. Mr. Ruane is the Immediate Past Chair of the Orange County/Inland Empire District Council of the Urban Land Institute and is the Jury Chair for the 2016 HUD Innovation in Affordable Housing national design and planning competition.

**ROBERT DIAZ**

Executive Vice President & General Counsel

Robert Diaz is National CORE's Executive Vice President and General Counsel. Robert drives organizational growth and works to develop National CORE's infrastructure to maximize our team's effectiveness and efficiency in pursuit of our mission.

Robert joined National CORE in 2017 as its General Counsel and previously served as Chief Administrative Officer before assuming his current responsibilities. Prior to joining National CORE, Robert served in various capacities as an attorney in the areas of debt finance, corporate governance, banking regulations, mergers and acquisitions and general corporate law. Robert has also focused on the development and implementation of corporate controls and structure and has significant experience in large-scale regulatory remediation efforts in the financial industry.

Robert graduated from the University of Chicago Law School and received his B.S. degree in Business Administration from Chapman University. He was commissioned as an officer in the United States Army Reserve and served as a member of the Army's JAG Corps for 15 years.

EXECUTIVE TEAM

**DORETTA "DORRIE" BRYAN**

Senior Vice President Of Operations

Dorrie Bryan began her career with National CORE in 1995 as the Executive Assistant to our Founder and CEO. After graduating from the University of California Riverside Human Resources Certificate Program in 1999, Dorrie was promoted to Vice President of Human Resources and Operations.

In her current role, she is responsible for planning, developing, implementing, administering, and budgeting for all areas of employment, compensation, benefits, training, employee relations, legal compliance, affirmative action, and health and safety programs, for National CORE's 400+ employees. Other professional affiliations include Professionals in Human Resources Association and the Society of Human Resources Management.

**ALYSSA COTTER**

Vice President, Hope Through Housing Foundation

Alyssa Cotter is a fundraising professional with more than 15 years of experience in nonprofit, higher education and local government settings. As Vice President for the Hope through Housing Foundation, she oversees the day-to-day operations and strategic focus of

the Foundation. In her five years with Hope through Housing, Alyssa has been instrumental in building strategic partnerships and strong financial support from the community through numerous initiatives, including the creation of the Women of Hope affinity group, the launch of the Building Bright Futures Scholarship program for high-school graduates and adult learners as well as successfully raising more than \$5 million to support resident programs in California, Texas and Florida. Previously, she coordinated individual giving, corporate/private foundation relations and large-scale special events. Before joining Hope through Housing, Alyssa served as director of development at the Inland Empire United Way and as director of constituent and scholarship programs for the UCR Alumni Association.

Alyssa earned her bachelor's degree in business management and master's degree in public administration from California State University, San Bernardino. Alyssa serves as incoming chair of the Board of Directors for the Association of Fundraising Professionals, Inland Empire Chapter.



MICHAEL FINN

Chief Financial Officer

Michael Finn is National CORE's Chief Financial Officer. As CFO, Michael is responsible for the overall financial strategy and fiscal practices of the organization. He oversees corporate, real estate development, construction, and property management accounting, strategic financial planning and analysis, IT, risk

management and vendor relations. Has the overall responsibility to steward the organizations \$1.2B in real estate assets and works closely with the Board of Directors Audit and Finance committees.

Before joining National CORE, he served as CFO for a major healthcare technology company and brings more than 25 years of management experience in finance and accounting. He has significant experience in the technology, healthcare, real estate, construction, manufacturing, and entertainment fields. He received his bachelor's degree in economics from UCLA.



CHRIS KILLIAN

Senior Vice President Of Construction

Chris Killian, Senior Vice President of Construction, began his career at National CORE in 2004 as an onsite Construction Superintendent and has held various positions within the organization, including Construction Manager and Vice President of Estimating. During his tenure with National CORE, he has been

responsible for the construction and renovation of more than 1,240 apartment units, valued at approximately 215 million dollars. Prior to joining National CORE, Chris spent five years with the Fontana Unified School District, where as a Project Manager he was involved in the construction of four new schools with a total value of 103 million dollars. He also was responsible for the coordination of infrastructure and installation of numerous modular facilities during his time with the school district. Chris has a BS from the University of Redlands, and has taken course work in construction and supervision from Riverside Community College. He is a licensed General Contractor(B) in the State of California.



COURTNEY RICHARD

Senior Vice President Of Property Management

Courtney Richard, Senior Vice President of Property Management, has been a member of the National CORE team since 2012 and has worked in property management since 2009. In her role, she oversees the operations and management of National CORE's 100+ affordable

housing communities and a team of more than 300. She is responsible for setting strategic goals for National CORE's largest division to meet the growing needs of National CORE's expanding portfolio and new business lines.

In 2012, Courtney was instrumental in bringing relocation services in-house. Under her leadership, the team has launched a lucrative business line for National CORE, offering third-party services. Her unique approach to relocation minimizes resident hardship and provides consistent communication with residents while complying with mandated regulations.

Courtney has been recognized for her accomplishments by the Southern California Association on Nonprofit Housing (SCANPH) and Affordable Housing Finance. She holds multiple certifications, including RAD Project-Based Voucher, Rental Assistance Certification and Tax Credit Specialist. She graduated from Cal State San Bernardino with a Bachelor of Science in Business Administration.



JILL VAN BALEN

Senior Vice President Of Marketing And Communications

Jill Van Balen began her career with National CORE and Hope through Housing in 2001 as the Executive Assistant for the Founder and CEO. Since then, Jill has held several positions within the organization, including Marketing and Fund Development Manager, Manager of

Corporate Affairs and Grant Writer. In her current capacity, she is responsible for all corporate and business group branding, marketing and public relations to promote, enhance and grow the brands of National CORE and Hope through Housing.

Active in her community, Jill is the Past President of the Board of Directors for the Association of Fundraising Professionals Inland Empire Chapter, she also serves on the Board of Directors for the Purple Hearts and on the Board of Directors' Fundraising Committee for OPARC. She received her Bachelor of Arts Degree in Communications/Marketing from Virginia Polytechnic Institute and State University in Blacksburg, Virginia.



ALEXA WASHBURN

Chief Development Officer

Alexa Washburn is Chief Development Officer for National CORE. As an affordable housing developer and public agency program manager, Alexa has managed, prepared and implemented a variety of community development projects over her

20 year career. Her projects have been recognized with 12 awards from the American Planning Association and Southern California Association of Governments. She applies her creative land planning, design solutions, and in-depth understanding of progressive policy and implementation strategies to effectively enhance the feasibility, livability, and sustainability of National CORE's communities. Alexa is responsible for acquisitions, forward and advanced planning, environmental, entitlements, and community outreach. She also established National CORE's consulting practice, providing consulting services to public and private sector clients.

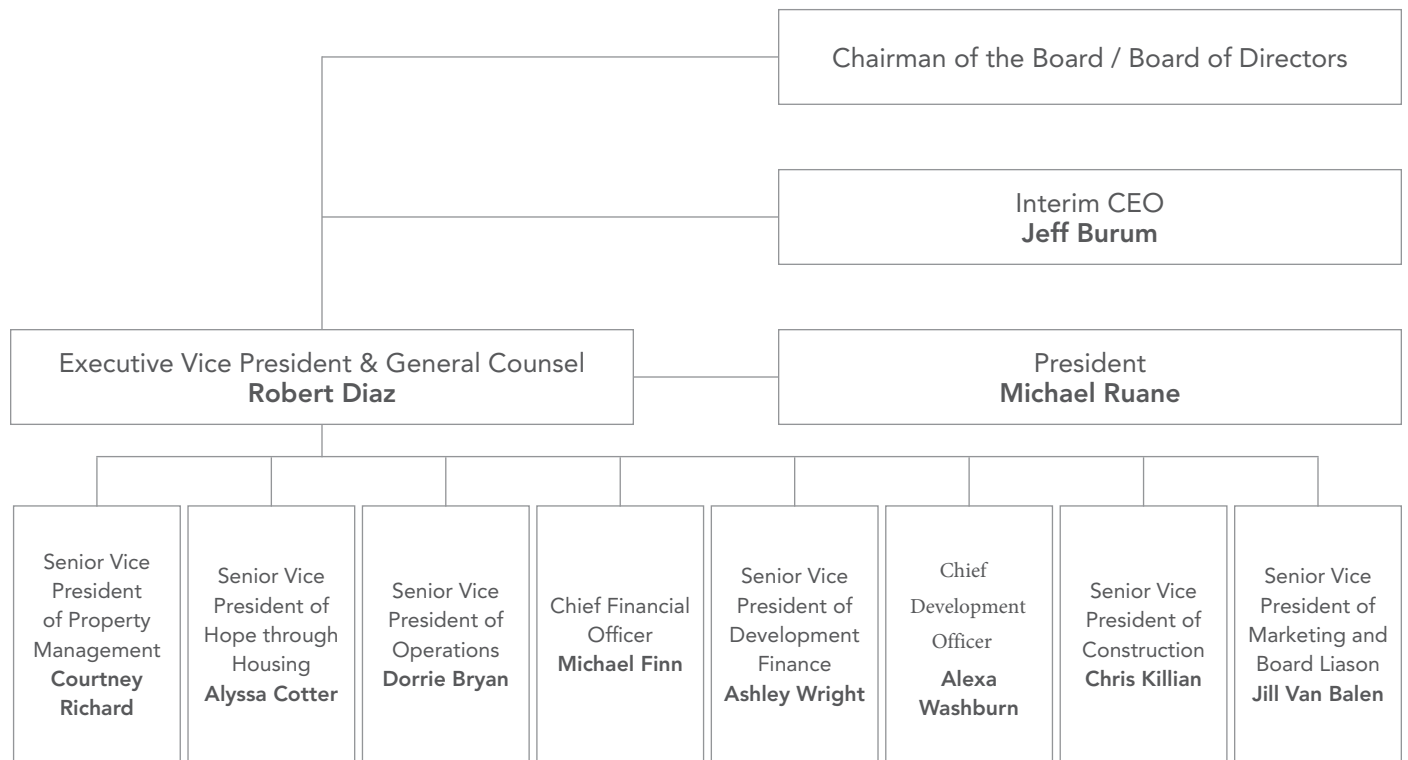
Alexa is an advanced professional in LEED Neighborhood Development (LEED AP ND), and has earned a certificate from UCLA in Affordable Housing Development, bachelor's degrees in urban planning, geography and environmental studies, and a Master's degree in public policy & administration.

ASHLEY WRIGHT

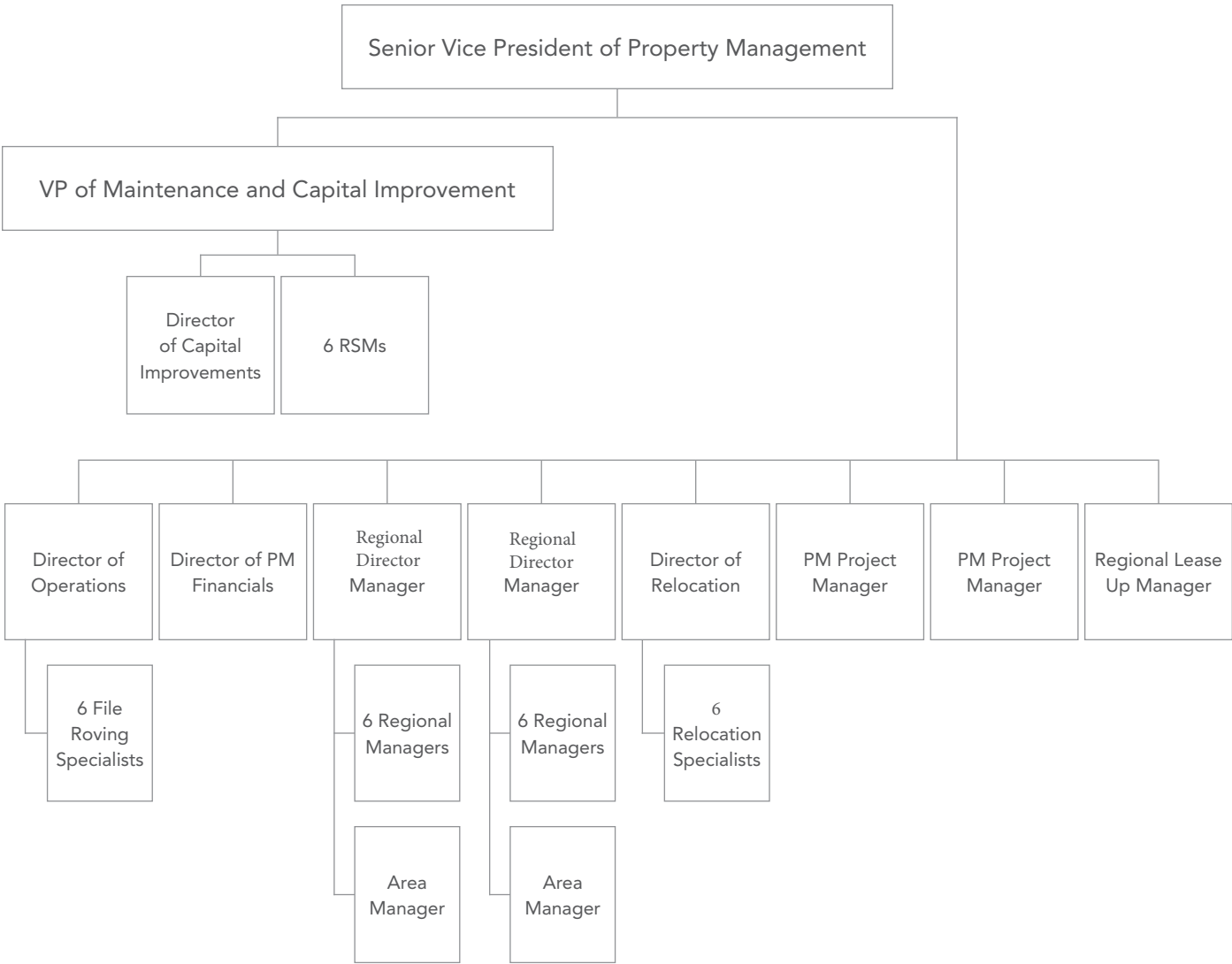
Senior Vice President Of Development

In his role as Senior Vice President, Ashley Wright oversees all development activities for the organization. He has more than 25 years of experience in real estate finance and housing development. His knowledge includes entitlement, project management, development and construction of multifamily rental housing, for sale housing and commercial. He is proficient with numerous market-rate and affordable housing financing sources such as low-income housing tax credits, various state and federal programs, tax-exempt bonds, private equity and conventional financing. Ashley graduated from the California State Polytechnic University, Pomona, with a focus in finance, real estate and law.

ORGANIZATIONAL CHART OF LEADERSHIP



ORGANIZATIONAL CHART OF PROPERTY MANAGEMENT



OPERATION POLICIES

NATIONAL COMMUNITY RENAISSANCE'S APPROACH

1. **Maintenance:** National CORE prioritizes proactive and responsive maintenance to ensure properties are well-maintained and residents' needs are promptly addressed. This includes routine inspections, timely repairs, and a focus on preventive maintenance to minimize future issues.

Example: Implementing a predictive maintenance program using data analytics and technology to anticipate equipment failures and address them before they occur, thereby reducing downtime and maintenance costs.

2. **Resident Services and Relations:** National CORE is dedicated to providing comprehensive resident services to enhance quality of life and foster a sense of community. This may include educational programs, social activities, and access to support services tailored to residents' needs. Additionally, maintaining open communication channels and addressing concerns promptly are vital for positive resident relations.

Example: Establishing partnerships with local organizations to offer job training, financial literacy workshops, and wellness programs tailored to residents' interests and needs.

3. **Marketing:** National CORE employs strategic marketing initiatives to attract and retain residents, emphasizing the unique features and benefits of each property. This may involve targeted advertising campaigns, community outreach efforts, and leveraging digital platforms to reach prospective residents.

Example: Launching a digital marketing campaign highlighting the affordability, amenities, and community atmosphere of properties to attract potential tenants from diverse backgrounds.

4. **Strategic Planning:** National CORE engages in comprehensive strategic planning to set clear goals and objectives for property management, aligning with broader organizational objectives. This involves analyzing market trends, assessing community needs, and identifying opportunities for growth and improvement.

Example: Developing a long-term strategic plan for property portfolio expansion, identifying target markets and acquisition opportunities that align with National CORE's mission and vision.

5. **Management Review:** National CORE conducts regular management reviews to evaluate performance, identify areas for improvement, and ensure alignment with organizational goals. This involves analyzing key performance indicators, soliciting feedback from stakeholders, and implementing strategies to enhance efficiency and effectiveness.

Example: Implementing a quarterly performance review process where property managers and team members discuss accomplishments, challenges, and opportunities for growth, fostering a culture of accountability and continuous improvement.

PROGRAM COMPLIANCE

National CORE prioritizes compliance with all applicable housing programs, including LIHTC (Low-Income Housing Tax Credit), HOME Investment Partnerships Program, Section 8, and tax-exempt bond regulations. This involves thorough understanding of program requirements, meticulous record-keeping, and adherence to reporting deadlines.

ROUTINE AND PREVENTIVE MAINTENANCE

National CORE emphasizes the importance of both routine and preventive maintenance to ensure properties remain in optimal condition. Routine maintenance involves regular inspections and repairs to address day-to-day issues, while preventive maintenance focuses on proactive measures to prevent major breakdowns and extend the lifespan of equipment and facilities.

PUBLIC RELATIONS AND CRISIS MANAGEMENT

National CORE recognizes the significance of public relations and crisis management in maintaining a positive public image and addressing emergencies effectively. This includes proactive communication with stakeholders, media relations strategies, and preparedness planning to mitigate risks and respond swiftly to crises.

ESSENTIAL PROJECT OPERATIONS SUGGESTIONS

- Prioritize resident satisfaction and engagement through comprehensive resident services and proactive communication.
- Invest in ongoing training and professional development for staff to ensure they have the skills and knowledge needed to excel in their roles.
- Foster strong partnerships with local organizations, government agencies, and community stakeholders to leverage resources and support community development initiatives.
- Embrace innovation and technology to streamline operations, enhance efficiency, and improve resident experiences.
- Maintain strict compliance with regulatory requirements and housing program guidelines to safeguard financial stability and uphold ethical standards.

FINANCIAL & ACCOUNTING

ACCRUAL ACCOUNTING

National Community Renaissance (National CORE) has extensive experience with accrual accounting. We generate accrual accounting statements using industry-standard accounting software such as QuickBooks, Yardi, or similar platforms. These software solutions allow for accurate recording of revenue and expenses when they are incurred, regardless of when cash transactions occur. This method provides a more comprehensive and accurate picture of financial performance over time.

CHART OF ACCOUNTS

Our team is proficient in adapting accounting statements to align with specific chart of accounts requirements, including those set forth by the City of Palm Desert. We have the capability to generate accounting statements using the City of Palm Desert's chart of accounts or any other customized chart of accounts as necessary to meet the reporting needs of our clients and regulatory authorities.

ELECTRONIC POSTING

National CORE is equipped to deliver accounting statements and reports electronically. We utilize secure online portals, email communications, and electronic document management systems to efficiently distribute accounting statements and reports to clients, stakeholders, and team members. This ensures timely delivery of financial information while reducing paper waste and administrative burden.

BUDGETING PROCEDURES:

National CORE implements robust budgeting procedures to ensure effective budget control for each site under management. Our approach involves the following steps:

- **Comprehensive Analysis:** We conduct a thorough analysis of historical financial data, market trends, and property-specific factors to establish realistic budget targets.
- **Stakeholder Involvement:** We collaborate with property owners, investors, and other stakeholders to develop budgets that align with their financial goals and objectives.
- **Expense Monitoring:** We closely monitor expenses throughout the budget period, tracking variances and identifying areas where costs can be contained or reduced.
- **Performance Reviews:** Regular performance reviews are conducted to assess budget adherence and identify opportunities for efficiency improvements.
- **Continuous Improvement:** We continuously evaluate and refine budgeting procedures to maximize efficiencies and contain costs, leveraging technology and industry best practices to optimize financial performance.

By implementing these budgeting procedures, National CORE strives to ensure that each site operates within its financial means while delivering high-quality services and maintaining the long-term sustainability of the property.

PORTFOLIO EXPERIENCE

Please see following pages.

FURTHERANCE OF NATIONAL CORE'S MISSION

MANAGEMENT OF A PROPERTY CATERING TO A CHALLENGING RESIDENT POPULATION

National Community Renaissance (National CORE) has successfully managed properties catering to challenging resident populations, including those in need of Permanent Supportive Housing (PSH).

Example: National CORE manages a property that provides PSH to individuals experiencing chronic homelessness, mental health issues, and substance abuse disorders. The challenging population presented complex needs requiring a comprehensive approach to management.

TECHNIQUES USED

1. Collaborative Partnerships: National CORE partnered with local social service agencies, healthcare providers, and community organizations to provide wraparound services such as case management, counseling, and access to healthcare.
2. On-Site Support Services: The property offered on-site supportive services, including counseling sessions, life skills workshops, and substance abuse treatment programs, tailored to the unique needs of residents.
3. Trauma-Informed Care: National CORE implemented trauma-informed care practices to create a safe and supportive environment for residents, recognizing the impact of past trauma on behavior and well-being.
4. Resident Engagement: The property facilitated resident engagement through regular community meetings, resident councils, and social activities, empowering residents to take ownership of their living environment and fostering a sense of belonging.
5. Staff Training: National CORE provided specialized training to property management staff on managing challenging populations, including conflict resolution, de-escalation techniques, and empathy-driven communication.

Through these techniques, National CORE successfully managed the property, improving resident outcomes, enhancing community stability, and promoting self-sufficiency among residents.

TYPES OF POPULATION SERVED AND MANAGEMENT TECHNIQUES

National CORE has served a diverse range of populations, including families, seniors, individuals with disabilities, veterans, and individuals experiencing homelessness. The management techniques employed vary based on the specific needs of each population but may include:

Tailored Support Services: Offering on-site support services tailored to the unique needs of each population, such as childcare, transportation assistance, and health and wellness programs.

Culturally Competent Care: Providing culturally competent care and services that respect the diversity and backgrounds of residents, including language-specific support and culturally sensitive programming.

Accessibility Features: Implementing accessibility features and accommodations to ensure that properties are inclusive and accessible to individuals with disabilities.

Community Building: Facilitating community-building activities and events to foster connections among residents, promote social cohesion, and create a sense of belonging.

Housing First Approach: Embracing a Housing First approach that prioritizes providing stable housing as a first step toward addressing other needs, such as employment, healthcare, and social integration.

By employing these techniques, National CORE effectively manages properties, promotes resident well-being, and contributes to the overall success of communities.

LIST OF REFERENCES

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The Housing Authority of the City of Los Angeles
 Contract Date: January 1, 2025
 800+ Units

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	MIRAFLORES Anaheim, CA Start in 2022 Completion in 2024	86	29 1-bedroom 35 2-bedroom 22 3-bedroom	30%, 50%, 60% AMI	New Construction Family 100% Affordable	8	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Public Flex Space Outdoor Pool and Lounge Area Playground Community Garden	OCHF 9% Low Income Tax Credits City of Anaheim
	SANTA ANGELINA Placentia, CA Start in 2022 Completion in 2024	65	1 Studio 58 1-bedroom 6 2-bedroom	30%, 50%, 60% AMI	New Construction Senior Special Needs Homeless 100% Affordable	21	Developer General Contractor Property Manager Supportive Services Provider	Senior community center Outdoor courtyards with event space Passive landscaped seating areas	HCD Accelerator Program HCD NPLH Special Needs Housing Program OCHF County of Orange
	LAS DAHLIAS Los Angeles, CA Start in 2021 Completion in 2024	78	20 Studios 49 1-bedroom 8 2-bedroom	30%, 50%, 60% AMI	New Construction Family Special Needs Homeless 100% Affordable	39	Developer General Contractor Property Manager Supportive Services Provider	Community Center Pocket Park Rooftop Terrace Forecourt Plaza	California Affordable Housing Sustainable Communities 4% Tax Exempt Bonds LACDA
	VISTA DE LA SIERRA Riverside, CA Start in 2022 Completion in 2024	80	40 1-bedroom 20 2-bedroom 20 3-bedroom	30%, 50%, 60% AMI	New Construction Family Special Needs	39	Owner Developer General Contractor Property Manager Supportive Services Provider	Multipurpose room Tot Lot Pool BBQ Area Activity Lawn	4% Low Income Tax Credits City of Riverside County of Riverside HCD NPLH AHP
	METRO VIEW Rialto, CA Start in 2022 Completion in 2024	55	23 1-bedroom 14 2-bedroom 17 3-bedroom 1 Manager's Unit	30%, 40%, 50%, and 60% AMI	New Construction Family Special Needs 100% Affordable	0	Co-Developer Supportive Services Provider	Computer Lab Lot/Play Area Pool with Kitchen Swimming Community Room BBQ and Picnic Areas	9% Low Income Tax Credits City of Rialto San Bernardino County
	VALLEY SENIOR Escondido, CA Start in 2021 Completion in 2023	50	49 Studios 1 2-bedroom	30%, 50%, 60% AMI	New Construction Senior Special Needs Homeless 100% Affordable	25	Developer General Contractor Property Manager Supportive Services Provider	Senior Center Outdoor Lounge Area Outdoor Recreation Area	City of Escondido, County of San Diego NPLH & IHIF, AHP, Tax Credit Equity, Convention Construction and Permanent debt
	MOUNTAIN VIEW Lake Forest, CA Start in 2022 Completion in 2023	71	18 1-bedroom 35 2-bedroom 18 3-bedroom	30%, 40%, 50%, 60% AMI	New Construction Family Special Needs Homeless 100% Affordable	8	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Playground Outdoor Lounge Area	9% TCAC, City of Lake Forest, SNHP/IMHSA, County of Orange, OCHF, CCRC
	456 WEST San Pedro, CA Start in 2021 Completion in 2023	91	5 Studios 27 1-bedrooms 35 2-bedrooms 23 3-bedroom	30%, 40%, 50%, 60%, 80% AMI	New Construction Family 100% Affordable	0	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Room Workforce Housing Bike Parking Ground Floor Commercial	9% TCAC, HCID LA
	LEGACY SQUARE Santa Ana, CA Start in 2021 Completion in 2023	93	30 1-bedroom 39 2-bedroom 24 3-bedroom	25%, 30%, 50%, 60% AMI	New Construction Family Special Needs Homeless 100% Affordable	33	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Mixed Use/Flex Space Office Space Public Art	4% TCAC, CalHFA SNHP, NPLH, AHSC HCD
	CATHEDRAL PALMS Cathedral City, CA Originally Acquired 1997 Refinanced in 2022	224	191 Studios 40 2-Bedroom	40%, 50% AMI	Acq/Rehab Senior 100% Affordable	68	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool and Spa Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	County of Riverside HOME, City of Cathedral RDA, FHLB AHP, Permanent bank loan
	NESTOR SENIOR VILLAGE San Diego, CA Start in 2021 Completion in 2022	74	73 Studios 1 Manager Unit	25%, 30% AMI	New Construction 100% Special Needs Homeless	73	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Outdoor passive recreation areas Lounge Areas Recreational Courtyard	SDHC, County of San Diego NPLH, Tax Credit Equity, Conventional Construction/Perm Debt
	VILLA SERENA PHASE 1 San Marcos, CA Start in 2021 Completion in 2022	85	18 1-bedroom 41 2-bedroom 25 3-bedroom 1 Manager's Unit	30%, 40%, 50%, and 60% AMI	New Construction Family Special Needs 100% Affordable	8	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Playground/Tot Lot Outdoor Lounge Area	9% Low Income Housing Tax Credits City of San Marcos, County of San Diego, Special Needs Housing Program CCRC
	COLLETT CROSSINGS Riverside, CA Start in 2020 Completion in 2022	34	SF Homes 12 - 3-bedrooms 22 - 4-bedrooms	80% AMI	New Construction Single Family Mixed Income Home Ownership	0	Developer General Contractor	Playground Walking Trails with outdoor fitness equipment BBQ Stations	City of Riverside Silent Second Loan
	FAIRVIEW HEIGHTS Inglewood, CA Start in 2020 Completed in 2022	101	51 1-bedroom 25 2-bedroom 25 3-bedroom	30%, 50%, 80% AMI	New Construction Mixed-Income Formerly Homeless	50	Owner Developer General Contractor Property Manager	Community Center Outdoor seating area Outdoor play area Bike parking Ground floor retail	County of Los Angeles LACDA Bank of America 4% TCAC

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	DAY CREEK VILLAS Rancho Cucamonga, CA Start in 2019 Completed in 2021	140	131 1-Bedroom 9 2-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Senior 100% Affordable	10	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Warming Lobby Fitness Room Computer Room Pool Outdoor Fireplaces Bike Storage	City of Rancho Cucamonga 9% Low Income Housing Tax Credit FHLB AHP Loan City Land Loan
	VETERANS PARK Pomona CA Start in 2020 Completed in 2021	61	25 1-bedroom 15 2-bedroom 20 3-bedroom 1 Manager's Unit	30%, 50%, 60% AMI	New Construction Special Needs Veterans	60	Owner Co-Developer Property Manager Supportive Services Provider	Veteran's Center Children's Play Area Community Room Conference Space Counseling Offices Stations Gathering Spaces BBQ Outdoor	LACDA VHP 9% Low Income Housing Tax Credit
	CRESTVIEW TERRACE San Bernardino CA Start in 2019 Completed in 2021	184	28 1-Bedroom 102 2-Bedroom 46 3-Bedroom 10 4-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family Mixed Income	0	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Center Laundry Facilities Pool Tot Lots Community Garden Private Bike Storage Computer	AHSC HRI Grant AHSC AHD Loan HUD 221(d)(4) City of San Bernardino Loan County of San Bernardino Loan HACSB GP Equity/Def Dev Fee
	VISTA VERDE Ontario, CA Start in 2019 Completed in 2021	101	69 2-Bedroom 32 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Center Laundry Facilities Pool Community Garden Private Bike Storage Computer	Affordable Housing and Sustainable Communities Loan City of Ontario Land Loan City of Ontario Loan 4% Low Income Housing Tax Credit Permanent Loan
	VISTA GRANDE COURT 1116 Sonora Avenue Glendale, CA Start in 2018 Completed in 2020	66	60 1-Bedroom 6 2-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Senior 100% Affordable	7	Owner Developer General Contractor Property Manager Supportive Services Provider	Large Resident Community Center Community Garden Outdoor Fireplace BBQ Area Computer Room Elevator Laundry Facilities	City of Glendale Capital One, NA Century Housing CA Tax Credit Allocation Committee Raymond James Tax Credit Funds FHLB of San Francisco AHP Funds (City National Bank)
	SAN YSIDRO VILLAGE 517 W. San Ysidro Blvd. San Diego, CA Completed in 2020	51	50 studio units 1 2-bedroom manager's unit	30%, 45%, 50% AMI	New Construction Senior 100% Affordable Special Needs - Homeless	12	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Room Bicycle Storage Area Community Garden Gathering Spaces Outdoor	City of San Diego Funds SDHC Funds Pacific Western Bank Construction and Permanent Loans HOUSING FIRST – SAN DIEGO Rental Housing Vouchers Federal Home Loan Bank – San Francisco AHP Funds 9% LIHTC (Wells Fargo Investor)
	ENCANTO VILLAGE 6315 Imperial Ave San Diego, CA Start in 2018 Completed in 2020	66	30 1-Bedroom 18 2-Bedroom 18 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Mixed-Use Transit-Oriented Family Seniors Homeless Veterans 100% Affordable	6	Owner Developer General Contractor Property Manager Supportive Services Provider	Across the Street from Trolley Station/Bus Stop Bicycle Storage Areas Community Center Community Gardens EV Charging Stations Onsite Laundry Facilities Outdoor Play Area	U.S. Department of Housing and Urban Development San Diego Housing Commission Civic San Diego Bank of America CATax Credit Allocation Committee
	VISTA DEL PUENTE 1436 South 40th St San Diego, CA Start in 2017 Completed in 2019	52	6 1-Bedroom 30 2-Bedroom 16 3-Bedroom	30%, 40%, 50%, 60% AMI	New Construction Family Special Needs Veterans Formerly Homeless 100% Affordable	38	Owner Developer General Contractor Property Manager	Community Center BBQ Area Laundry Facility Onsite Social Services Outdoor Play Area	CSH Acquisition Loan CA HCD Predevelopment Loan CA HCD VHPH Loan San Diego Housing Commission Loan and Project Based Vouchers City of San Diego BBVA Compass Construction Loan CCRC Permanent Loan Hudson 9% LIHTC Equity Federal Home Loan Bank of SF AHP Home Depot Foundation Grant Funders Together End Homelessness
	OAKCREST HEIGHTS 22744 Eastpark Dr. Yorba Linda, CA Completed in 2017	54	9 1-Bedroom 27 2-Bedroom 18 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable	14	Owner Developer General Contractor Property Manager Supportive Services Provider	Onsite Preschool Community Center Onsite Laundry Facilities Private Patios/Balconies Outdoor Gathering Spaces	Citibank Permanent Loan Raymond James LIHTC Equity – 9% City of Yorba Linda FHLB AHP CHFA - MHSA Orange County Housing Authority County of Orange
	MISSION COVE II 3239 Conch Way Oceanside, CA Completed in 2017	60	32 2-Bedroom 28 3-Bedroom		New Construction Mixed - Use Special Needs 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Preschool Computer Lab In-unit Washers & Dryers Residential Private Outdoor Patio/Balcony Fitness Center Office/Retail Space	City of Oceanside Bank of America Permanent Loan Hudson Housing Capital LIHTC Equity FHLB AHP
	THREE OAKS Santa Clarita, CA Start in March 2016 Completed in 2017	30	21 2-Bedroom 9 3-Bedroom	30%, 40%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Supportive Services Provider	Community Center/Office Area Computer Lab./After-School Program Children's Play Area	LIHTC - 9% RDA/Bond & CDBG Funds Wells Fargo Const & Perm Loan

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	OLIVE MEADOW San Bernardino, CA Start in March 2016 Completed in 2017	62	12 1-Bedroom 30 2-Bedroom 20 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Computer Lab/After-School Program In-unit Washers & Dryers Children's Play Area Fitness Center Elevators in 3-story Building	LIHTC - 9% HUD Rental Assistance Demonstration City HOME Funds Housing Authority of County of San Bernardino, PBVs & Loan Ground Lease FHLB AHP Wells Fargo HUD/FHA 221(d)(4) Loan
	OAKCREST TERRACE Yorba Linda, CA Start in June 2016 Completed in 2017	69	15 1-Bedroom 33 2-Bedroom 21 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/After-School Program Facilities Centralized Laundry Facilities Tot-Lot Computer Lab Elevators in 3-story Building	LIHTC - 9% FHLB AHP City of Yorba Linda RDA Loan Citibank Const & Perm Loans Subordinate Loan Citibank
	MISSION COVE I Oceanside, CA Start in 2016 Completed in 2017	90	26 1-Bedroom 32 2-Bedroom 32 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Mixed - Use Special Needs 100% Affordable	19	Owner Co-Developer General Contractor Property Manager Supportive Services Provider	Community Center/Preschool Computer Lab In-unit Washers & Dryers Residential Private Outdoor Patio/Balcony Fitness Center Office/Retail Space	LIHTC - 9% (Wells Fargo as Investor) FHLB AHP City HOME Funds & Ground Lease UrbanLIFT Grant Citibank Const & Perm Loans Subordinate Loan FHLB AHP Veterans VHHP Citibank MHSA
	VALENCIA VISTA San Bernardino, CA Start in 2015 Completed in 2016	76	10 1-Bedroom 40 2-Bedroom 22 3-Bedroom 4 4-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Computer Lab In-unit Washers & Dryers Property Management & Maintenance Swimming Pool Fitness Center Elevators in 3-story Building	LIHTC - 9% (Wells Fargo as Investor) HUD Rental Assistance Demonstration City HOME Funds Housing Authority of County of San Bernardino, PBVs & Loan PNC HUD/FHA 221(d)(4) Loan
	MARV'S PLACE Pasadena, CA Start in 2015 Completed in 2016	20	10 1-Bedroom 10 2-Bedroom	30% AMI	New Construction Special Needs Homeless 100% Affordable	5	Owner Developer General Contractor Property Manager	Community Center/Office Area Computer Lab Central Laundry Facilities Property Management & Maintenance	LIHTC - 9% City of Pasadena Housing Funds & PBVs County of Los Angeles Industry & First 5 Funds
	LAS PALMAS VILLAGE 107-115 Ave. Serra San Clemente, CA 92673 Start in 2013 Completed in 2015	19	19 1-Bedroom	30%, 50%, 60% AMI	New Construction Family/Workforce 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Computer Lab Central Laundry Facilities Property Management & Maintenance	LIHTC - 4% City of San Clemente Inclusionary Funds HCD IIG Tax-exempt Bonds (Citibank) Subordinate Loan Citibank
	THE VIEW 8314 2nd Street Downey, CA 90241 Start in 2013 Completed in 2014	50	35 2-Bedroom 15 3-Bedroom	30%, 45%, 50% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Tot-Lot Computer Lab Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Downey HOME/Set-Asides Los Angeles County Industry Funds Permanent Bank Loan with JP Morgan Chase
	SAN EMI 4115 Kingsley St. Montclair, CA 91763 Start in 2013 Completed in May 2014	18	18 1-Bedroom	30%, 45%, 50% AMI	New Construction Special Needs 100% Affordable		Owner Developer Property Manager	Office Area Outdoor Community Areas Share Community Facilities with Adjacent National CORE Projects Property Management & Maintenance	LIHTC - 9% HUD 811 City of Montclair AHP
	DUMOSA SENIOR VILLAGE 57110 Twentynine Palms Hwy Yucca Valley, CA 92884 Completed in 2014	75	74 1-Bedroom 1 2-Bedroom	30%, 40%, 50%, 55% AMI	New Construction Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Computer Lab Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% Town of Yucca Valley Funds County of San Bernardino HOME USDA Section 538 Permanent Loan AHP
	WESTLAKE VILLAGE II 405 & 419 Autumn Drive San Marcos, CA 92069 Completed in February 2014	57	21 1-Bedroom 18 2-Bedroom 18 3-Bedroom	30%, 45%, 50%, 55% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Centralized Laundry Facilities Tot-Lot Outdoor Community Areas Share Community Center with Westlake Village I Property Management & Maintenance	LIHTC - 9% City of San Marcos RDA Loan Permanent Loan
	WESTLAKE VILLAGE I 405 Autumn Drive San Marcos, CA 92069 Completed in November 2013	49	15 1-Bedroom 18 2-Bedroom 16 3-Bedroom	35%, 45%, 50%, 60% AMI	New Construction Family Mixed-Use 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center Centralized Laundry Facilities Learning Center Swimming Pool and Spa Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of San Marcos RDA Loan FHLB AHP Permanent Loan
	DESERT MEADOWS 44071 Clinton St. Indio, CA 92201 Completed in January 2013	80		25%, 35%, 40% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Tot-Lot Computer Lab Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 4% County of Riverside RDA Funds FHLB AHP State of CA HCD MHP Funds

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	ALTA VISTA 5051 E. 3rd St. Los Angeles, CA 90022 Completed in 2012	60	41 2-Bedroom 19 3-Bedroom	30%, 45%, 50% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Tot-Lot Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Los Angeles County Industry Funds Los Angeles County CDC HOME Los Angeles County 1st District Funds State of CA HCD IIG State of CA HCD TOD LIHTC - 9% Permanent Bank Loan
	ENCANTO COURT 1345 W. 105th St. Los Angeles, CA 90044 Completed in 2012	62	56 1-Bedroom 6 2-Bedroom	25%, 45%, 50% AMI	New Construction Senior Infill 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Security Gates and Fencing Property Management & Maintenance	LIHTC - 9% CDC HOME/DDA Loan CDC CCP Homeless Loan Infill Infrastructure Grant HACOLA Industry Loan FHLB AHP Permanent Loan Developer Equity
	SIGNATURE AT FAIRFIELD 1189 Tabor Ave. Fairfield, CA 94533 Completed in 2012	93		30%, 40%, 50%, 60% AMI	Acq/Rehab Family 100% Affordable	10	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facility Outdoor Community Areas Tot-Lot Swimming Pool Learning Center Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% CalHFA MHSA State of CA HOME Funds City of Fairfield RDA Funds Permanent Loan Developer Equity
	JUNIPER SENIOR VILLAGE 215 E. Washington Avenue Escondido, CA 92025 Completed in 2011	61		35%, 45%, 50, 60% AMI	New Construction Senior 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Swimming Pool and Spa Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Escondido RDA/HOME Loan HCD Infill Infrastructure Grant Permanent Loan Developer Equity
	VISTA DEL CIELO 10319 Mills Avenue Montclair, CA 91763 Completed in 2011	50	1 1-Bedroom 34 2-Bedroom 15 3-Bedroom	30%, 45%, 50, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% County of San Bernardino HOME Loan City of Montclair RDA Loan Permanent Bank Loan Developer Equity
	RIVER CANYON 34300 Corregidor Drive Cathedral City, CA 92234 Completed in April 2010	60	41 2-Bedroom 19 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Cathedral City RDA Loan Infill Grant Permanent Loan Developer Equity County of Riverside Home Funds
	MISSION VILLAGE SENIOR 8989 Mission Blvd. Riverside, CA 92509 Completed 2010	110	99 1-Bedroom 11 2-Bedroom	50% AMI	New Construction Senior 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Swimming Pool and Spa Outdoor Community Areas Property Management & Maintenance	Tax Exempt Bonds LIHTC - 4% City of Riverside RDA Loan FHLB AHP Permanent Loan Developer Equity
	SAN MARINO 10355 Mills Avenue Montclair, CA 91763 Completed 2010	85	84 1-Bedroom 1 2-Bedroom	50%, 60% AMI	New Construction Senior 3 Phase Project 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Outdoor Community Areas Centralized Laundry Facilities Security Gates and Fencing Property Management & Maintenance	LIHTC - 9% HUD 202 HUD Predevelopment Loan City of Montclair RDA Loan FHLB AHP Permanent Loan Developer Equity
	TRES LOMAS 4343 Toland Way Los Angeles, CA 90041 Completed 2010	46	45 1-Bedroom 1 2-Bedroom	30%, 40%, 50%, 60% AMI	Acq/Rehab Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Outdoor Community Areas Centralized Laundry Facilities Security Gates and Fencing Property Management & Maintenance	LIHTC - 4% HCD MHP Loan LAHD Permanent Loan Developers Equity
	VISTA CASCADE 1432 N. Willow Avenue Rialto, CA Completed in 2010	42	29 2-Bedroom 13 3-Bedroom	50% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Computer Lab Fitness Center Outdoor Community Area Property Management & Maintenance	LIHTC - 4% HCD MHP Loan AHP Permanent Loan Developers Equity
	RANCHO VERDE EAST EXPANSION 8837 Grove Avenue Rancho Cucamonga, CA Completed in 2009	40	40 3-Bedroom	35%, 45%, 60% AMI	New Construction Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center with Service Kitchen Centralized Laundry Facilities Security Gates and Fencing Tot Lot Outdoor Community Areas Property Management and Maintenance	Tax Exempt Bonds LIHTC - 4% County of San Bernardino HOME Loan City of Rancho Cucamonga RDA Loan Permanent Loan Developer Equity
	SUMMER TERRACE 38500 Tierra Subida Avenue Palmdale, CA Completed in 2009	80		30%, 45%, 50%, 60% AMI	New Construction Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Outdoor Community Areas Computer Lab Centralized Laundry Facilities Security Gates and Fencing Property Management & Maintenance	LIHTC - 9% City of Palmdale RDA Loan City of Palmdale HOME Loan City of Palmdale Fee Waivers FHLB AHP Permanent Loan Developer Equity

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	VILLAGGIO ON ROUTE 66 10220 Foothill Blvd. Rancho Cucamonga, CA Completed in 2009	166	104 2-Bedroom 62 2-Bedroom	35%, 45%, 60% AMI	New Construction Family Mixed Market Rate & Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Tot Lot Learning Center Outdoor Community Areas Property Management & Maintenance	Tax Exempt Bonds LIHTC - 4% HCD MHP City of Rancho Cucamonga RDA Loan Permanent Loan Developer Equity
	VILLA PLUMOSA 4672 Plumosa Drive Yorba Linda, CA 92886 Completed in 2009	76	52 2-Bedroom 24 3-Bedroom	30%, 45%, 50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Yorba Linda RDA Loan Permanent Loan Developer Equity
	CAPE COD VILLAS 1710 Maxson Street Oceanside, CA 92054 Completed in 2008	36	36 1-Bedroom	30%, 50%, 60% AMI	Acq/Rehab Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% City of Oceanside RDA Loan
	CITRUS GROVE AT RIALTO 1432 Willow Avenue Rialto, CA 92376 Completed in 2008	152	100 2-Bedroom 52 3-Bedroom	30%, 40%, 50%, 60% AMI	Acq/Rehab Family 2 Phase Project 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Computer Lab Fitness Center Outdoor Community Area Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP/MHP-NSSS CalHFA HELP Loan San Bernardino County HOME Loan City of Rialto RDA Loan FHLB AHP Permanent Bank Loan Developer Equity
	LA MISION VILLAGE 3220 Mision Avenue Oceanside, CA 92054 Completed in 2008	80	3 1-Bedroom 46 2-Bedroom 31 3-Bedroom	40%, 60% AMI	New Construction Family 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Day Care Center with a Service Kitchen Commercial Lease Area Tot-Lot Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP Loan City of Oceanside RDA Loan Permanent Loan
	VISTA DUNES 44-950 Vista Dunes Lane La Quinta, CA 92201 Completed in 2008	80	14 1-Bedroom 38 2-Bedroom 28 3-Bedroom	30%, 45%, 50% AMI	New Construction Family Certified LEED Platinum 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Sports Court Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of La Quinta RDA Loan Permanent Loan
	WHISPERING PALMS 38250 Ninth Street Palmdale, CA 93550 Completed in 2008	75		50% AMI	New Construction Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Security Gates and Fencing Outdoor Community Areas Property Management & Maintenance	Tax Exempt Bonds LIHTC - 4% HCD State HOME Loan City of Palmdale RDA Loan FHLB AHP Permanent Bank Loan Developer Equity
	NORTHGATE VILLAGE 17251 Dante Street Victorville, CA 92392 Completed in 2007	140	42 1-Bedroom 73 2-Bedroom 25 3-Bedroom	50%, 80% AMI	Acq/Rehab Family 100% Affordable	12	Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Tot Lot Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP City of Victorville RDA Loan Permanent Loan Developer Equity
	PARK VIEW TERRACE 6728 Clara Street Bell Gardens, CA 90201 Completed in 2007	72	65 1-Bedroom 7 2-Bedroom	50% AMI	New Construction Senior Infill 100% Affordable		Owner Developer Property Manager	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Fitness Center Reflection Pond Outdoor Patio/Picnic Area Central Courtyard Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HACOLA HOME Loan LACDC Loan City of Industry Loan City of Bell Gardens CDC Loan FHLB AHP Developer Equity
	SAN ANTONIO VISTA 10410 Pradera Avenue Montclair, CA 91763 Completed in 2007	75	50 2-Bedroom 25 3-Bedroom	30%, 45%, 50%, 60% AMI	New Construction Family 3 Phase Project 100% Affordable		Owner Developer General Contractor Property Manager Co-Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Outdoor Community Areas Tot-Lot Swimming Pool Property Management & Maintenance	LIHTC - 9% County of San Bernardino HOME Loan City of Montclair RDA Loan Permanent Bank Loan Developer Equity
	SUNSET HEIGHTS 6230 Haven Avenue Alta Loma, CA 91737 Completed in 2007	117	80 2-Bedroom 37 3-Bedroom	35%, 45%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Learning Center Computer Lab Outdoor Patio/Picnic Area Tot-Lot Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% CalHFA Perm - A Bonds CalHFA Perm - B Bonds City of Rancho Cucamonga RDA Loan

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	INDIAN WELLS VILLAS 74-800 Valley Center Drive Indian Wells, CA 92210 Completed in 2006	90		50%, 80%, 120% AMI	Acq/Rehab Senior 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Clubhouse Fitness Center Swimming Pool & Spa Outdoor Community Area Property Management & Maintenance	City of Indian Wells RDA Loan
	MELROSE VILLAS 1820 Melrose Drive San Marcos, CA 92069 Completed in 2006	114	12 1-Bedroom 63 2-Bedroom 39 3-Bedroom	35%, 60% AMI	New Construction Family Inclusionary 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Learning Center Computer Lab Outdoor Patio/Picnic Area Tot-Lot Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP Loan Developer Equity
	TALMADGE SENIOR VILLAGE 5252 El Cajon Boulevard San Diego, CA 92115 Completed in 2006	91	88 1-Bedroom 3 2-Bedroom	30%, 45%, 50% AMI	New Construction Senior Infill 100% Affordable		Owner Developer Property Manager Co-Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Underground Parking Computer Lab Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of San Diego RDA NOFA Loan Permanent Bank Loan Developer Equity
	VISTA TERRAZA 7735 Via Solare San Diego, CA 92129 Completed in 2006	123	12 1-Bedroom 71 2-Bedroom 40 3-Bedroom	35%, 60% AMI	New Construction Family Inclusionary 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Learning Center Swimming Pool and Spa Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP Loan Developer Equity
	FOUNTAINS AT SIERRA 16946 Ceres Avenue Fontana, CA 92335 Completed in 2005	93	75 1-Bedroom 18 2-Bedroom	30%, 45%, 50% AMI	New Construction Senior 3 Phase Project 100% Affordable		Co-Owner Co-Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Fitness Room Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Fontana RDA Loan FHLB AHP CCRC Permanent Loan
	GARDENS AT SIERRA 16838 Ceres Avenue Fontana, CA 92335 Completed in 2005	93	75 1-Bedroom 18 2-Bedroom	50% AMI	New Construction Senior 3 Phase Project 100% Affordable		Co-Owner Co-Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Fitness Room Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% City of Fontana RDA Loan FHLB AHP CCRC Permanent Loan
	HAWTHORNE TERRACE 13006 Kornblum Avenue Hawthorne, CA 90250 Completed in 2005	100	40 1-Bedroom 36 2-Bedroom 24 3-Bedroom	35%, 50%, 60%, 80% AMI	Acq/Rehab Family Inclusionary 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Tot Lot Learning Center Outdoor Community Areas Property Management & Maintenance	CCRC Permanent Loan Developer Equity
	MISSION POINTE 2750 Topaz Drive Riverside, CA 92507 Completed in 2005	64	44 2-Bedroom 20 3-Bedroom	40%, 55% AMI	Acq/Rehab Family Neighborhood Revitalization 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Learning Center Computer Lab Outdoor Community Area Swimming Pool Tot-Lot Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP Permanent Loan Developer Equity
	CLARK MANOR 13032 Clark Avenue Downey, CA 90242 Completed in 2004	41	13 1-Bedroom 20 2-Bedroom 8 3-Bedroom	35%, 50%, 60%, 80% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Laundry Facility Property Management & Maintenance	City of Downey HOME Loan Washington Mutual
	MOUNTAIN VIEW VILLAS 78-000 Betty Barker Way Indian Wells, CA 92210 Completed in 2004	128		50%, 80%, 120% AMI	New Construction Senior 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Fitness Center Computer Lab Outdoor Community Areas Property Management & Maintenance	City of Indian Wells RDA Loan
	MULBERRY VILLAS 14950 Mulberry Drive Whittier, CA 90604 Completed in 2004	51	31 1-Bedroom 20 2-Bedroom	35%, 50%, 60%, 80% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Washington Mutual Permanent Loan

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	LITTLE LAKE VILLAGE 10902 Fulton Wells Avenue Santa Fe Springs, CA 90670 Completed in 2003	144	120 1-Bedroom 24 2-Bedroom	50%, 60% AMI	New Construction Senior 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Computer Lab Outdoor Community Area Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% LACDC HOME Loan City of Industry Loan City of Santa Fe Springs CDC Loan Permanent Loan
	OAKS ON FLORENCE 4224 Florence Avenue Bell, CA 90201 Completed in 2003	63	55 1-Bedroom 8 2-Bedroom	50% AMI	New Construction Senior Infill 100% Affordable		Owner Developer Property Manager Co-Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Computer Lab Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% City of Industry Loan Bell Land Loan LACDC HOME Loan FHLLB AHP Developer Equity
	SHADOW HILL 11085 Woodside Avenue Santee, CA 92071 Completed in 2003	82	44 2-Bedroom 38 3 Bedroom	20%, 30%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Outdoor Community Areas Tot-Lot Swimming Pool Learning Center Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP CalHFA HELP County of San Diego HOME/HOPWA City of Santee CDC Loan Permanent Loan Developer Equity
	SPRING VALLEY 8885 Orville Street Spring Valley, CA 91977 Completed in 2003	60	16 Efficiency 27 1-Bedroom 16 2-Bedroom	50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facility Outdoor Community Areas Tot-Lot Swimming Pool Learning Center Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% County of San Diego HOME/HOPWA Loan Permanent Loan Developer Equity
	VILLAGE AT SIERRA 8684 Sierra Avenue Fontana, CA 92335 Completed in 2003	108	107 1-Bedroom 1 2-Bedroom	45%, 50%, 60% AMI	New Construction Senior 3 Phase Project 100% Affordable		Co-Owner Co-Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Fitness Room Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Fontana RDA Loan FHLLB AHP CCRC Permanent Loan
	HERITAGE POINTE 8590 Malven Avenue Rancho Cucamonga, CA 91730 Completed in 2003	49	49 1-Bedroom	35%, 45%, 60% AMI	New Construction Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Computer Lab Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% County of San Bernardino HOME Loan MHRB/Rancho Cucamonga RDA Loan Permanent Loan (WAMU)
	IMPRESSIONS AT VALLEY CENTER 15500 Midtown Drive Victorville, CA 92392 Completed in 2003	100	68 2-Bedroom 32 3-Bedroom	45%, 50% AMI	New Construction Family 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Computer Lab Learning Center Tot-Lot Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% San Bernardino County HOME Loan City of Victorville RDA Loan Permanent Loan Developer Equity
	COBBLESTONE VILLAGE 360 E. Washington Avenue Escondido, CA 92025 Completed in 2002	44	44 3-Bedroom	20%, 30%, 60% AMI 100% Affordable	Acq/Rehab Family All-3 Bedrooms		Owner Developer General Contractor Property Manager Supportive Services Provider	Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% HCD MHP City of Escondido RDA Loan FHLLB AHP CCRC Permanent Loan Developer Equity
	PARKSIDE 4035 Park Haven Court, #D San Diego, CA 92113 Completed in 2002	40	5 1-Bedroom 30 2-Bedroom 5 3-Bedroom	50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Learning Center Tot Lot Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% San Diego Housing Commission Funds Permanent Loan Developer Equity
	PASEO DEL ORO 432 West Mission Road, Suite 106 San Marcos, CA 92069 Completed in 2002	120	24 1-Bedroom 59 2-Bedroom 37 3-Bedroom	30%, 45%, 50% AMI	New Construction Family Mixed-Use Smarth Growth Mixed Market-Rate & Affordable		Co-Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Learning Center Swimming Pool Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% County of San Diego HOME/HOPWA Loan City of San Marcos RDA Loan FHLLB AHP Permanent Loan
	SUMMERIDGE 818 E. Alvarado Street Fallbrook, CA 92028 Completed in 2002	96	32 Efficiency 48 1-Bedroom 16 2-Bedroom	50%, 60%, 80% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facility Outdoor Community Areas Tot-Lot Swimming Pool and Spa Learning Center Property Management & Maintenance	CalHFA HELP County of San Diego HOME Funds Permanent Loan
	CORONA DE ORO 680 West Second Street Corona, CA 92882 Completed in 2001	72	50 2-Bedroom 22 3-Bedroom	45%, 50% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Tot-Lot Learning Center Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% City of Corona HOME Loan City of Corona RDA Loan FHLLB AHP Permanent Bank Loan

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	SIERRA VISTA 422 Los Vallecitos Boulevard San Marcos, CA 92069 Completed in 2001	192	96 2-Bedroom 96 3-Bedroom	50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Outdoor Community Areas Tot-Lot Swimming Pool and Spa Learning Center Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% County of San Diego HOME/HOPWA Loan City of San Marcos RDA Loan Permanent Loan
	CROSSINGS 177 W. South Street Rialto, CA 92376 Completed in 2000	100	48 2-Bedroom 52 3-Bedroom	30%, 45%, 50% AMI	New Construction Family 100% Affordable		Owner Developer Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Tot-Lot Computer Lab Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	LIHTC - 9% County of San Bernardino HOME Funds FHLLB AHP Permanent Bank Loan
	VISTA DEL SOL 1545 Q Avenue National City, CA 91950 Completed in 2000	132	76 1-Bedroom 48 2-Bedroom 8 3-Bedroom	50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Tot Lot Learning Center Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% City of National City CDC Loan Permanent Bank Loan
	ARBOR VILLAS 4661 Plumosa Drive Yorba Linda, CA 92886 Completed in 1999	67	7 40% AMI 26 50% AMI 34 60% AMI	40%, 50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Tot-Lot Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	City of Yorba Linda RDA Loan FHLLB AHP Permanent Bank Loan
	CORONA DEL REY 1148 D Street Corona, CA 92882 Completed in 1999	160	160 2-Bedroom	50%, 60%, 80% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Tot-Lot Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	County of Riverside HOME Loan City of Corona HOME Loan City of Corona RDA Loan FHLLB AHP Permanent Bank Loan
	PROMENADE 1333 W. Garvey Avenue North West Covina, CA 91790 Completed in 1999	124	28 Studio 96 1-Bedroom	40%, 50%, 60% AMI	Acq/Rehab Family Hotel Conversion 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Tot Lot Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% City of West Covina RDA Loan FHLLB AHP Permanent Loan
	SUMMERWOOD 38272 11th Street East Palmdale, CA 93550 Completed in 1999	54	16 1-Bedroom 37 2-Bedroom 1 3-Bedroom	40%, 50% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facility Outdoor Community Areas Tot-Lot Property Management & Maintenance	City of Palmdale RDA Loan FHLLB AHP Washington Mutual Permanent Loan
	VILLA SERENA 339-340 Marcos Street San Marcos, CA 92069 Completed in 1999	136	36 1-Bedroom 98 2-Bedroom 2 3-Bedroom	35%, 45%, 50%, 60% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Swimming Pool Tot Lot Outdoor Community Areas Property Management & Maintenance	Tax-Exempt Bonds LIHTC - 4% County of San Diego HOME Loan City of San Marcos RDA Loan FHLLB AHP Permanent Loan
	BRAVO MOBILE HOME PARK 4041 Pedley Road Riverside, CA 92509 Completed in 1999	156		50%, 80%, 120% AMI	Acq/Rehab Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Tot-Lot Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	Mobile Home Park Revenue Bonds County of Riverside EDA Loan
	LA QUINTA 38301 11th Street East Palmdale, CA 93550 Completed in 1997	100	16 1-Bedroom 84 2-Bedroom	40%, 50% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Tot Lot Learning Center Outdoor Community Area Property Management & Maintenance	City of Palmdale RDA Loan FHLLB AHP Washington Mutual Permanent Loan
	PARK VISTA 38204 11th Street East Palmdale, CA 93550 Completed in 1997	28	51 1-Bedroom 23 2-Bedroom	40%, 50% AMI	Acq/Rehab Family 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Centralized Laundry Facilities Tot Lot Outdoor Community Areas Property Management & Maintenance	City of Palmdale RDA Loan FHLLB AHP Washington Mutual Permanent Loan

	PROPERTY NAME & LOCATION	TOTAL UNITS	UNIT MIX	AMI	PROJECT TYPE	SPECIAL NEEDS UNITS	ROLE	ONSITE AMENITIES	FINANCING SOURCES
	COLONY 221 New York Street Redlands, CA 92373 Completed in 1996	88	20 1-Bedroom 68 2-Bedroom	40%, 50% AMI	Acq/Rehab Family Mixed Market-Rate & Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Swimming Pool Computer Lab Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	City of San Bernardino HOME Loan Permanent Loan
	IMPRESSIONS 38055 10th Street East Palmdale, CA 93550 Completed in 1996	109	24 Studio 56 1-Bedroom 29 2-Bedroom	40%, 50% AMI	Acq/Rehab Senior 100% Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Outdoor Community Areas Property Management & Maintenance	City of Palmdale RDA Loan FHLB AHP Washington Mutual Permanent Loan
	MONTEREY VILLAGE 10244 Arrow Route Rancho Cucamonga, CA 91730 Completed in 1996	224	96 1-Bedroom 128 2-Bedroom	35%, 45%, 60%, 80% AMI	Acq/Rehab Family Mixed Market-Rate & Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Swimming Pool (2) and Spa Tot-Lot (2) Sports Courts Tennis Court Fitness Center Central Laundry Facilities Outdoor Community Areas Property Management & Maintenance	CalHFA City of Rancho Cucamonga RDA Loan Permanent Bank Loan
	MOUNTAINSIDE 9181 Foothill Boulevard Rancho Cucamonga, CA 91730 Completed in 1996	384	160 1-Bedroom 224 2-Bedroom	35%, 45%, 60%, 80% AMI	Acq/Rehab Family Mixed Market-Rate & Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Computer Lab Learning Center Sports Courts Outdoor Community Areas Property Management & Maintenance	CalHFA City of Rancho Cucamonga RDA Loan Permanent Bank Loan
	RENAISSANCE VILLAGE 220 N. Glenwood Avenue Rialto, CA 92376 Completed in 1996	144	18 1-Bedroom 35 2-Bedroom 90 3-Bedroom 1 4-Bedroom	50%, 60% AMI	Acq/Rehab Family Neighborhood Revitalization 100% Affordable		Owner Developer General Contractor Property Manager Co-Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool Tot Lot Learning Center Outdoor Community Areas Property Management & Maintenance	City of Rialto RDA Loan FHLB AHP Permanent Loan
	SYCAMORE SPRINGS 7127 Archibald Avenue Alta Loma, CA 91701 Completed in 1995	240	96 1-Bedroom 144 2-Bedroom	35%, 45%, 60%, 80% AMI	Acq/Rehab Family Mixed Market-Rate & Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area with a Service Kitchen Centralized Laundry Facilities Learning Center Outdoor Patio/Picnic Area Tot-Lot Property Management & Maintenance	CalHFA City of Rancho Cucamonga RDA Loan Permanent Bank Loan
	RANCHO VERDE VILLAGE 8837 Grove Avenue Rancho Cucamonga, CA 91730 Completed in 1993	248	120 1-Bedroom 128 2-Bedroom	35%, 45%, 60%, 80% AMI	Acq/Rehab Family Mixed Market-Rate & Affordable		Owner Developer General Contractor Property Manager Supportive Services Provider	Community Center/Office Area Centralized Laundry Facilities Swimming Pool and Spa Tot Lot Learning Center Outdoor Community Areas Property Management & Maintenance	City of Rancho Cucamonga RDA Loan Essex Corporation Permanent Bank Loan



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
1/2/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER IMA, Inc. - Colorado Division 1705 17th Street, Suite 100 Denver CO 80202	CONTACT NAME: IMA Denver Team PHONE (A/C, No, Ext): 303-534-4567 E-MAIL ADDRESS: DenAccountTechs@imacorp.com	FAX (A/C, No):	
	INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED National Community Renaissance of California 9692 Haven Avenue, Suite 100 Rancho Cucamonga CA 91730	INSURER A : James River Insurance Company		12203
	INSURER B : *Lexington Insurance Co		19437
	INSURER C : The Travelers Indemnity Company of America		25666
	INSURER D : Travelers Property Casualty Company of America		25674
	INSURER E : Great American Assurance Company		26344
INSURER F :			

COVERAGES **CERTIFICATE NUMBER:** 1218492576 **REVISION NUMBER:**

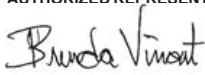
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> \$0 Deductible GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	Y	Y	3406407824	1/1/2024	1/1/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
B	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	3406407824	1/1/2024	1/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000	Y	Y	000876155	1/1/2024	1/1/2025	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
D C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y / N <input checked="" type="checkbox"/> N		N / A	UB-001L807338-24 (CA) UB-001L815418-24 (AOS)	1/1/2024 1/1/2024	1/1/2025 1/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Excess Second Layer Liability	Y	Y	EXC 5200922	1/1/2024	1/1/2025	Each Occurrence \$15,000,000 Aggregate \$15,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Liability Terrorism Coverage: Policy #128416992W24-M
 Effective Dates: 01/01/24 - 01/01/25 Insurer: Underwriters at Lloyd's London
 This is a Claims Made Policy
 \$5,000,000 Any One Claim; \$25,000,000 Annual Aggregate
 Deductible: \$5,000 Per Occurrence
 Extended Reporting Period: 90 days after expiration date of policy.

See Attached...

CERTIFICATE HOLDER CANCELLATION

For Information Only	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 



ADDITIONAL REMARKS SCHEDULE

AGENCY IMA, Inc. - Colorado Division		NAMED INSURED National Community Renaissance of California 9692 Haven Avenue, Suite 100 Rancho Cucamonga CA 91730	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

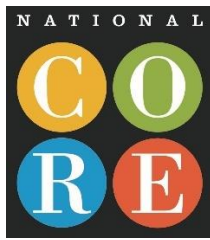
ADDITIONAL REMARKS

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE**

Certificate Holder(s) is included as Additional Insured(s) on the General, Automobile, Excess and Terrorism Liability policies if required by written contract or agreement subject to the policy terms and conditions. A Waiver of Subrogation is provided in favor of Additional Insured(s) on the General, Automobile, Excess and Terrorism Liability policies if required by written contract or agreement subject to the policy terms and conditions. This Insurance is Primary and Non-Contributory on the General, Automobile, Excess and Terrorism Liability policies if required by written contract or agreement and subject to the policy terms and conditions.

As applicable to General Liability & Excess Liability, subject to the policy terms and conditions, there is no exclusion for Abuse & Molestation or Assault and Battery.

Excess Liability provides Terrorism coverage for Certified Terrorism events as declared by the Secretary of the Treasury, the Secretary of State, and the Attorney General of the United States.



Supplemental Questions for the City of Palm Desert RFP 2024-RFP-142

Affordable Housing Compliance and Property Management Services

Provided by National Community Renaissance: National CORE

- 1. Describe specific experiences where the Firm worked directly with tenants to collect income and other necessary information in order to certify tenants for affordable housing programs. Include experience conforming to LIHTC, HOME, or other compliance procedures.**

Answer: National CORE does not currently have rental units in the City of Palm Desert. However, we do have properties in the surrounding areas, including Cathedral City, Yucca Valley, Indio, La Quinta, and Indian Wells. All tenant certifications are conducted by our on-site management teams, which include the manager and supporting staff. While eviction is sometimes necessary, we strive to avoid this outcome whenever possible by exploring alternative solutions. These efforts ensure we can maintain occupancy while adhering to compliance requirements and obtaining the unit efficiently when needed. Typically, evictions are related to lease violations rather than non-payment of rent. Regarding legal matters, National CORE contracts with KTS for eviction-related services. Additionally, we have an in-house General Counsel dedicated to property management matters, ensuring our operations are handled with the highest level of expertise and care.

- 2. Describe the Firm's experience managing properties which house special need and/or elderly tenants.**

Answer: National CORE has extensive experience managing properties that cater to special needs and elderly tenants, reflecting our commitment to providing high-quality, supportive housing for diverse populations.

Specialized Property Management Expertise

National CORE manages numerous properties designed to accommodate the unique requirements of special needs and elderly residents. These include communities with accessible units, age-friendly amenities, and on-site services tailored to enhance the quality of life for these populations.

Supportive Services Integration

Our approach emphasizes the integration of robust supportive services, which we deliver through partnerships with local service providers. For special needs tenants, we coordinate access to case management, mental health services, vocational training, and other resources to support independent living. For elderly residents, services may include wellness programs, transportation assistance, and community-building activities to combat isolation and promote engagement.

Permanent Supportive Housing (PSH)

Through our Permanent Supportive Housing (PSH) programs, National CORE provides stable housing for individuals facing significant challenges, including those with disabilities or experiencing homelessness. We ensure tenants receive personalized support to maintain housing stability while fostering their overall well-being.

Compliance and Accessibility

We prioritize compliance with all relevant federal, state, and local regulations, including those under the Fair Housing Act (FHA) and the Americans with Disabilities Act (ADA). Our staff undergoes regular training to ensure properties remain accessible, safe, and welcoming to all residents.

Dedicated Management Team

Our in-house property management team has specialized training in serving the needs of elderly and special needs populations. This includes expertise in navigating the complexities of funding sources such as Low-Income Housing Tax Credits (LIHTC) and HUD subsidies, ensuring both compliance and financial sustainability.

Through compassionate management and a comprehensive range of services, National CORE fosters an environment where special needs and elderly residents can thrive.

3. Describe the Firm's experience with managing projects requiring relocation.

Answer: National CORE has substantial experience managing projects that involve tenant relocation, demonstrating our commitment to ensuring smooth transitions while maintaining compliance with local, state, and federal regulations.

Expertise in Relocation Management

National CORE has successfully managed numerous projects requiring temporary and permanent relocation, including large-scale renovations, redevelopment, and

property upgrades. We adhere to stringent guidelines under the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA) and applicable state and local relocation laws to ensure fair treatment and minimal disruption to tenants.

Dedicated Relocation Team

We have an experienced in-house relocation team trained to manage every aspect of the process, from planning and communication to execution and follow-up. The team works closely with property managers, residents, and contractors to coordinate timelines and logistics, ensuring compliance and tenant satisfaction.

Resident-Centered Approach

National CORE places tenants at the center of the relocation process, providing personalized assistance and resources to meet their needs. This includes:

- Clear and timely communication about relocation plans, rights, and timelines.
- Assistance in securing temporary housing that meets accessibility and family requirements.
- Support with packing, transportation, and moving logistics.
- Financial assistance as mandated by relocation guidelines.

Effective Coordination

Our team collaborates with contractors and service providers to align relocation schedules with construction timelines, minimizing inconvenience to tenants. Additionally, we maintain open lines of communication with local housing authorities and funding agencies to ensure smooth project execution.

Successful Track Record

National CORE has managed relocation for projects of varying scales, including those involving vulnerable populations such as seniors, families, and individuals with special needs. These efforts have helped preserve housing stability and foster trust within the communities we serve.

Through careful planning, comprehensive support, and a commitment to resident well-being, National CORE has established itself as a trusted partner in managing relocation projects effectively and compassionately.

4. Describe how your entity ensures feedback from tenants on performance of the overall entity's management of the property.

National CORE prioritizes tenant feedback to continuously improve the management of its properties and foster strong, trust-based relationships with residents. Feedback mechanisms are integrated into our operations to ensure tenants' voices are heard and their concerns addressed effectively.

Regular Tenant Surveys

National CORE conducts periodic tenant satisfaction surveys to gauge residents' experiences with property management, maintenance services, community amenities, and overall living conditions. These surveys are analyzed to identify trends, address common concerns, and implement improvements.

Resident Advisory Boards

We encourage tenant participation through the establishment of Resident Advisory Boards or committees. These boards provide a structured platform for residents to share their feedback, propose suggestions, and collaborate with property management to enhance the community's quality of life.

Open Communication Channels

Tenants can provide feedback through multiple channels, including:

- On-site property management offices.
- Dedicated email addresses or phone lines for resident concerns.
- Online portals for submitting maintenance requests or general feedback.

These channels ensure accessibility and convenience for residents to share their input at any time.

Community Meetings

National CORE organizes regular community meetings to discuss property management updates, address resident concerns, and gather direct feedback. These meetings create a collaborative environment and allow for real-time dialogue between tenants and management teams.

Resident Engagement Programs

We foster ongoing communication through resident engagement programs, which include events, workshops, and informal gatherings. These initiatives encourage open dialogue, build community trust, and provide opportunities to receive candid feedback from tenants.

Proactive Issue Resolution

Feedback received is addressed promptly by management teams. National CORE's focus on proactive resolution ensures tenants feel valued and that their concerns are taken seriously.

Continuous Improvement

Feedback is used to inform policy changes, refine operational procedures, and prioritize investments in property improvements. Regular assessments ensure that tenant satisfaction remains central to our management practices.

By fostering open communication and responding effectively to resident input, National CORE ensures its property management strategies align with the needs and expectations of the communities it serves.

5. Describe what systems the Firm has in place that allows the Firm to provide Services efficiently.

National CORE utilizes a range of systems and processes to ensure efficient service delivery across its portfolio of properties. These systems are designed to streamline operations, enhance communication, maintain compliance, and prioritize tenant satisfaction.

Integrated Property Management Software

National CORE employs robust property management software to centralize operations. These platforms allow for:

- Tenant management: Streamlined tracking of lease agreements, certifications, and renewals.
- Maintenance requests: Efficient logging, tracking, and resolution of repair and upkeep needs.
- Rent collection: Simplified and secure payment processing, including online portals for residents.
- Compliance monitoring: Ensures adherence to regulatory requirements, including affordable housing guidelines.

Dedicated Support Teams

Specialized teams within National CORE, such as property management, relocation, and compliance, work collaboratively to address various aspects of service delivery. This organizational structure ensures focus and expertise in critical operational areas.

Resident Communication Systems

To maintain clear and open communication with tenants, National CORE uses:

- Resident portals for submitting requests, paying rent, and accessing community updates.
- Automated notification systems for important reminders such as rent due dates, maintenance schedules, and community events.
- Feedback collection tools to continually assess and improve services.

Preventive Maintenance Programs

National CORE has systems in place to schedule and track routine maintenance and inspections, reducing the likelihood of costly repairs and ensuring properties remain safe and well-maintained.

Standard Operating Procedures (SOPs)

Comprehensive SOPs guide property managers and staff in handling common scenarios efficiently and consistently, from tenant interactions to emergency response protocols.

Staff Training and Development

National CORE invests in ongoing training for its staff, ensuring team members are well-versed in the latest industry best practices, regulatory requirements, and customer service techniques.

Partnerships and Vendor Relationships

National CORE maintains strong relationships with trusted vendors and service providers. These partnerships enable quick access to specialized services, such as pest control, legal support, and construction, ensuring efficient resolution of issues.

Performance Metrics and Reporting

Regular performance monitoring through key performance indicators (KPIs) ensures that property management teams meet efficiency and service quality goals. Reports generated from management systems provide insights to drive data-informed decisions.

Compliance Management Systems

National CORE's compliance tracking systems ensure all properties adhere to funding, legal, and regulatory obligations, particularly for affordable housing and tax credit properties.

Office Hours and Availability

Our on-site staff operates from 8:00 am to 5:00 pm. However, National CORE ensures that our teams are available after hours and on weekends to handle emergencies, including staff, regional managers, maintenance supervisors, or any other personnel who may be needed. Our response time is immediate, as any delays can lead to additional costs. Work orders are typically completed the same day as long as emails and return calls are responded to promptly.

Communication with Housing Authorities

Communication between National CORE and the Housing Authority is done on a weekly or bi-weekly basis, depending on what the Housing Authority prefers. We remain flexible and ensure we are available as needed for ongoing coordination.

Scalable Technology Infrastructure

A scalable technology framework allows National CORE to adapt quickly to portfolio growth, ensuring consistent service quality even as new properties are added.

By leveraging advanced systems, well-defined processes, and skilled teams, National CORE delivers efficient, high-quality service to its residents while maintaining operational excellence.

6. Describe the Firm's experience managing properties which present security conditions requiring interaction with law enforcement agencies.

National CORE has significant experience managing properties that require heightened security measures and collaboration with law enforcement agencies to maintain the safety and well-being of residents. We understand the importance of fostering a secure living environment and have developed comprehensive protocols to address security concerns, prevent crime, and handle situations that may require law enforcement intervention.

Proactive Security Measures

National CORE employs a variety of proactive security strategies designed to prevent incidents before they occur. These measures include:

- 24/7 on-site security personnel where applicable, or partnerships with security companies to monitor properties and respond quickly to any incidents.

- Surveillance systems (CCTV) to monitor common areas and entry points, helping deter criminal activity and providing documentation in the event of an incident.
- Well-lit common areas and building exteriors, which contribute to increased safety and visibility for residents and staff.
- Access control systems such as key fobs, gates, or entry codes to limit unauthorized access to buildings and property.

Collaboration with Law Enforcement

When security concerns arise that require law enforcement intervention, National CORE has established strong relationships with local law enforcement agencies. This allows for swift and coordinated responses to incidents, ensuring that both tenant safety and property security are addressed. Our approach includes:

- Regular communication with local police departments and sheriff's offices to stay informed about any potential security threats in the area and to share relevant information related to property concerns.
- Coordinating with law enforcement in case of emergencies, such as criminal activity, domestic disturbances, or tenant safety issues. In situations where legal or criminal matters are involved, we ensure that appropriate law enforcement personnel are notified and involved in addressing the situation.
- Crime prevention programs and community policing initiatives where local law enforcement may participate in property management meetings, conduct neighborhood watch programs, or offer crime prevention workshops for residents.

Tenant Education and Support

National CORE emphasizes tenant education as part of our commitment to security. We regularly communicate with residents about safety measures, crime prevention tips, and how to report suspicious activity. This encourages residents to be active participants in maintaining a secure environment. Additionally, we provide:

- Tenant safety workshops focused on awareness and prevention strategies.
- Clear reporting systems for tenants to contact property management or law enforcement if they observe concerning behavior or feel unsafe.

Incident Response Protocols

National CORE has well-defined protocols for responding to security incidents, ensuring quick and effective action. These protocols include:

- Immediate response to emergencies, with on-site staff or security dispatched as needed.
- Eviction processes that may be initiated in cases where tenants violate lease terms related to safety or illegal activities.
- Collaboration with legal and law enforcement teams to address issues like drug-related activity, violence, or criminal behavior within the community.

Ongoing Security Assessment

National CORE continuously assesses the security needs of its properties, particularly those in higher-risk areas. Regular security audits are conducted to identify vulnerabilities, and improvements are made based on these assessments. This ongoing evaluation helps us stay ahead of potential risks and ensures that properties remain safe for all residents.

Through these comprehensive strategies and collaborative efforts with law enforcement, National CORE effectively manages properties with complex security challenges, ensuring a safe and secure living environment for all residents.

7. Describe the Firm's rent collection procedure including how the Firm handles late rent payments.

National CORE has a well-defined rent collection procedure designed to ensure timely payments while maintaining flexibility and understanding for residents facing financial challenges. Our goal is to provide a streamlined and consistent process for rent collection, with clear communication to tenants about their responsibilities and the consequences of late payments.

Rent Collection Procedure

1. Payment Methods

National CORE offers multiple convenient payment methods to residents to make rent payments easy and accessible:

- **Online Payment Portal:** Tenants can pay rent securely via a dedicated online portal, which allows for one-time payments or automatic recurring payments.
- **Mail:** Rent payments can be mailed to a designated address.
- **In-Person:** Residents can pay rent at the property office during regular business hours or through an on-site payment system.

- **Third-Party Payment Services:** In some cases, National CORE may partner with third-party payment services to provide additional options for tenants who may prefer alternative payment methods.

2. Payment Due Date

Rent is typically due on the 1st day of each month, with a grace period offered, typically until the 5th day of the month. This allows residents a brief extension in case of delays, while still maintaining a predictable schedule for property management.

3. Late Rent Procedure

If rent is not received by the specified grace period (usually the 5th of the month), National CORE follows a structured late rent procedure:

- **Late Fee Application:** A late fee is automatically applied to accounts that have not been paid by the due date. The late fee amount is clearly outlined in the lease agreement and is designed to encourage timely payments.
- **Reminder Notices:** Tenants who have not paid by the due date are sent a formal reminder notice, typically within a few days after the grace period ends. This notice serves as a gentle reminder to tenants to make their payment or contact the office regarding any issues.
- **Second Notice and Payment Plan Option:** If payment is not received within a set period (e.g., 10-15 days after the due date), National CORE sends a second notice, which may include options for establishing a payment plan for tenants facing temporary financial hardship.

4. Eviction Process (if necessary)

If the rent remains unpaid and there is no response from the tenant after multiple notices, National CORE may initiate the eviction process. This is done in accordance with state and local laws, and typically after 30 days of non-payment or continued late payments. Our approach is to avoid eviction whenever possible and offer tenants alternatives, such as:

- **Payment Plans:** If a tenant is unable to pay the full amount, National CORE works with them to create a payment plan that allows them to pay off their balance over time.
- **Referral to Assistance Programs:** National CORE connects tenants with financial assistance programs, such as government subsidies or local nonprofit organizations, that may help cover rent or offer other financial relief.

5. Consistent Communication and Support

National CORE strives to maintain open lines of communication with tenants regarding rent payments. Our property management teams are available to discuss late payments, potential financial hardship, and other solutions to avoid eviction. We encourage tenants to reach out if they are facing difficulties, as early communication allows us to offer support and alternatives.

6. Regular Reporting and Tracking

The rent collection process is tracked through our property management software, which generates detailed reports for management and accounting teams. This ensures that rent payment status, late fees, and payment arrangements are documented and tracked efficiently.

Handling Late Rent Payments with Sensitivity

While National CORE enforces timely payment of rent, we understand that financial challenges can arise, especially for low-income or vulnerable residents. We aim to be flexible, offering payment plans or alternative options, and working with tenants to resolve issues before resorting to formal eviction. The goal is to maintain a compassionate approach while ensuring the financial health of the property and the long-term stability of our tenants.

In sum, National CORE's rent collection process is built on clear policies, effective communication, and a commitment to working with tenants to address late payments in a fair and supportive manner.

8. Describe the Firm's estimated time to submit standard leasing reports and complete month end financial reports to the Housing Authority (i.e., financial reports will be provided by the ____ day of the month following the month they are for.)

National CORE is committed to providing timely and accurate leasing and financial reports to the Housing Authority to ensure transparency and compliance. Below is the estimated timeline for submitting standard leasing reports and completing month-end financial reports:

Leasing Reports

National CORE aims to submit standard leasing reports to the Housing Authority within 5 business days following the end of the month. These reports typically include details about new leases, move-ins, move-outs, lease renewals, and

occupancy rates. The goal is to ensure that the Housing Authority has up-to-date information on leasing activity as soon as possible.

Month-End Financial Reports

National CORE provides month-end financial reports to the Housing Authority by the 10th business day of the month following the month the reports are for. These reports include detailed financial statements, such as:

- Profit and Loss (P&L) statements
- Balance sheets
- Income and expense reports
- Rent rolls

This timeline allows for the necessary reconciliation of accounts and ensures the financial data provided is accurate and complete. National CORE's accounting team works diligently to meet this deadline, ensuring that all reports are comprehensive and submitted on time for review by the Housing Authority.

By adhering to these timelines, National CORE ensures that the Housing Authority receives the required information promptly, facilitating smooth ongoing operations and compliance with contractual obligations.

9. Do you use property management software for record-keeping purposes? What types of records do you keep and what is your record retention policy?

Yes, National CORE uses Yardi as its primary property management software for record-keeping purposes. Yardi is an integrated platform that helps manage and store all relevant property-related information efficiently. It provides secure, organized access to critical records, ensuring accurate data management, compliance, and operational transparency.

Types of Records Kept in Yardi:

1. Leasing Records:

- Lease Agreements: Original lease documents, amendments, and addendums.
- Tenant Applications: Documentation of applications, background checks, and tenant approvals.
- Move-In/Move-Out Details: Records related to tenant move-ins, move-outs, and inspections.
- Lease Renewals: Renewal agreements and related correspondence.

2. Financial Records:

- Rent Payments: Rent payment history, receipts, and late payment tracking.
- Vendor Invoices: Payment histories for vendors, contractors, and service providers.
- Financial Statements: Monthly and annual financial reports, including Profit & Loss (P&L), balance sheets, and budget tracking.
- Billing and Charges: Utility charges, late fees, and other tenant-related charges.

3. Maintenance Records:

- Work Orders: Documentation of tenant maintenance requests, work order details, completion status, and vendor details.
- Repair and Maintenance History: Records of repairs and improvements made to properties, including recurring issues or major upgrades.
- Service Contracts: Documentation related to ongoing service agreements with vendors and contractors.

4. Compliance and Legal Records:

- Tenant Certifications: Eligibility and income verification records, particularly for subsidized or low-income housing.
- Eviction and Legal Proceedings: Documentation of any tenant eviction processes, disputes, or legal actions.
- Inspections: Inspection reports, results, and any follow-up actions for routine or compliance inspections.
- Fair Housing and Regulatory Compliance: Records of compliance with local, state, and federal housing regulations (e.g., HUD).

5. Communication and Correspondence:

- Tenant Communications: Email and mail correspondence regarding rent reminders, notices, complaints, and resolutions.
- Meeting Notes: Documentation of any discussions or decisions made during tenant meetings or with external stakeholders like Housing Authorities.

Record Retention Policy:

National CORE maintains a detailed and compliant record retention policy to ensure that records are kept for the required duration while adhering to regulatory and operational standards. By utilizing Yardi for efficient record-keeping and adhering to a structured record retention policy, National CORE ensures that all records are properly managed, securely stored, and disposed of according to regulatory standards. This system allows for the smooth operation of property management and ensures full compliance with legal and regulatory requirements.

10. Provide a description of the Firm's system for supervising ongoing maintenance, responding to tenant complaints, tracking and completing repairs, and whether repairs are conducted by Firm Staff or contracted out.

National CORE employs a comprehensive system for supervising ongoing maintenance, responding to tenant complaints, and tracking and completing repairs. This system is designed to ensure that maintenance tasks are addressed in a timely manner, tenant concerns are heard and resolved efficiently, and repairs are conducted with a high standard of quality.

Supervising Ongoing Maintenance:

National CORE's maintenance management system is integrated through Yardi property management software, which allows the firm to track and manage all maintenance requests, work orders, and service statuses. Maintenance tasks are typically initiated through tenant complaints or regular inspections conducted by on-site management. These requests are entered into the system, assigned to maintenance staff or contractors, and monitored through completion.

Responding to Tenant Complaints:

When a tenant submits a complaint or maintenance request, it is logged into the system immediately. The request is prioritized based on urgency, such as health and safety concerns or repair needs that could cause further damage if left unaddressed. Tenant complaints are typically addressed directly by on-site staff, and follow-up is done to ensure satisfaction once the issue is resolved.

Tracking and Completing Repairs:

All repairs are tracked from submission to completion through the Yardi system. This ensures that no request goes unanswered and that work orders are completed on time. Staff or contractors are assigned based on the type and scope of the repair

needed. Maintenance teams and property management staff are responsible for ensuring repairs meet quality standards and are completed promptly.

Repairs: Staff vs. Contracted Out:

Staff Repairs: For routine repairs and maintenance, National CORE utilizes in-house maintenance staff, including maintenance supervisors and technicians who are trained to handle a wide variety of repair and maintenance tasks. This allows for quicker response times and consistency in work quality.

Contracted Repairs: For specialized or larger-scale repairs, such as HVAC, plumbing, or electrical work, National CORE contracts with trusted, pre-approved service providers. These contractors are selected based on their experience, reputation, and ability to meet National CORE's standards for quality and responsiveness.

Response Time for Maintenance Requests: National CORE prioritizes quick response times to ensure tenant satisfaction and maintain the condition of properties. The typical response times are as follows:

1. Routine Maintenance Requests:

- Response Time: Within 24 hours of receiving the request.
- For non-emergency issues, routine maintenance tasks, such as minor repairs, appliance servicing, or cosmetic repairs, are acknowledged and addressed within one business day. More complex or time-consuming requests are scheduled based on availability.

2. Emergency Maintenance Requests:

- Response Time: Immediate or within 30 minutes for emergency issues such as plumbing leaks, electrical problems, or safety hazards.

3. Estimated Time to Turn a Rental Unit: (Normal Wear and Tear of Previous Tenant):

- Time to Complete: 3 to 5 Business Days
- When a rental unit becomes vacant, and the previous tenant's wear and tear is the primary concern, National CORE aims to complete the "turn" of the unit within 5 to 7 days. This includes cleaning, minor repairs, touch-ups, and ensuring the unit is ready for the next tenant. If more extensive repairs or upgrades are required, the timeline may be adjusted accordingly.

11. Describe the Firm's procedure to respond to 24-hour emergency calls and the amount of time it takes to respond to the call.

National CORE has a well-defined procedure for responding to 24-hour emergency calls to ensure that critical issues are addressed immediately and that tenant safety and property integrity are prioritized.

Procedure for Responding to 24-Hour Emergency Calls:

1. Call Reception:

Emergency calls are received by the on-site property management team or an after-hours emergency hotline that is monitored 24/7. Tenants are provided with clear instructions on how to reach the emergency response line at any time of day or night.

2. Call Assessment:

Upon receiving an emergency call, the on-site staff or designated emergency response personnel assess the situation based on the severity of the issue. Common emergency situations include:

- Water leaks or flooding.
- Fire, smoke, or gas odors.
- Electrical issues that pose a safety risk.
- Broken locks or security concerns.
- Major appliance malfunctions affecting tenant safety or health.

3. Dispatching Maintenance Staff or Contractors:

If the emergency requires immediate attention, the property management team dispatches on-site maintenance staff if available, or contacts an emergency maintenance contractor (e.g., plumber, electrician, HVAC technician). If the issue requires a more specialized skill set, trusted contractors are contacted directly.

4. Communication with the Tenant:

The tenant is informed of the expected response time and the actions being taken. Clear communication is maintained to provide updates, especially in situations where repairs may take longer than initially anticipated.

5. Follow-Up and Resolution:

Once the emergency situation is resolved, a follow-up is conducted to ensure that the issue was fully addressed and that no further complications remain. If necessary, additional repairs or preventive measures are scheduled to ensure the issue does not recur.

By having a streamlined process and ensuring quick action, National CORE prioritizes tenant safety and ensures that emergencies are handled promptly and efficiently. The team is available at all hours, and all emergency calls are responded to with the urgency they require to prevent further damage or risks to the property and tenants.

12. Describe how often property walks are conducted by the onsite manager. What are the Firm's procedures to maintaining records? Does the frequency of the property walks change depending on property size?

At National CORE, property walks are an integral part of the ongoing maintenance and management process. They help ensure that properties are maintained in optimal condition and that any issues or concerns are identified early. The frequency of these walks may vary depending on the specific needs of the property, but they are a standard practice for all managed properties.

Frequency of Property Walks:

1. On-Site Manager Property Walks:

- **Routine Walks:** On-site managers conduct property walks at least once per week to assess the overall condition of the property, including common areas, landscaping, exterior, and individual units as needed. These walks help identify potential maintenance issues, safety concerns, or compliance-related matters.
- **High-Traffic or Larger Properties:** For larger properties or those with higher tenant turnover, such as multi-building complexes, property walks may be conducted multiple times per week. This ensures that issues are caught early, and the property is being maintained at a high standard.
- **Smaller or Lower-Traffic Properties:** For smaller properties or those with fewer tenants, the on-site manager may conduct property walks on a bi-weekly or monthly basis, though this can vary depending on the specific property needs or resident concerns.

2. Special or Seasonal Walks:

- In addition to routine property walks, seasonal or specialized walks are conducted as needed, such as after storms to inspect for damage, or following tenant complaints about specific areas of concern.

Procedures for Maintaining Records:

1. Documenting Property Walks:

- **Yardi Property Management System:** All property walk findings, observations, and any subsequent actions are recorded in the Yardi property management software. This includes notes about the condition of common areas, specific units, and any maintenance requests generated during the walk.
- **Inspection Reports:** For each property walk, the on-site manager fills out a detailed inspection form that is stored in the system. These reports include notes on any issues found, along with photographs (if necessary) to document the condition of the property.
- **Work Orders:** If the walk uncovers any maintenance issues, a work order is created directly in Yardi. This allows the maintenance team to track repairs and ensure they are completed promptly.

2. Tracking Follow-Up Actions:

- **Follow-up Reporting:** If a maintenance issue or tenant concern arises during a property walk, follow-up actions are tracked and documented in the system. This includes assigning work orders to maintenance staff or contractors and ensuring that issues are resolved in a timely manner.
- **Ongoing Communication:** On-site managers communicate with regional managers and maintenance supervisors to discuss any recurring issues that need additional attention. This ensures that both minor and major concerns are addressed promptly.

Impact of Property Size on Walk Frequency:

- **Larger Properties:** Larger properties with multiple buildings or units generally require more frequent and thorough property walks. These properties may require more staff involvement for both routine and special walks to ensure all areas of the property are adequately covered.
- **Smaller Properties:** For smaller properties, property walks may be less frequent but still occur regularly to maintain the same standards of quality and tenant satisfaction. However, the focus may be on key areas of concern, such as fewer common areas or amenities.

National CORE's property walk procedures are integral to ensuring the property remains well-maintained, compliant with regulations, and responsive to tenant needs. The frequency of these walks may vary depending on the size of the property, but they are conducted routinely to maintain high standards. Records of these walks are carefully documented, tracked, and retained to ensure accountability and prompt follow-up on any identified issues. This approach helps ensure that all properties are managed effectively and remain in excellent condition for tenants.

13. Describe the Firm's experience, if any, intervening with one or more distressed occupied properties and managing the property before, during, and after rehabilitation. Include the unit count and occupancy status.

National CORE has extensive experience intervening with distressed occupied properties and managing the rehabilitation process from start to finish. This includes navigating the complexities of maintaining tenant relationships, coordinating renovations, and ensuring the property remains in good standing throughout the project. National CORE has successfully rehabilitated multiple properties while keeping tenants informed and minimizing disruptions to their living conditions.

Experience with Distressed Occupied Properties:

1. Pre-Rehabilitation:

- **Assessment and Planning:** Before beginning any rehabilitation, National CORE conducts a thorough assessment of the property's condition, identifying critical repair areas, safety concerns, and areas requiring modernization or compliance upgrades. A detailed rehabilitation plan is developed, outlining the scope of work, timelines, and necessary resources.
- **Tenant Communication:** Clear communication is key when managing occupied properties during rehabilitation. National CORE ensures that tenants are informed about the upcoming work, including the expected timeline, areas to be impacted, and the steps being taken to minimize disruption. We provide tenants with regular updates and work with them to address any concerns they may have during the process.
- **Temporary Relocation Plans:** In cases where rehabilitation would cause significant disruption to tenants (e.g., utility shutdowns or major repairs), National CORE works closely with tenants to find suitable temporary relocation options within the property or nearby. This is done to avoid

displacing tenants entirely, especially in properties with low-income or vulnerable residents.

2. During Rehabilitation:

- **Ongoing Maintenance and Tenant Services:** During rehabilitation, National CORE ensures that essential services remain operational, such as providing alternate routes for tenants to access their units, maintaining adequate lighting, and handling emergency maintenance requests. On-site managers and maintenance staff remain available to address tenant concerns promptly.
- **Coordinating the Work:** National CORE works closely with contractors, overseeing the progress of renovations, ensuring work is done to high standards, and adhering to timelines. In addition, we focus on minimizing tenant disruptions, with construction occurring in phases to ensure that affected areas are as limited as possible.
- **Tenant Support:** National CORE staff regularly check in with tenants, provide support services when necessary (such as arranging for temporary relocation or assistance with special needs), and ensure tenants' needs are being met.

3. Post-Rehabilitation:

- **Unit Inspections and Quality Assurance:** After rehabilitation is completed, each unit is thoroughly inspected to ensure the work was completed to code, meets National CORE's quality standards, and is safe for occupancy. Any remaining issues are addressed immediately, and units are made ready for re-occupancy.
- **Tenant Re-Entry and Satisfaction:** Once units are rehabbed, tenants are allowed to move back in. National CORE ensures that tenants are satisfied with the completed work, addressing any final concerns and ensuring the property is in a condition that meets or exceeds their expectations.
- **Ongoing Property Management:** Following the completion of the rehabilitation project, National CORE continues to manage the property by conducting regular property walks, ensuring that the newly rehabilitated units and common areas are maintained at high standards, and addressing any ongoing tenant concerns.

Specific Property Example:

One notable example includes National CORE's management of Sunset Heights, a distressed 150-unit property undergoing a large-scale rehabilitation. This property was significantly impacted by deferred maintenance, requiring both structural repairs and aesthetic upgrades to bring it up to code and improve living conditions for tenants. Throughout the rehabilitation, National CORE kept tenants informed, addressed their concerns, and worked with them on temporary relocation when

necessary. After rehabilitation, the occupancy rate increased due to the upgraded amenities and the enhanced quality of life for the tenants.

Unit Count and Occupancy Status:

- Unit Count: National CORE has managed and rehabilitated properties ranging from small complexes with 50 units to larger multifamily properties with over 300 units.
- Occupancy Status: In properties undergoing rehabilitation, occupancy status typically fluctuates. However, National CORE focuses on maintaining high occupancy rates by carefully managing the tenant experience during construction, offering relocation assistance when necessary, and ensuring that rehabilitation efforts lead to improved living conditions. For example, Sunset Heights maintained a steady occupancy rate of around 90% during its rehabilitation due to proactive tenant communication and relocation management.

14. Provide any experience with state relocation requirements with any property managed.

National CORE has significant experience managing properties that require adherence to state relocation requirements, particularly in cases where rehabilitation, redevelopment, or construction activities impact tenants. These requirements often involve specific procedures for tenant notification, assistance, and relocation, especially in situations where temporary displacement or relocation is necessary. National CORE has successfully navigated these requirements while ensuring compliance and minimizing disruption to residents.

Experience with State Relocation Requirements:

1. Understanding of State Relocation Laws:

- National CORE is well-versed in state relocation laws, including those that govern California's Relocation Assistance (such as the California Relocation Assistance Act and various local ordinances). These laws typically provide compensation and support to tenants who must temporarily or permanently relocate due to construction or rehabilitation activities that affect their living conditions.
- National CORE ensures that all required notices are provided to tenants in a timely manner, and all necessary documentation is completed to comply with the applicable state and local regulations.

2. Tenant Notification and Communication:

- **Early Notification:** One of National CORE's priorities when dealing with state relocation requirements is providing tenants with early and clear notification. Tenants are given written notice of any planned relocation, including the reasons for the move, the anticipated timeline, and the assistance they are eligible to receive.
- **Relocation Assistance:** National CORE ensures that tenants receive relocation assistance as required by state law, which may include financial assistance for moving costs, temporary housing arrangements, and other forms of support.
- **Ongoing Communication:** Throughout the relocation process, National CORE maintains open lines of communication with tenants, providing regular updates and addressing any concerns regarding the relocation process. This helps build trust and minimizes any potential confusion or frustration.

3. Temporary Relocation Planning and Support:

- **Relocation Logistics:** For tenants temporarily displaced due to rehabilitation or construction work, National CORE coordinates temporary housing solutions, either within the same property or in nearby locations. This ensures that tenants are not left without a home and helps prevent any undue hardship caused by the relocation process.
- **Moving Assistance:** Where required, National CORE provides moving assistance to tenants, including help with transporting belongings and ensuring that the move is smooth and efficient.
- **Coordination with Contractors:** National CORE works closely with contractors and vendors to ensure that relocation timelines align with the project schedule and that tenants are able to return to their units as soon as possible after the rehabilitation or construction work is completed.

4. Permanent Relocation (When Applicable):

- **If Permanent Relocation is Necessary:** In cases where permanent relocation is necessary, National CORE ensures that tenants are provided with the appropriate compensation as required by state law. This includes relocation payments, assistance with finding new housing, and additional support for tenants facing permanent displacement.
- **Compliance with Local Agencies:** National CORE works with local housing authorities and other relevant agencies to ensure that any permanent relocation efforts meet the standards set by state and local laws. This includes ensuring that tenants are offered fair treatment and that any required payments are made promptly.

5. Examples of State Relocation Experience:

- **Sunset Heights:** At Sunset Heights, a property undergoing extensive rehabilitation, National CORE successfully navigated state relocation requirements. During the renovation process, tenants were temporarily relocated within the property or to nearby buildings to minimize disruption. National CORE provided relocation assistance, including moving expenses and temporary housing, and ensured that all state-mandated notices were given in advance. The process was handled smoothly, with tenants returning to newly renovated units once the work was completed.
- **Heritage Place, Savannah GA:** During redevelopment at Heritage Place, National CORE assisted tenants in accordance with local and state relocation laws. Tenants were provided with relocation packages, moving assistance, and guidance on temporary housing options while their units were being rehabilitated. National CORE ensured that all relocation payments and notices were handled in compliance with state regulations, maintaining a high level of tenant satisfaction throughout the process.

6. Recordkeeping and Compliance:

- National CORE maintains meticulous records to document compliance with relocation requirements. This includes keeping copies of all notices sent to tenants, records of relocation payments, and documentation of tenant communications. These records are stored securely and are available for review by tenants, local authorities, or other stakeholders as needed.

15. Provide any experience with public bidding for 'Public Works' type projects including prevailing wage for recent work at any managed property.

National CORE has significant experience managing Public Works projects that require compliance with prevailing wage laws. From issuing competitive bids and overseeing contractor selection to ensuring accurate wage payments and proper documentation, National CORE is committed to maintaining the highest standards of compliance for all public projects. The firm's focus on transparency, fairness, and legal adherence ensures that all projects are completed successfully, with workers paid appropriately and contractors meeting all necessary regulatory obligations.

16. Has your Firm ever failed to accept a contract award or to complete a contract awarded to you? If yes, explain with details of the contract type, date, owner, and reason.

National CORE has never failed to accept a contract award or to complete a contract that was awarded to the firm. The organization has a strong track record of successfully managing and completing all awarded contracts, whether for property management, construction, rehabilitation, or capital improvements.

National CORE's commitment to professionalism and accountability ensures that all projects are completed on time, within budget, and in full compliance with contract terms. The firm follows a thorough review process before accepting any contract to ensure that it has the necessary resources, capabilities, and expertise to fulfill the obligations of the contract successfully.

In instances where unforeseen challenges arise, National CORE proactively communicates with the project owner or agency to address the situation and find a solution, ensuring that the project continues smoothly and successfully. National CORE takes pride in maintaining a reputation for reliability and excellence in contract execution.

17. Has your Firm ever surrendered a bid bond or a bid security? If yes, explain with details of the contract type, date, owner, and reason.

National CORE has never been required to surrender a bid bond or bid security for any project. The firm takes a thorough and careful approach when submitting bids to ensure that all necessary preparations and resources are in place to meet the contract requirements if awarded. This includes assessing the feasibility of the project, ensuring sufficient capacity and expertise, and committing to meeting all obligations outlined in the bid.

National CORE prides itself on its ability to honor contractual commitments and has maintained a strong reputation for reliability and successful project completion. Should any challenges arise, National CORE proactively communicates with all parties involved to resolve the issue and ensure that the project progresses without disruption. The firm's careful risk management practices help to ensure that bid bonds and securities are never called into question.

18. Has your Firm ever had a contract terminated? If yes, explain with details of the contract type, date, owner, and reason.

National CORE has not experienced any contract terminations. The firm maintains a strong commitment to fulfilling contractual obligations, ensuring that all projects are completed on time, within budget, and in full compliance with agreed-upon terms.

National CORE takes a proactive approach to project management, including thorough planning, regular communication with stakeholders, and prompt resolution of any issues that arise. This approach has allowed the firm to maintain long-term relationships with property owners, housing authorities, and other stakeholders, while delivering high-quality work across a wide range of projects.

If any challenges arise during the course of a project, National CORE works closely with the involved parties to address concerns and ensure that projects remain on track, avoiding the need for contract terminations.

19. Within the past two (2) years, has your Firm, or predecessor Firm, received an OSHA violation and/or non-compliance notice from any local municipality, state, or federal agency? If yes, describe the situation, the type of notice received, and were there any fines imposed.

National CORE, or its predecessor firm, has not received any OSHA violations or non-compliance notices from local municipalities, state, or federal agencies within the past two years. The firm is committed to maintaining a safe working environment for all employees, contractors, and tenants. This includes strict adherence to all Occupational Safety and Health Administration (OSHA) standards and regulations, as well as other applicable safety guidelines.

National CORE regularly conducts safety training, implements safety protocols, and performs site inspections to ensure full compliance with safety regulations on all projects. The firm also works closely with contractors and subcontractors to ensure that they maintain the highest standards of safety on job sites. Should any safety concerns arise, National CORE addresses them promptly to ensure a safe environment for everyone involved in the project.

Cost Proposal

Provide the following fee structures to fulfill the Services outlined in this RFP. The proposed fee structure shall be valid for the initial proposed five (5) year base agreement term. Include additional sheets if needed.

A. Management Fee

Management Fee calculation should be based off a flat fee rather than based on a percentage of the gross revenues of the Properties. Gross revenues can fluctuate with changes of tenant incomes and occupancies. Respondents are asked to propose a flat monthly management fee for the Properties.

1. Dollar Per Unit	\$ <u>\$70 per unit per month</u>
2. Other Fees (Use additional sheet if necessary):	\$ _____
Description	Cost
3. <u>N/A - please reference cost letter submitted in RFP.</u>	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____

B. Operational Costs

List the types of Operational Costs that will be paid from the Properties operations (i.e. staffing, benefits, overhead, etc). Include detail of what is included with the cost.

Description	Cost
1. <u>N/A - please reference cost letter submitted in RFP</u>	\$ _____
2. <u>covered by management fee</u>	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____

C. Other Costs

Describe other costs and estimates.

Description	Cost
1. <u>N/A - please reference cost letter submitted in RFP</u>	\$ _____
2. <u>covered by management fee</u>	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____

I certify the fees listed are applicable up to 180 days from Proposal submittal.

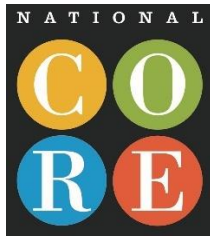
Courtney Richard
Signature of Authorized Representative

11/20/2024
Date

Courtney Richard
Printed Name

11/20/2024
Date

National Community Renaissance "National CORE"
Firm's Name



**“Service Approach” for the City of Palm Desert RFP 2024-RFP-142
Affordable Housing Compliance and Property Management Services**

Technical and Management Approach

Service Delivery Strategy

National CORE’s technical and management approach ensures efficient, effective, and compliant property management. Key components include:

1. Comprehensive Property Assessment:

- Initial property walkthroughs to assess maintenance needs.
- Digital documentation of property conditions for records and future planning.

2. Staff Training and Deployment:

- Hiring and training of skilled on-site management and maintenance staff.
- Ongoing education in compliance, tenant relations, and modern property technologies.

3. Technology Integration:

- Implementation of property management software for file management, work orders, compliance tracking, and reporting.
- Automated alerts for lease renewals, inspections, and tenant communications.

4. Stakeholder Engagement:

- Regular communication with property owners, tenants, and stakeholders.
- Transparent reporting on property performance and finances.

First-Year Schedule of Tasks, Milestones, and Deliverables

Month	Tasks	Milestones	Deliverables
1-2	Initial property assessment, onboarding	Completion of property audits	Audit reports, staff onboarding completion
3-4	Establish management procedures, training	Finalized management protocols	Operations manual, training certifications
5-6	Maintenance plan implementation	First round of preventative maintenance	Maintenance logs, quality assurance documentation
7-9	Compliance and quality control review	Mid-year compliance and QA audit	Review reports, corrective action plans (if needed)
10-12	Performance evaluation and adjustments	Annual review meeting with stakeholders	Performance reports, budget projections for year two

Management Plan

Maintenance Control

- Preventative Maintenance Program: Routine inspections and upkeep to prevent larger issues.
- Work Order System: Digital request and tracking system for maintenance.
- Vendor Management: Pre-qualified vendor pool for cost-effective and reliable service delivery.

Quality Assurance

- Routine Audits: Monthly file and compliance checks to ensure accuracy.
- Resident Feedback Surveys: Quarterly surveys to gather insights and address concerns.
- Inspection Protocols: Regular property and unit inspections to monitor conditions and safety.

Tenant Relations

- Clear Communication Channels: 24/7 accessibility for tenant concerns via email, phone, or app.
- Community Engagement Activities: Hosting events and programs to foster tenant relationships and satisfaction.
- Resident Resource Programs: Linking tenants to local services (e.g., job training, health care).

Additional Proposed Tasks

National CORE recommends including:

- Resident Services Programs: Structured plans for educational, vocational, and health services.
- Emergency Response Plan: Clear protocols for handling emergencies such as natural disasters or urgent repairs.

Proposed Method

- Develop resident services partnerships with local agencies.
- Conduct drills and training for emergency preparedness.



National Community Renaissance

A Trusted Property Management Partner

Together, We Transform Lives and Communities

National CORE is one of the nation's largest nonprofit developers and managers of affordable rental housing. As a "best in class" provider of property management services, National CORE offers an array of in-house capabilities to navigate the complexities of managing affordable multifamily housing.

Because Where You Live Matters

At National CORE, we believe that people and place matter. High-quality management and a long-term focus are keys to preserving the integrity of our communities and creating a place residents are proud to call home.

National CORE manages more than 8,000 affordable and market rate rental units in 100 developments nationwide in conjunction with private and public entities. With more than 30 years of experience in property management, National CORE offers a fully integrated approach that includes professionals in human resources, finance, asset management, compliance, risk management, energy and sustainability, and capital improvements.

Managing from an Owner's Perspective

High Performing Communities

To maximize net income at the properties it manages, National CORE's Senior VP of Property Management conducts:

- Detailed budget development and review processes
- Monthly financial reviews with regional managers
- Quarterly in-depth reviews with CFO, controller, asset managers, and regional managers
- Ongoing monitoring and analysis by financial analyst to maximize property performance

Surpassing Industry Standards on All Key Performance Indicators

- Economic occupancy of 98 percent or better portfolio-wide
- Aged receivables less than one percent
- Bad debt less than one percent of Gross Potential Rent
- Improved performance ratings using the AHIC model
- Water conservation efforts yielded a 65 percent decrease in water usage in one year
- 2016 recipient of the Inland Empire H₂O Hero of the Year Award
- Converted entire portfolio to smoke-free in 2016





Integrated Team of Professionals



Accounting

Our Accounting Team watches over the financial solvency of our properties in order to maximize income, minimize bad debt, and maximize cash distribution to owners.

- Financial and operations auditing
- Financial reporting
- Cost containment analyses
- Strategic planning and benchmarking
- Yardi Voyager, web-based property management software and asset management solutions



Asset Management

Comprehensive asset management planning, financial reviews, onsite physical and staff evaluations, debt restructuring/re-syndication, review of agency requirements and documentation plus constant communication.

- Responsible for the preservation of the physical assets
- Submit monthly, quarterly, semi-annual and annual reports
- Supervise disbursements
- Develop property watch list for under-performing properties



Capital Improvements

Preserves the integrity of the physical platform while introducing modern touches to keep the property current and efficient.

- Interior and exterior maintenance
- Skilled maintenance staff
- Cost containment analyses
- HandyTrac Key Management System
- Focus on leasing units with minimal turn time, maximizing economic occupancy



Compliance

Maintains a service-oriented approach designed to assist owners and agents in complying with the many complex federal and state housing regulations.

- Full regulatory compliance
- Compliance certification and recertification
- Measure and evaluate site level staff
- Monitor file turnaround times
- Identify training opportunities
- Custom compliance property checklist based on the funding sources and specific compliance requirements
- Compliance monitoring audits



Energy and Sustainability

“Doing Our Part” to develop sustainable communities and implement conservation programs that maintain the health and stability of our communities.

- Turf removal and smart irrigation
- Installation of high efficiency toilets, shower heads and flow restrictors
- Installation of high efficiency front load washers
- Installation of demand control devices
- Installation of Wi-Fi controlled thermostats
- LED lighting upgrades
- Utility data tracking with WegoWise



Human Resources

We offer a full service HR team to provide employee relations and operational support.

- Recruitment, hiring and retention
- Compensation and benefits
- Payroll and HR systems
- Employee relations
- Performance management
- Training and development
- Safety management



Property Management

Experts in resident service programs, facilities management, maintenance, leasing, and compliance with affordable housing regulations allows owners and agents to place their trust in our services and achieve the highest level of resident satisfaction.

- Planning and budgeting
- Market evaluation
- Advertising, marketing and lease-up
- Resident screening
- Lease renewal negotiations
- Rent and maintenance collection
- Supervision of personnel
- Owner/resident relations
- Residential relocation



Risk Management

Identifies, assesses and controls threats to capital and earnings.

- Oversees contract negotiations
- Conducts vendor and contract screenings
- Mitigates safety and environmental issues
- Annual property inspections

NATIONAL CORE DOING Our Part



CREATING SUSTAINABLE COMMUNITIES:

Leverage rebate programs to increase efficiencies and energy sustainability



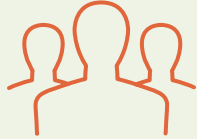
PROTECTING LONG-TERM VIABILITY OF ASSET:

Maximize rents and performance



GREAT CUSTOMER SERVICE:

Reliable, proactive, personal touch



INTEGRATED TEAM OF PROFESSIONALS:

Accounting, Asset Management, Capital Improvements, Compliance, Energy and Sustainability, Human Resources, Property Management, and Risk Management



GOOD FISCAL AGENT:

Monthly budget and financial reviews

Staff Training and Development

- Maintenance staff participate in quarterly trainings (including two hours of safety training by IMA Risk Management) to reduce work related injuries, increase core competencies and build strong teams
- Property management staff has monthly trainings ranging from fair housing and California Certified Residential Manager certification to customer service and rental application processing
- Compliance team undergoes extensive training and are certified tax credit specialists
- All managers at tax credit properties are tax credit certified utilizing National Center for Housing Management trainers

Best in Class Property Management

- Dedicated staff committed to exceeding the needs of residents
- Commitment to maximizing rents and performance through monthly operation reviews
- Regular communication with all stakeholders
- Experts in landlord/tenant laws and fair housing regulations
- As owners of 95+ properties, we know how to manage from an owner's perspective

"Each National CORE project I've seen not only brought value to the residents of these communities but has increased the value of the surrounding neighborhoods."

~ **Acquanetta Warren**
Mayor, City of Fontana

"Through collaboration and commitment with the City of San Marcos and other agencies, National CORE has completely transformed neighborhoods from the brink of ruin to flourishing communities."

~ **Beth Nielson**
Housing Programs Specialist,
City of San Marcos

"The property management team has proven themselves time after time in providing the best outcomes for residents, investors, lenders, and the local community."

~ **Blake Davis**
Vice President,
Acquisitions/Underwriting
Hudson Housing Capital



phone 909-483-2444
www.NationalCORE.org