



Unlocking Homekey Conference

Rehabilitation, Remediation & Renovation for Homekey Projects in California





Lihbin Shiao, Principal

Experience

Lihbin is the Principal and founder of Mosaic. Lihbin has 22 years of professional real estate development experience, managing challenging projects with complex financing and ownership structures. She has been working in the field of community development for 30 years. Lihbin has provided development project management and financial consulting services for the development and rehabilitation of over 12,000 units of family, senior, and special needs housing and mixed-use development throughout California. Prior to founding Mosaic, she worked in a range of positions in community based, housing policy and development organizations including the Chinese Progressive Association, the East Bay Asian Local Development Corporation, PolicyLink, and BRIDGE Housing.

PROFESSIONAL DATA

Brown University – Bachelor of Arts

UC Berkeley DCRP – Masters in City & Regional Planning

EMAIL: lishiao@mosaicurban.org

Moderator

Lihbin Shiao, Mosaic Urban Development, Principal

Panelists

Rachel VanderVeen, City of San Jose – Housing Department, Assistant Director

Raymond McQuillen, Kashia Band of Pomo Indians of Stewarts Point Rancheria,
Housing Authority Housing Director

Jocelyn Lin, Burbank Housing, Director of Housing Development

David Schnur, Mosaic Urban Development, Development Director
Considerations for Supportive Housing Rehabilitation

Presentation Outline

- Homekey Program
 - History/Context
 - Evolution of the Program
- Three projects
 - Surestay Homekey 1.0, Interim to Permanent – Urban
 - Burbank Homekey 2.0, 3 Homekey Projects – Rural
- Summary of some best practices

City of San Jose

SURESTAY HOTEL AND CITY OF SAN JOSE HOMEKEY

Rachel VanderVeen

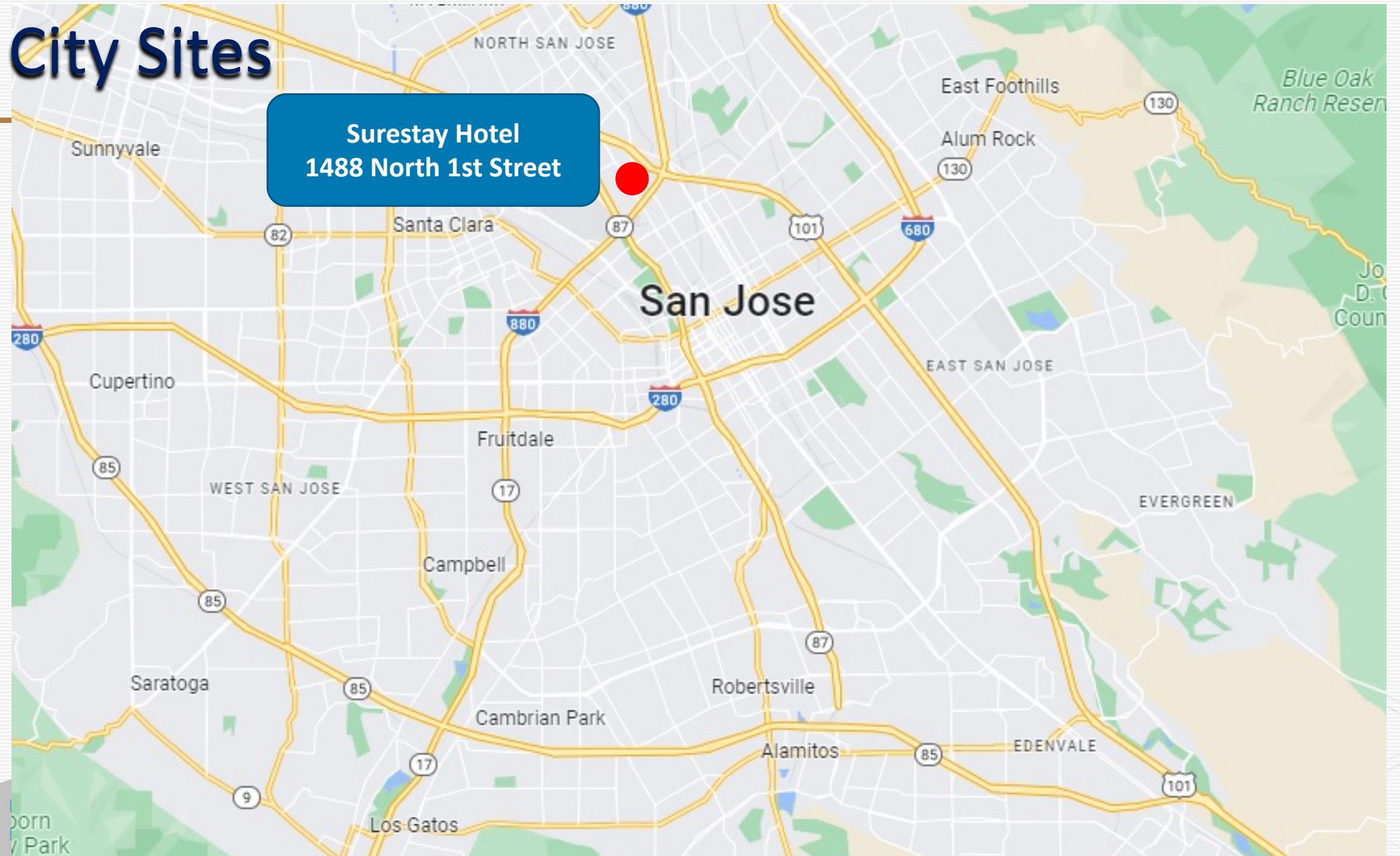
Assistant Director, City of San Jose Housing Department

APRIL 28, 2023



City Sites

Surestay Hotel
1488 North 1st Street



Surestay Hotel (1488 North First Street)



- 🏠 1.5 acres (65,981 SQ FT)
- 🏠 Hotel building acquired with Homekey funds
- 🏠 Property includes 76 hotel rooms, a community room and a detached two-bedroom manager's unit



SureStay Hotel – Housing Authority and Jamboree

- Owner: Santa Clara County Housing Authority
- Developer: Jamboree
- Property Management and Resident Services: Jamboree
- Authorize a contract with LifeMoves for bridge services



SureStay Hotel – Permanent Phase



City of San Jose – Lessons Learned

- Development partners are essential
- A hotel is not designed and built for people to live in - required rehabilitation is more significant
- Homekey requires a large investment of executive management in a way that other projects do not, because there is no template





BURBANK HOUSING & HOMEKEY PROJECTS

**JOCELYN LIN
DIRECTOR OF HOUSING DEVELOPMENT**

APRIL 28, 2023



WHO WE ARE

A non-profit affordable housing organization operating since 1980, we've built welcoming, comfortable communities for people to call home. Today, we enjoy a successful track record as a leader in the creation and management of quality, sustainable, affordable housing throughout Sonoma & Napa counties.

WHO WE SERVE



103

COMMUNITIES

691

PIPELINE PROJECT UNITS

1,000

HOMES BUILT

3,220

RENTAL UNITS

Serving Over
8,700

RESIDENTS



HOMEKEY PROJECTS AT A GLANCE



Burbank Housing Homekey Portfolio

Project:	Kashia Homekey
Project Team:	Kashia Band of Pomo Indians, Burbank Housing
Location:	Santa Rosa, Sonoma County
# of Units:	20
Target Populations Served:	Homeless, Chronically homeless
Building Type:	Motel Acquisition & Rehab
Type	Permanent
Homekey	\$2,550,000
Other Sources:	ICDBG Enterprise CDBG-CV
Total Cost Per Unit:	\$310,271





Burbank Housing Homekey Portfolio



Project:	Adrian Court
Project Team:	County of Napa, Burbank Housing, Abode Services
Location:	Napa, Napa County
# of Units:	8
Target Populations Served:	Homeless, Chronically homeless
Building Type:	Multifamily Complex Acquisition & Rehab
Occupancy Type:	Permanent
Total Homekey Award:	\$2,100,00
Other Sources:	CDBG-CV Providence Queen of the Valley Enterprise
Total Cost Per Unit:	\$319,096



**Burbank Housing
Homekey Portfolio**

Project:	Valley Lodge Apartments
Project Team:	City of Napa, Burbank Housing, Abode Services, VOICES
Location:	Napa, Napa County
# of Units:	55
Target Populations Served:	Homeless, Chronically homeless, Homeless youth
Building Type:	Motel Acquisition & Rehab
Occupancy Type:	Permanent
Total Homekey Award:	\$17,573,600
Other Sources	City of Napa County of Napa CDBG-DR Providence Queen of the Valley Wells Fargo
Total Cost Per Unit:	\$443,886



**BURBANK
HOUSING**



Project:	Studios at Montero
Project Team:	Burbank Housing, City of Petaluma, COTS
Location:	Petaluma, Sonoma County
# of Units:	60
Target Populations Served:	Homeless, Chronically homeless
Building Type:	Motel Acquisition & Rehab
Occupancy Type:	Permanent
Total Homekey Award:	\$15,080,382
Other Sources:	City of Petaluma Providence Wells Fargo
Total Cost Per Unit:	\$262,776



Burbank Housing Homekey Portfolio



Project:	L&M Village
Project Team:	City of Healdsburg, Reach for Home, Burbank Housing
Location:	Healdsburg, Sonoma County
# of Units:	22
Target Populations Served:	Homeless, Chronically homeless
Building Type:	Hotel
Occupancy Type:	Interim
Total Homekey Award:	\$7,048,800
Other Sources:	County of Sonoma
Total Cost Per Unit:	\$242,857



Impact

Over 170 individuals housed by Burbank's Homekey Projects



A robust partnership with service providers to support resident empowerment

Lives touched through permanent supportive housing pay positive dividends to the entire community



Challenges

- Tight timelines to complete projects
- Building permit delays
- Scope of rehab work is always more than anticipated
- Rising construction costs

David Schnur

Mosaic Urban Development

Scoping & Managing Homekey Rehabs

Determining the Rehab Scope

- Understand tenant needs
- Understand operational needs
- Understand the existing building

Involve the GC or Construction Manager in Scoping

- Feasibility/Constructability review
- Cost estimates
- Informed value engineering



▶ Best Practices for Managing the Team

- Clear lines of communication & decision-making
- Recurring standing meetings
- Understand what is in your plans or design/build
- Tools for managing your contractor
 - Progress review
 - Budgetary management
 - Schedule management
- Industry Standard documents

Handling Construction Changes

- Changes result from:
 - Unforeseen Conditions
 - Errors & Omissions
 - Permit Inspections
 - Owner Inspections
- Multistage Process: RFI/ASI, COR, CO
- Evaluating CORs

Prime Contract Change Order Request #074: RFI 399 Entry Closet Shaft				
TO:		FROM:		3
CHANGE ORDER REQUEST NUMBER / REVISION:	074 / 0	PRIME CONTRACT CHANGE ORDER:	None	
STATUS:	Pending - In Review	CREATED BY:	Chris Brown (Nibbi Bros. Associates Inc.)	
SCHEDULE IMPACT:	0 days	DATE CREATED:	2 /19/2020	
RESPONSE DUE BY:		TOTAL AMOUNT:	\$2,482.79	
CHANGE ORDER REQUEST TITLE: RFI 399 Entry Closet Shaft				
CHANGE ORDER REQUEST DESCRIPTION: CE #266 - NCD_SubkCO#29_RFI#399_Unit_116_Entry_Closet_Shaft_Wall Per RFI 399, demo closet opening framing, frame shaft wall around HVAC in unit 116, and frame smaller closet door opening.				
ATTACHMENTS: RFI 399 Unit 116 Entry Closet Shaft Wall - AMA Response.pdf CE #266_NCD_SubkCO#29_RFI#399_Unit_116_Entry_Closet_Shaft_Wall.pdf				
POTENTIAL CHANGE ORDERS IN THIS CHANGE ORDER REQUEST:				
PCO #	Contract Company	Title	Schedule Impact	Amount
074	Bridge Housing	RFI 399 Entry Closet Shaft	0 days	\$2,482.79
			Total:	\$2,482.79
CHANGE ORDER REQUEST LINE ITEMS:				
PCO: 074				
#	Description	Type	Amount	
1	CE #266_NCD_SubkCO#29_RFI#399_Unit_116_Entry_Closet_Shaft_Wall	S	\$2,315.00	
			Subtotal:	\$2,315.00
			Nibbi/Guzman Overhead & Profit: 4.00%	\$92.60
			Nibbi/Guzman Off-site Insurance: 0.64%	\$14.82
			City of San Francisco Tax: 0.92%	\$22.29
			Subguard: 0.90%	\$20.84
			Procure Fee: 0.01%	\$0.23

Application for Payment

CONTINUATION SHEET

APPLICATION AND CERTIFICATION FOR PAYMENT

A	B
DIVISION NO.	DESCRIPTION OF WORK
02 00 00	EXISTING CONDITIONS
02 30 00	Site Security
02 41 00	Demolition, Site Clearing & Grading
02 41 00	Site 3: Demolition, Site Clearing
02 50 00	Site Clean-Up
02 50 00	Site 3: Site Clean-Up
02 60 00	Survey
02 60 00	Site 3: Survey
03 00 00	CONCRETE
03 31 00	Structural Concrete
03 31 00	Site 1 & 2 Parking Costs: Structural Concrete
03 31 05	Concrete Reinforcement
03 31 05	Site 1 & 2 Parking Costs: Concrete Reinforcement
03 54 13	Gypcrete
04 00 00	MASONRY
04 10 00	Masonry Units
04 20 00	CMU
04 25 00	Masonry Veneer
05 00 00	METALS
05 12 00	Structural Steel Frame
05 51 00	Exterior Metal Stairs/Railings

APPLICATION AND CERTIFICATE FOR PAYMENT

TO (Owner):
WAC, L.P.
 c/o Meta Housing Corporation
 11150 W. Olympic Blvd, Suite 620
 Los Angeles, CA. 90064

APPLICATION NO: 13
 PERIOD FROM: 12/1/22
 TO: 12/31/22

Distribution to:
 Owner
 Architect

GENERAL CONTRACTOR:
RAAM Construction, Inc.
 140 S. Lake Avenue, Suite 217
 Pasadena, CA 91101

PROJECT TITLE:
Washington Arts Collective
 4600, 4601, 4607 & 4613 W. Washington Blvd.
 & 1915 Vineyard Avenue
 Los Angeles, CA. 90016

ARCHITECT:
Y&M Architects
 724 S. Spring Street, Suite 304
 Los Angeles, CA. 90014

CONTRACT DATE: September 3, 2021

CONTRACTOR'S APPLICATION FOR PAYMENT

CHANGE ORDER SUMMARY		
	ADDITIONS	DEDUCTIONS
Prior C.O. (\$) Total:	1,188,978.66	
List Change Orders approved this pay period	-	
TOTAL:	1,188,978.66	
Net Change by change orders		

The undersigned Contractor certifies that to the best of his knowledge, information and belief, the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by him for Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that the current payment shown herein is new due.

By: _____ Date: _____
 CONTRACTOR

Application is made for Payment, as shown below, in connection with the Account Status as of this Application:

ORIGINAL CONTRACT SUM.....	\$ 24,997,480.06
NET CHANGE BY CHANGE ORDERS.....	\$ 1,188,978.66
NET CONTRACT SUM TO DATE.....	\$ 26,186,458.72
TOTAL COMPLETED & STORED TO DATE.....	\$ 9,457,846.78
RETAINAGE.....	\$ 945,784.68
TOTAL EARNED LESS RETAINAGE.....	\$ 8,512,062.10

LESS PERVIOUS CERTIFICATES FOR PAYMENT..... \$ 7,288,118.58
 CURRENT PAYMENT DUE..... \$ 1,223,943.53
BALANCE TO FINISH, INCLUDING RETAINAGE..... \$ 17,674,396.62

By: _____ Date: _____
 WAC, L.P.

ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the data comprising the above application, the Architect certifies to the Owner that to the best of their knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the amount certified.

AMOUNT CERTIFIED \$ 1,223,943.53

By: _____ Date: _____
 Matthew Wickersham
 AMJ Construction

By: _____ Date: _____

Los Angeles County Development Authority

APPLICATION NO: 10
 APPLICATION DATE:
 PERIOD TO: 9/30/22
 PROJECT NO: 21-1018
 PROJECT NAME: Washington Arts Collective

	H	I	
	% (G/C)	BALANCE TO FINISH (C-G)	RETAINAGE
6	28.02%	97,174.54	3,782.55
0	91.35%	9,000.00	9,500.00
-		58,000.00	-
0	55.00%	18,000.00	2,200.00
0		10,000.00	-
0	82.50%	7,000.00	3,300.00
-		8,000.00	-
-			-
0	65.12%	482,150.00	90,000.00
0	85.50%	59,850.00	35,300.00
0	79.21%	112,850.00	43,000.00
0	98.67%	2,150.00	16,000.00
-		147,000.00	-
-			-
0	100.00%	-	68,000.00
0	16.26%	103,000.00	2,000.00
-		-	-
-		-	-
0	32.35%	161,000.00	7,700.00
0	4.45%	537,000.00	3,500.00

Mechanics Liens and Lien Waivers

- What is a mechanics lien?
 - Form of security interest, recorded with local county over property
- What is a Preliminary Lien Notice
- What is a Lien Waiver?
- Types of Lien Waivers
 - Conditional
 - Unconditional
 - Final
- Best practices for the management of liens

UNCONDITIONAL WAIVER AND RELEASE ON PROGRESS PAYMENT

NOTICE TO CLAIMANT: THIS DOCUMENT WAIVES AND RELEASES LIEN, STOP PAYMENT NOTICE, AND PAYMENT BOND RIGHTS UNCONDITIONALLY AND STATES THAT YOU HAVE BEEN PAID FOR GIVING UP THOSE RIGHTS. THIS DOCUMENT IS ENFORCEABLE AGAINST YOU IF YOU SIGN IT, EVEN IF YOU HAVE NOT BEEN PAID. IF YOU HAVE NOT BEEN PAID, USE A CONDITIONAL WAIVER AND RELEASE FORM.

Identifying Information

Name of Claimant: RAAM Construction, Inc.

Name of Customer: WAC, L.P.

Job Location: 4600,460, 4607 & 4613 W Washington Blvd. & 1915 Vineyard Ave. Los Angeles, CA 90016

Owner: WAC, L.P.

Through Date: 07/31/2022

Construction Completion or Building Permit Sign off

RECORDING REQUESTED BY
HOUSING ASSOCIATES, L.P.

WHEN RECORDED MAIL TO

San Francisco, CA 94108



City and County of San Francisco
Joaquin Torres, Assessor-Recorder

Doc # **2021090317** Fees \$26.00
 6/3/2021 11:31:15 AM Taxes \$0.00
 YY Electronic Other \$0.00
 Pages 5 Title 015 SB2 Fees \$75.00
 Customer 2001 Paid \$101.00

3554-005

SPACE ABOVE THIS LINE FOR RECORDER'S USE

Notice of Completion

NOTICE IS HEREBY GIVEN THAT:

- The name of the owner of the interest stated below in the property described below is Housing Associates, L.P.;
- The NAME, ADDRESS and NATURE OF INTEREST of every person owning any interest or estate in the property described below (including the above owner) is as follows:

FULL NAME	FULL ADDRESS	NATURE OF INTEREST
	San Francisco, CA 94108	Fee

- The names and addresses of the transferors to the above owner are (only to be shown if the owner is a successor in interest of the owner who caused the improvement to be constructed, altered, or repaired.)

- A work of improvement on the property described below was COMPLETED on May 25, 2021;
- The work of improvement completed is (or materials furnished are) described as follows: new construction of a 157-unit affordable, family housing apartment building.
- The name of the DIRECT CONTRACTOR, if any, for the work of improvement was :
(If no Contractor, insert "NONE.") _____
- The name and address of the CONSTRUCTION LENDER, if any, is: Wells Fargo Bank, N.A., 333 Market Street 17th Floor, San Francisco, CA 94105
(If no Construction Lender, insert "NONE.") _____
- The property on which the work of improvement was completed is in the City of San Francisco; County of San Francisco, State of California, and is described as follows:
See "Exhibit A" attached hereto and made a part hereof.
- The street address of said property is et, San Francisco, CA 94103.

Initials

Initials

JA



Q & A





Thank you for joining us!

