

December 2022

San Juan Community Home Trust

Community Preservation through Forever Affordable Housing



Response to:

San Juan County Department of Health & Community Services

Request for Qualifications

Argyle Affordable Rental Housing

(TPNs 351391424000-7000)

Issued October 2022



San Juan Community Home Trust

*Community Preservation Through
Forever Affordable Homes*

A Federal 501(c)(3) Nonprofit Organization

December 1, 2022

San Juan County Health & Community Services
Attn: Ryan Page, Affordable Housing Coordinator
P.O. Box 607
145 Rhone Street
Friday Harbor, WA 98250

Re: October 2022 Request for Qualifications · Argyle Affordable Rental Housing

Dear Mr. Page,

On behalf of the Board of Directors of the San Juan Community Home Trust, it is our pleasure to provide you with this response to the Request for Qualifications for affordable rental housing on the corner of Argyle Avenue and Malcom Street in the Town of Friday Harbor.

The Home Trust is a strong local non-profit, wholly dedicated to developing and managing permanently affordable housing for low- and moderate-income residents and known for understanding and creatively responding to the community and local conditions. As will be seen in the following materials, we have assembled Team Argyle! that is uniquely qualified and has the experience and expertise to ensure that the development of the Argyle Avenue site meets the goals of San Juan County and the Town of Friday Harbor.

We understand that the County wishes to partner with a developer to create permanent affordable rental housing that maintains the character of the historic neighborhood while maximizing allowable density of housing units. We further understand that upon approval by the County Council, the preferred developer(s) and the County will enter into an Exclusive Negotiating Agreement (ENA) to negotiate a Developer Agreement.

In closing, we appreciate your consideration of our qualifications to work with you on this unique and necessary endeavor and we look forward to partnering with the County to achieve these community goals. Should you have any questions regarding our proposal or require more information, please contact us.

Sincerely,

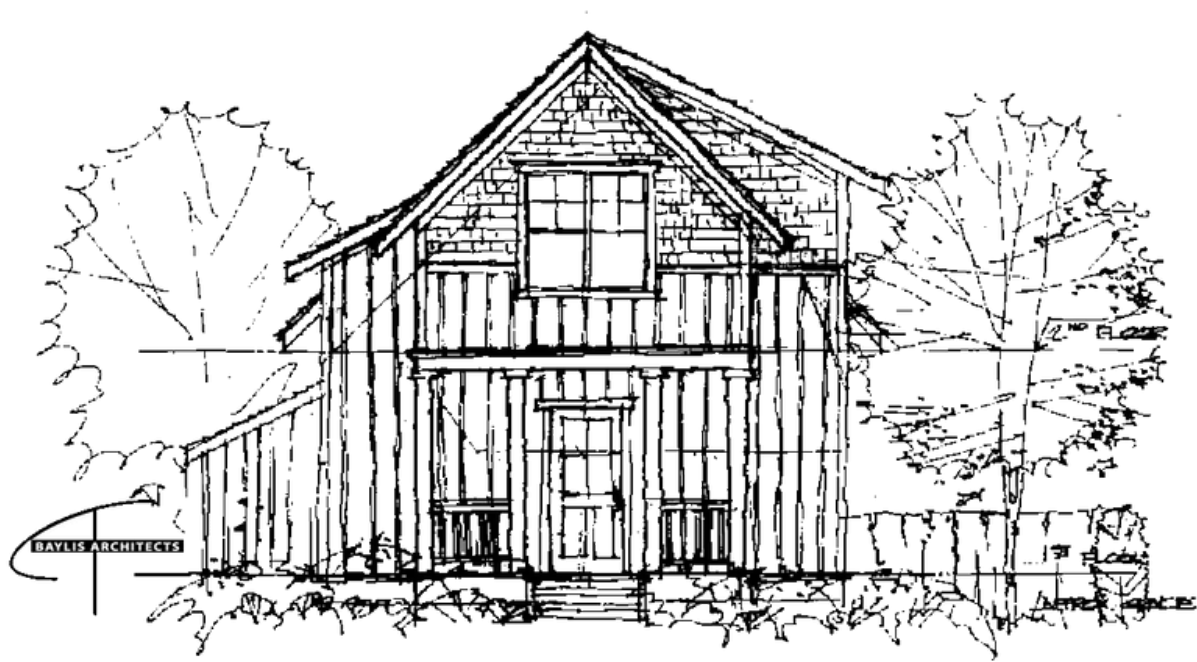
James Goetz, Board President
jim@divotworks.com
(360) 378-3811

Amanda Lynn, Executive Director
Amanda@hometruster.org
(360) 378-5541

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Capability of Development Team

Overview of San Juan Community Home Trust

The vision of founders Larry Soll, Lee Sturdivant and Jim Lawrence, and with the input of many concerned islanders, the [San Juan Community Home Trust](#) was founded in 2001 for the purpose of creating permanently affordable housing for low- and moderate-income residents, promoting economic diversity and development, and supporting a sustainable island community while practicing responsible stewardship of the rural environment. Our mission,

“Community preservation through forever affordable housing”

expresses our commitment to keep San Juan Island a vibrant and diverse community, where people of all ages and income levels can thrive.

In the years since being founded, the Home Trust has built [forty-one affordable homes](#) on three San Juan Island properties, with eight more units under construction, and another property currently in early planning stages and likely to add twelve more units to the island’s inventory. Our portfolio includes only low- and moderate-income permanently affordable housing with an emphasis on long term affordable home operation and a maintenance - sustainability. Our full team, Team Argyle!, adds to our proven track record decades of experience and expertise in designing, developing, and managing affordable housing including rental solutions, historic properties, urban architecture, and projects at or above the scale proposed.

While thus far the Home Trust has developed under the Community Land Trust model, offering homeownership, the offering of rental housing is consistent in many ways. As with the Argyle property, ownership of the land is separated from cost of housing. Income qualification and income verification is already fully incorporated into the processes and selection of our residents. Because of our property ownership, and our mission, resident coaching and assistance, and property management are also an integral part of what we already do. The rental housing solution makes the financing and management slightly different, but we are confident in our ability to adapt. And importantly, adapting our profile to rental housing, and rental housing as another avenue of service, are already part of our adopted strategic plan.

The San Juan Community Home Trust is a State of Washington 501(c)3 nonprofit corporation with a thirteen-member Board of Directors, a full-time executive director, three additional employees, and forty-seven volunteers. During COVID, we retained our employees as well as consistency in revenues and expenses and saw an increase in total assets. In 2021, we had an [audited](#) annual revenue just under \$1.3 million and more than \$3.8 million in net assets. We follow an adopted [strategic plan](#), we publish an [annual report](#), and offer [membership](#). Our 2019 Form 990 can be seen and downloaded [here](#).

Our funding comes from government sources at the national, state and local levels; from the sale of completed homes to participating families; lease & program fees; and from local philanthropic giving.

Team Argyle!

Since being founded twenty years ago, the San Juan Community Home Trust has provided on San Juan Island forty-one affordable homes to sixty-one low-and moderate-income earning families demonstrating their understanding of the community and the need for decent sustainable housing for working and fixed income residents. Being a local provider, the Trust understands and the unique circumstances of the island and has demonstrated the capacity to creatively provide stable affordable housing in San Juan County.



The San Juan Community Home Trust Board of Directors bring not only interest, background, and leadership in affordable housing, but also expertise in planning, design, development, and construction, sustainability and environmental stewardship, and financial planning and fundraising. The Board's membership includes community leaders, everyday citizens, and residents of the Trust's completed affordable neighborhoods. Following please find a list of the current [Board Members](#).

[Amanda Lynn](#) has led the Home Trust as Executive Director since 2021 and has developed strong relationships in the community and with the local housing providers of San Juan County. Her biography ([follows](#)) shows that she has education and experience with affordable housing across the housing spectrum as well as in State and local economics, policy, and community leadership. She is currently leading the development of the Home Trust's HolliWalk neighborhood, as well as stewarding their existing neighborhoods.

For this project, the Home Trust add to its staff [Karl Eberhard](#) to serve as the Owner's Representative and Development Director. His background ([biography follows](#)) includes decades of planning, design, and development of affordable housing as an architect, serving on the boards of several affordable housing providers, and as a municipal employee. His

background in downtown management and historic preservation will contribute greatly to achieving the County's goals for this property.

In addition to the Board and staff of the San Juan Community Home Trust, Team Argyle! includes additional consultant expertise. The conceptual planning and character vignettes have been provided by the project architect, [Environmental Works](#) ([firm profile follows](#)), a 501(c)3 non-profit community-based architectural firm. The firm's rich experience includes socially and environmentally sustainable design, work at the scale of the Argyle project, and affordable housing in San Juan County.

Also contributing to the information provided in this proposal, additional resources of the team include other professionals such as surveyors, environmental specialists, engineers, construction and cost professionals, and property management professionals (biographies and firm profiles in [Appendix A](#)). This team contemplates the needs from concept project and financial planning through management of the completed neighborhood.



Notably, the technical Team Argyle! described above is not complete and would not achieve important community and Home Trust goals without including stakeholders and partners in the broader team. It is the Home Trust's vision that the broader team includes everyone willing to be heard and to participate.

The issuance of this RFQ establishes San Juan County staff and elected officials as stakeholders and partners, but the government sector team members would include the staff and elected officials of the Town of Friday Harbor, and the alphabet soup of State and Federal agencies that provide incentives, loans, grants, and other programs that can be called upon to support this endeavor.

For success, to arrive at consensus on the community's vision, the team also needs to include the broader island community to address community concerns, build trust, and develop a shared vision for the future of this infill site. The property's neighbors and the Town of Friday Harbor's Historic Preservation Review Board will be members of the successful team. And, as with the Home Trust's Board, the "customers", future residents, are important team members.

Oft overlooked, from the private sector we look for participation from business leaders, employers, lenders, private developers, and the real estate industry. There is a role for the San Juan County Economic Development Council to further their Trades Training Initiative through partnership on this project. With our existing relationships, other non-profit affordable housing providers and other non-profit agencies are already established as partners ready to contribute.

Team Qualifications

San Juan Community Home Trust Board of Directors

Robert Anderson

Lisa Bennett

Sarah Benson

Elliot Burch

Chary Caren

Nickie Davis

James G. (Jim) Goetz - President

Erica Hamlin

Rob Littauer

Darcie Nielsen

Chris Pope

Chinmayo Ricketts

Claude Werffeli



Amanda Lynn

<https://www.amandalynn.info>

(360) 556-1410 

amanda@hometrust.org 

Friday Harbor, Washington 

[Linkedin/amandalynninfo](https://www.linkedin.com/in/amandalynninfo) 

EDUCATION

Bachelor of Arts: June 2021
Public Policy | Digital
Communication
The Evergreen State College
Olympia, Washington
2017-2021

High School Diploma
The Grier School
Tyrone, Pennsylvania
2004-2007
*Attended on a full merit-based
scholarship.*

RECENT COMMUNITY SERVICE

Community Organizer
Elevate Mason County
Founding leader for
Elevate's Immigrant
Worker Relief Fund,
founded in March 2020,
which organizes mutual aid
efforts to provide COVID
relief (\$90,000+ to date)
for Immigrants and
Refugee neighbors in rural
Mason County WA,
especially those left out of
government aid.
Successfully wrote & led
grant project for \$75,000
through the Seattle
Foundation.
Developed & lead fiscal
partnerships, assisted with
web design work, &
planned/facilitated
community meetings.

PROFESSIONAL SUMMARY

Experienced professional with knowledge around addressing homelessness, housing policy, and sustainable community development. Focused on building a housing landscape that provides social, environmental, and economic justice. Variety of experience in project and program management, communications, research, complex problem solving, and policy-related work. Adaptable critical thinker with high level analytical skills and ability to think in systems, collaborate widely, work independently, and meet deadlines while maintaining a strong attention to detail. Outstanding written & verbal communication skills. Passionate about storytelling.

PROFESSIONAL EXPERIENCE

LEGISLATIVE ASSISTANT | Washington State Senate, Olympia, WA January 2021-May 2021 [Remote]

Contract LA to Senator Bob Hasegawa, the Majority Caucus Chair of the Washington State Senate. Oversight of the Senator's policy work and tracking legislation. Liaise with community and agency stakeholders. Conduct research related to committee efforts & bill proposals. Liaise with federal and state agencies to provide complex casework. Assisted at systems level with unemployment solutions during the COVID-19 crisis. Represent the Senator and his positions at meetings and events. Assist with managing, scheduling & constituent correspondence. Assist with communications efforts. Supervise Senator Hasegawa's intern.

PROJECT BASED CONSULTANT | Thurston Housing Land Trust, Olympia, WA June 2020-December 2020 [Remote]

Informed & provided technical input for the development of a strategic business plan and program model for THLT. Conducted research, created reports, informed acquisition & operations processes, researched marketing materials, liaised with stakeholders, and delivered a 3-year business plan that works to ensure housing policy mechanisms for racial equity are central.

CAMPAIGN MANAGER: BOB HASEGAWA FOR STATE SENATE | Seattle, WA April 2020 - December 2020 [Remote]

Oversight of re-election campaign. Completed 50+ endorsement processes, created multi-media materials, solicited and provided opportunities for press and community engagement, performed digital organizing. Managed social media including digital townhalls. Managed listserv & contact lists. Wrote newsletters. Coordinated with 49 Legislative Districts and regional & statewide organizations for the purpose of building coalitions around the current Public Bank effort. Worked as a team to organize a major digital town hall with regional and national leaders in Public Banking.

LEGISLATIVE SESSION AIDE: WASHINGTON STATE SENATE | Olympia, WA January 2020 - March 2020

Point of contact for the Olympia office of Senator Bob Hasegawa, longtime social justice/labor organizer and progressive. Managed scheduling & constituent correspondence. Conducted research related to committee efforts & bill proposals. Tracked legislation. Liaise with federal and state agencies to provide complex casework. Represented the Senator and his positions at meetings and events. Additionally, I assisted with organizing across the state in support of Public Banking, including coordinating resolutions with several major cities and stakeholders.

PROFESSIONAL EXPERIENCE CONTINUED

PROGRAM MANAGER/RESIDENT ADVOCATE | Quixote Communities, Olympia WA

March 2018-December 2019

First intern to create a toolkit for replicating the model, I was soon hired on as a fulltime case manager, then, promoted to Program Manager within 6 months. Responsible for the management of a resident-governed permanent supportive tiny home village for chronically homeless adults. Public relations and community outreach. Wrote and managed grants and reporting for funders & public agencies. Ensured compliance with fair housing. Maintained databases including COMPASS & HMIS. Supervised staff & volunteers. Created and managed \$250K Annual Budget. Significant policy development. Creative resource braider who connected new sustainable funding options. Developed new facilitation techniques to better involve residents in decision making. Developed internship program in partnership with 2 universities and onboarded AmeriCorps position. Assisted with developing strategic plan that empowers & involves those most impacted by organization.

GRANT WRITING ASSOCIATE | YWCA Olympia, Olympia, WA

September 2017-June 2018

YWCA is a small community organization committed to racial, economic, and gender justice. Included work on grant projects ranging from small foundation to large federal grants. Assisted with all aspects of grant writing, including research, coordinating a grant calendar, communicating with funders, writing proposals, developing budgets and creating reports. Created grant tracking tools that are still used by the organization today. Required ability to meet deadlines, work independently, and outstanding time management in addition to excellent writing skills. The position developed skills in research, data analysis, grant reporting, budgeting, critical thinking, and storytelling.

COUNSELOR | Washington DSHS, Olympia, WA

November 2016-November 2017

Supporting incarcerated community members experiencing mental illness. Conflict resolution. Managing a caseload. Planning for re-entry. I performed as floor staff Lead which required the ability to respond to crises, coordinate the floor, and extremely good judgement of people and situations. Oversight of administrative tasks and case notes. I assisted with program development and improving processes during first year of program, including providing significant support for the creation of case management policies and processes for a brand new, cutting edge, pilot program that has since moved state-wide.

FACILITIES LEAD/PROGRAM STAFF | Boulder Shelter for the Homeless, Boulder, CO

December 2014-August 2016

160 Bed Emergency Shelter in addition to transitional housing program & permanent supportive housing. Ensured safety through strong boundaries, communication, and de-escalation. Quickly promoted to Facilities Lead which involved program coordination, case management, and staff mentorship. Maintained daily administrative paperwork for emergency shelter and oversaw day to day operations of resources and donations. Act as part of leadership/decision making team. Completed significant development around trauma informed care and anti-bias training/policies for shelter staff.

References Available Upon Request

Karl Eberhard

Architect

Background

Karl received a Bachelor of Architecture from California Polytechnic State University in San Luis Obispo, with a fifth-year specialty in real estate development. While there he served as a teaching assistant in the Architecture Department and provided architectural services to the university.

After graduating Magna Cum Laude, Karl opened Eberhard & Associates, Architects in Santa Barbara, California. Though a general practice firm, much of the work of this ten-person firm was development-for-profit oriented and included urban infill housing and mixed-use buildings. During this period, he served as a Member/Chair of the City's Architectural Board of Review.

Fifteen years later, Karl moved to Flagstaff, Arizona taking on a job with the City's Economic Vitality Division. For the next fifteen years, he headed the Community Design and Redevelopment Section, which also included public art, art and sciences, beautification, design review, and downtown management. He was the City's Historic Preservation Officer and developed the City's current historic preservation ordinance and program. He briefly managed the re-write of the general plan and wrote several portions of the new land development code - a form-based code. He served on the City's Development Review Board and was a member of the Advisory Board of the Economic Collaborative of Northern Arizona - a regional economic development consortium. He staffed the City's Historic Preservation Commission, the Beautification and Public Art Commission, and the Open Space Commission.

While in Flagstaff, Karl taught a masters-program course, Planning Sustainable Communities, as an adjunct lecturer at Northern Arizona University. He later served as a Member and President of the Flagstaff Arts Council and as a member of the Arizona State Historic Sites Committee.

Upon retiring from the City of Flagstaff, Karl returned to the full-time practice of architecture, eventually moving to San Juan Island in 2002 to join his family that has lived here over twenty years and to continue his architectural practice. He is a member of the Town of Friday Harbor Historic Preservation Review Board, the Board of the San Juan Island Museum of Art, and the San Juan Island Rotary Club.

Experience Affordable Housing

Karl served as a Board Member and Chair of the Santa Barbara Community Housing Corporation which builds, owns, and operates rental housing solutions including the Faulding Hotel (SRO) and several apartment properties. In Flagstaff he served for ten years as a Board Member and Chair of Habitat for Humanity of Northern Arizona, most recently initiating an innovative program of starter (tiny) homes that puts people into conventional homeownership in just five years.

Karl designed housing developments for the City's Housing Department, Homes for People, and the Community Housing Corporation in Santa Barbara. For Mercy Housing California, Karl served as a design, development and permitting consultant, and environmental inspector for their 176-unit rental affordable housing complex at the former St. Vincent School in Santa Barbara.

In Flagstaff he designed several projects for Habitat for Humanity, Housing Solutions of Northern Arizona, and the Townsite Community Land Trust. During his employment with the City of Flagstaff, he master-planned all the properties owned by the City's Housing Land Trust and did various detailed development designs for the City's Housing Section.

Karl's extensive experience with contextual planning and architecture, for-profit and non-profit development, local government, and management, combined with years of experience with affordable housing solutions make him uniquely suited to serve as the Owner's Representative and Development Director for the Home Trust and Team Argyle!

References

Coral Evans, Staff
Senator Mark Kelly
(928) 600-6104 | voicesofmany@aol.com

Eric Wolverton, Executive Director
Habitat for Humanity of Northern Arizona
(928) 814-9368 | eric@h4hnaz.org

Duffie Westheimer, Executive Director
Townsite Community Land Trust
(928) 707-2808 | duffie@westheimers.net



Profile of Organization

Environmental Works Community Design Center is a 501(c)3 non-profit community-based architectural firm. Since our founding in 1970 we have provided feasibility/predevelopment studies and complete architectural services for human services agencies, community facilities, affordable housing providers, and public art projects. Working in both the public and private sectors, the staff of Environmental Works understand the need for community involvement, the impacts of having multiple funding sources, and ways of working effectively with pre-established budgets.

Environmental Works is committed to the effective use of capital funds in creating sustainable communities. We pride ourselves on providing quality architecture and landscape architecture within this challenging framework and working to see that the ultimate social purpose of the building is well-served in each architectural design. In addition, Environmental Works has a long-standing commitment to socially and environmentally sustainable design and have developed a number of successful strategies for designing ecologically thoughtful and affordable buildings and sites.

Our office is organized into three studios. Each studio is headed by an experienced architect who has more than twenty years' experience. Bill Singer is our Housing Studio lead, Sally Knodell is our Community Facilities lead, and Nicolas Morin leads our Landscape studio. Mike Mackie is our quality control lead and building envelope expert and moves between all of the studios advising on key parts of projects.

Experience Affordable Housing

In the past decade Environmental Works has worked on/is working on more than 50 publicly funded affordable housing projects with more than 2,100 units. In these projects, we typically provide a schematic design and ESDS checklist, as well as support the procurement of a cost estimate for the funding application.

Approximately 70% to 80% of our work is for low-income and affordable multifamily housing projects. Through our 52-year history EW has worked with hundreds of non-profit social service agencies and housing developers to create affordable and special needs housing for low-income populations. We have designed specifically for families, single adults, and individuals with physical and/or mental disabilities, teen mothers, and seniors with each population having their own challenges and opportunities.

Experience Designing in San Juan County

Environmental Works provided full architectural services from feasibility through construction administration, with Bill leading the team for the April's Grove project in Eastsound for OPAL Community Land Trust: 45 units of affordable housing, which included extensive community outreach to residents and stakeholder groups on Orcas Island.

Proposed Staffing

Bill Singer: Director of Architecture, Housing Lead. Bill has over 36 years of experience working in architecture, 25 years at Environmental Works and has managed the design and construction of over 1,500 units of affordable housing. He has particular expertise in sustainable design and permanent supportive housing. His commitment to honoring the dignity of all people, regardless of income, through his thoughtful design work leads to high quality design that reflects the mission and values of our nonprofit clients. Representative projects include: Kidder Way in Eastsound, Laurel and Forest Senior Housing in Bellingham, April's Grove in Eastsound, Cascade Meadows North MP in Winthrop, Clare's Place Supportive Housing in Everett, Compass Health Supportive Housing in Everett.

Karen Vijayanang: Project Manager. Karen aims to understand, advocate for, and practice synergies between the 4 C's – Community, Culture, Context, and the City. With previous work experience in Atlanta, being part of and leading Catalyst projects in Urban Design and Planning her work continues now in Seattle with Environmental Works with a focus on inclusive and equitable housing and mixed-use development that foster community and diversity. Representative projects include: Elizabeth Thomas Homes in Seattle, Children's Home Society T.I. in Seattle.

Christina Congdon: Christina has fifteen years of experience in architecture with an emphasis on affordable housing and community design facilitation. She provides EW an expertise in sustainable designs means and methods as well as being our expert in design for persons with disabilities. Representative projects include the following: Rod's House, Yakima. Holliwalk, Friday Harbor. Clare's Place Supportive Housing, Everett. Compass Health Supportive Housing, Everett. Community Action Center Housing, Pullman.

Relevant Project Experience

April's Grove: 12 new buildings, 45 homes in Eastsound, WA

Sail River Longhouse Apartments: 21 Unit Multi-Family Housing in Neah Bay, WA

Cascade Meadows North Master Plan: Master Plan for 48 new homes in Winthrop, WA

Villa Los Milagros: 74 units of affordable family housing in Centralia, WA

Place of Hidden Waters: 20 new & 27 renovated units in Puyallup Nation, WA

Sunny View Village: 26 units of affordable family housing in Freeland, WA

La Casa De Familia Santa: 46 units of affordable family housing in Centralia, WA

References

Lisa Byers: Executive Director, OPAL Community Land Trust.

360 376 3191 | opalclt@opalclt.org

Adrienne Solenberger: Housing Developer, Opportunity Council

360 220 7167 | adrienne_solenberger@oppco.org

Danica Reddy: Executive Director, Methow Housing Trust

509 996 5943 | danica@methowhousingtrust.org

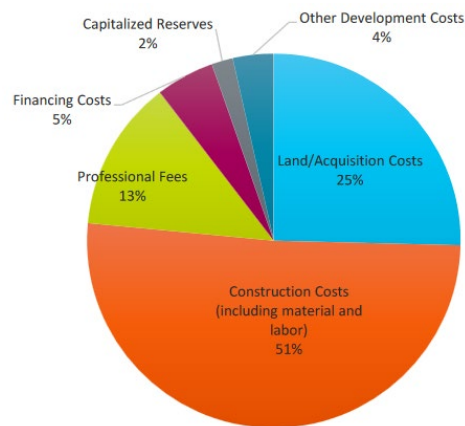
Concept Financial Information

Concept Project Budget:

Professional Fees: (Legal, Architecture, and Engineering)	700,000
Construction:	13,250,000
Site Development:	500,000
Building Cost:	11,000,000
Off-site Improvements:	500,000
Contingency (10%):	1,250,000
Developer Fee: (Pre-development, Special Studies, and Management)	450,000
Capitalized Reserves:	300,000
<u>Contingency (2%):</u>	<u>300,000</u>
Total:	15,000,000

This budget is consistent with the [affordable housing cost data](#) published by the Washington State Department of Commerce, omitting land and carrying costs, except:

1. Professional fees are reduced in anticipation of actual needs and reduced/donated services (5% instead of 13%).
2. Construction cost is increased to match recent costs on the island.

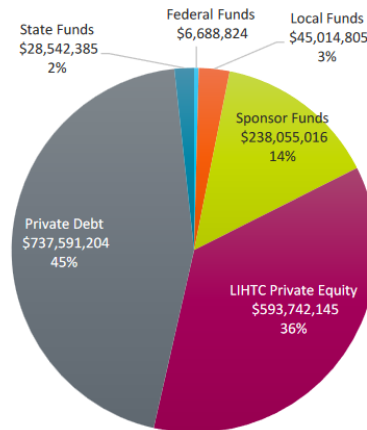


*Source: 2019 Affordable Housing Cost Data
Washington State Department of Commerce*

The San Juan Community Home Trust believes that the recent construction costs on the island (and used in this concept budget) have been disproportionately high. This budget reflects nearly double the 2019 average for the State and more than 70% greater than King County in 2020. Moving forward, the team will need to look at construction costs and [economic projections](#) and adjust this budget accordingly. At the same time, we will be looking for yet more ways to reduce construction costs.

Concept Sources of Funds:

Funding for affordable housing almost always comes from a combination of several different sources and mechanisms. Such has always been the case for the San Juan Community Home Trust. The Washington State Department of Commerce has published the following average data for [sources of affordable housing funding](#):



*Source: 2019 Affordable Housing Cost Data
Washington State Department of Commerce*

Meeting the proposed “[Affordable Housing Provided](#)”, debt for this project of 45% and a 50% maintenance ratio would require maximum allowable rents on all units. As the proposed units are smaller, the Home Trust will be looking for a lower-than-average debt amount – proportionate to the reduced rent amounts. If 50% of the units are moderate (at or below 115% of AMI), the Low Income Housing Tax Credit (LIHTC) would have to be at the maximum amount to achieve only 30% financing. Thus, the unit mix may need to reduce the moderate rate unit count and other funding will need to be greater than average.

First, we gratefully acknowledge and appreciate the various incentives and funding from the RFQ, including a favorable transaction structure, as incredible and vital contributions toward the financial planning and strategy that will be necessary. The Home Trust has a successful track record of working with such opportunities and gathering the necessary funding sources and mechanisms to complete projects. We look forward to doing so again with San Juan County as one of our partners.

Our initial thoughts are that Federal and State programs will be able to provide greater assistance through the Build Back Better Plan. We anticipate seeking Connecting Housing to Infrastructure Program (CHIP), HOME Investment and Partnership Program, and Community Development Block Grants (CDBG) funding, as well as funding from the Washington Housing

Trust Fund and the San Juan County Home Fund. We are committed to being creative, as always, in seeking funding.

We are also looking to non-conventional partners, at least from a housing perspective, such as fostering the understanding that housing affordability is an economic development matter. At the most basic level, these kinds of developments lend themselves to job training opportunities and apprenticeships. Beyond that, affordable housing stabilizes the workforce, serves as infrastructure for the economy, and produces public revenue. To the greatest extent possible, we will seek partnership with and assistance from the business and economic development sectors.

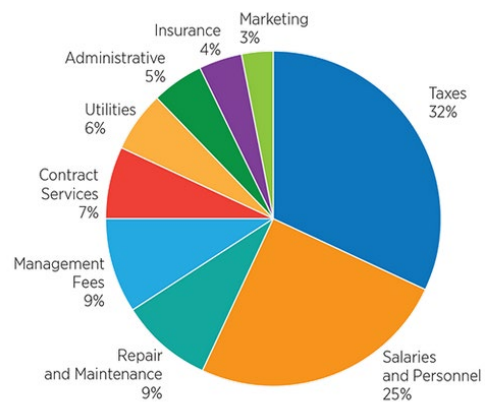
On our part, we have funds set aside to start the pre-development work and have staff committed to the enterprise. We anticipate continuing our partnership with the San Juan Island Community Foundation to strengthen our pool of major donors and/or community lenders. Currently we are working with the Community Foundation to explore how we might match this project with local philanthropic investors to take advantage of LIHTC. The Home Trust will rely on its strong history of ability to fundraise and reach out to our active donor base who have been encouraging us to take on rentals.

One identified opportunity that seems underutilized is the building industry sector on the island. Habitat for humanity has for decades successfully tapped into local contractors, tradespeople, and suppliers for donations of time and/or materials. Afterall, many of these folks, or their employees, are an identified part of our [tenant profile](#). Even a donation as small as left-over materials is a great help! We intend to explore this concept and partnership locally.

For the proportion that ends up being financed, we anticipate seeking USDA Multifamily Housing Direct Loans and are currently working with SAVI bank to finalize our needs.

Beyond Construction:

Of course, funding and building these homes is not the end of the story. As a part of the financial design of this development, the Home Trust will develop a pro forma for operating and maintaining the property in perpetuity. This graph shows the components of a rental apartment property operating budget. In addition, the financial planning for this project will include having a capital reserve study prepared, determining a monthly reserve deposit, and establishing a reserve account.





Development Concept

Concept Design Description

On the following pages are site plans and conceptual massing images to communicate our general intent as it is understood at this juncture. Developed without partner, community, and stakeholder input, and based on conceptual property information, we consider these more “proof of concept” than a conceptual design. These prove that the property can hold at least forty units and the associated parking while respecting constraints and still meeting the other design objectives discussed below. The units are mostly studios and one-bedroom units. At the end of this section are tabulations of the site utilization, density, unit sizes (square footages), unit and bedroom counts, and other data of interest.

The existing site fronts Argyle Avenue and Malcolm Street, neither frontage having edge improvements. A perpetual Historic Preservation and Access Easement is recorded against the property. It is currently four platted lots which would be reconfigured to one lot. A ten-foot utility easement bisects the lot and along the north property line (in the setback). On site are the foundations of a former building and no significant vegetation. The site gently slopes to the northeast but is essentially flat. It is known to gather storm water and a public storm water drain system exists to the east of the property up to Malcolm Street.

With this information and the Requirements and Incentives from the RFQ we have conceived a site plan that places attached single family residences along both Argyle Avenue and Malcolm Street (west and south sides) and with larger multi-family buildings and parking in the northeast portion of the property. Parking is accessed from a single driveway off the less busy Malcolm Street. Space has been allocated along Argyle Avenue and Malcolm Street for the installation of “complete streets”: edge improvements (parkway, sidewalks, street trees, street lighting, and so forth). Within the site, generous green space is allocated to create comfortable places for people to live and play and a significant pedestrian walkway system that connects all the units to Argyle Avenue and Malcolm Street (and the parking). We have included a common building on site that can serve as a community meeting space and office space but could potentially have a “guest quarters” function.

As conceived, by design and because of the proposed unit sizes, the street facing units will appear as detached single family homes. They are single story buildings and range in size from 960 to 1,250 square feet and should be right at home in the historic context. The larger interior buildings are two story, range in size from 3,800 to 4,400 square feet, and are in six- and eight-unit configurations. Finally, the community building (on Malcolm Street) is 1,540 square feet and is intended not only to be “house scale” but also “house looking” such that it too will fit well in the historic context. As can be seen in the massing images, even at this stage historic forms and proportions are shown, and we anticipate that as the design develops, we will document historic materials and details as well as some variations in the designs so as to defeat any sense of “project” in the streetscape.

In developing this concept project, San Juan County and the Town of Friday harbor have elected a site for redevelopment to achieve the affordable housing goals, but this choice is also the first step in sustainable site design. Also inherent in the site selection is its location within a network of well-connected streets and the proximity to downtown and grocery shopping locations.

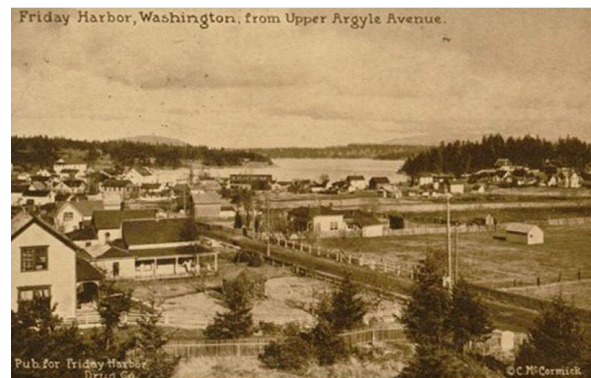
In the concept design, the area devoted to drive and park surfaces has been minimized by the layout, the minimal parking count, and the use of compact spaces. We envision that the parking spaces themselves will be permeable paving. Electric vehicle charging stations and generous, potentially covered, bicycle parking will be provided. With appropriate approvals, we would be excited to count the on-street spaces created by improving Malcolm Street as project parking and thus reduce on-site parking in an equal amount.

Most if not all of the storm water can be managed as a decentralized system utilizing the green space as filter area and retention, including planter areas dispersed within the parking area. Not yet shown, but fully in our thinking, is that the green space would include vegetable gardens for tenant use. Landscaping will minimize lawn area and be native and adapted drought tolerant materials. Rainwater harvesting could be employed. We envision planting trees, adding to the urban forest and provide some of the stormwater management.

The very conceptualization of this project as primarily studios and one-bedroom units, modest in size is another first step toward sustainability by “building small”. In the site design, the buildings have been oriented to provide substantial south and west facing roof slopes for the installation of solar panels.

Beyond the requirements of applicable codes and grantors, the San Juan Community Home Trust is in the process of formally developing internal construction guidelines reflecting the organizations sustainability values – not just environmental sustainability, but sustainability of the affordability through longevity of materials and reduced maintenance and operating costs. These include the use of metal roofs and composite framing and siding materials, better insulation and moisture barriers, programmable thermostats, triple glazed windows, energy efficient lighting, low flow plumbing fixtures, and many more choices.

We believe that the “proof of concept” design herein is consistent with the San Juan County and Town of Friday Harbor Comprehensive Plans, the Town of Friday Harbor development regulations, and the Town of Friday Harbor Historic Preservation Manual. We look forward to working with the staff of the County and Town, as well as the Town’s Historic Preservation Review Board, to finalize and document this intent and commitment.



SITE PLAN



Residential Development
SJCO Argyle RFQ

PROGRAM PLAN



Residential Development
SJCO Argyle RFQ

VIEW FROM ARGYLE AVE



Residential Development
SJCO Argyle RFQ



San Juan Community
Home Trust
*Community Preservation Through
Forever Affordable Homes*

A Federal 501(c)(3) Nonprofit Organization



Environmental Works
COMMUNITY DESIGN CENTER

VIEW OF CENTRAL GREENWAY FROM ARGYLE AVE



Residential Development
SJCO Argyle RFQ



San Juan Community
Home Trust
*Community Preservation Through
Forever Affordable Homes*

A Federal 501(c)(3) Nonprofit Organization



Environmental Works
COMMUNITY DESIGN CENTER

VIEW FROM ARGYLE AVE/ MALCOLM ST INTERSECTION



Residential Development
SJCO Argyle RFQ

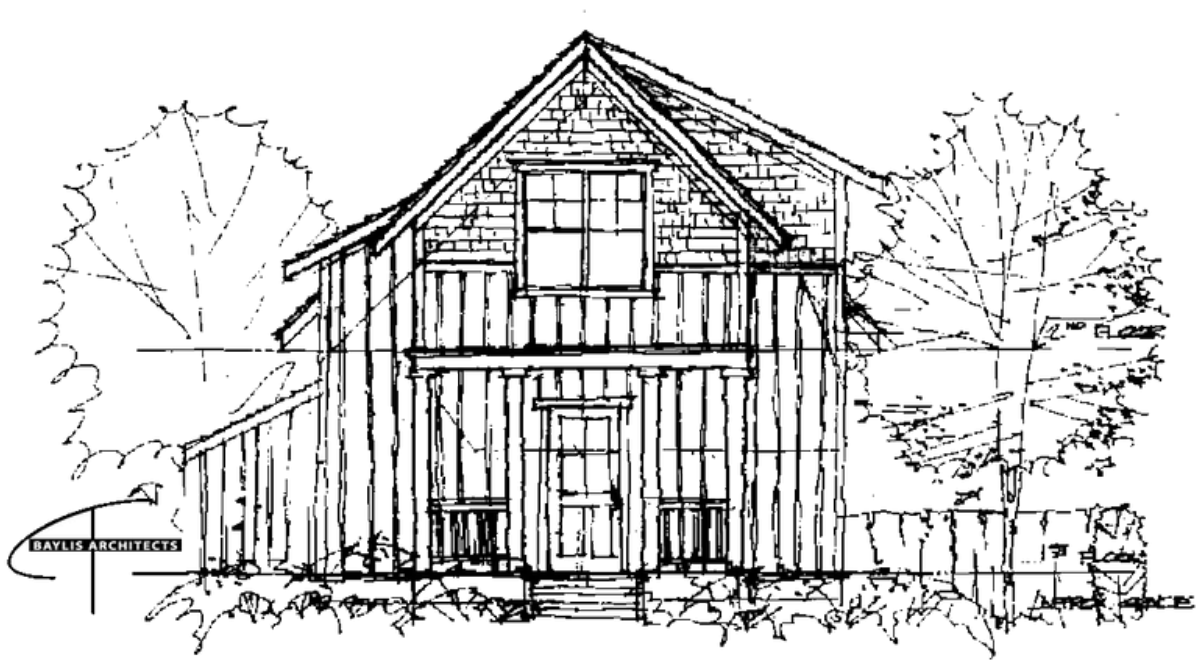
Concept Project Data

Unit Mix						
Building		Units				Totals
ID	Type	Studio	1-BR (1)	1-BR (2)	2-BR	
A	S-1	1	1			2
B	S-1	1	1			2
C	S-1	1	1			2
D	S-2	1			1	2
E	S-2	1			1	2
F	MF-2		4	2		6
G	MF	4	4			8
H	MF	4	4			8
I	MF	4	4			8
Totals		17	19	2	2	40

Unit & Building Areas								
Building		Units				Common	Buildings	Project
ID	Type	Studio	1-BR (1)	1-BR (2)	2-BR			
A, B, C	S-1	384	576				960	2,880
D,E	S-2	384			864		1,248	2,496
F	MF-2		542	576		512	3,832	3,832
G, H, I	MF	414	542			512	4,336	13,008
C	Community						1,536	1,536
Totals								23,752

Site Area Data		
Total	76,404	100%
Footprint	15,332	20%
Drive / Park	14,614	19%
Walk	4,757	6%
Landscaping	41,702	55%

FAR 0.31
 Density 23 DU/ac
 Frontage 570 FT



Affordability

Affordable Housing Provided

This project is proposed with all units, approximately forty units, being available to a mix of income qualified households including moderate (at or below 115% of AMI), low (at or below 80% of AMI), very low (at or below 50% of AMI), and extremely low-income (30% AMI) households. The maximum incomes for prospective tenants are a function of the required percentage of Area Median Income (AMI) and household size. The maximum amount of total rent for any unit (30% of gross income) includes a reasonable approximation of utility costs, all mandatory fees, and the ground lease payment.

The concept unit mix design will be as follows:

1. Moderate income households shall not exceed fifty percent of the total units, and
2. Very low-income households may be limited to ten percent of the total units, and
3. Extremely low-income households may be limited to five percent of the total units¹.

As [project funding](#) is fully developed and secured, including operations, maintenance, and reserve financial planning, additional unit mix specifications are anticipated. The Home Trust will work with the County as needed to establish and coordinate the final unit mix.

The location of the various units within the project, the unit mix, shall not be determined by the physical location of the unit on the property but rather by matching the size and bedroom count of the unit with the prospective tenant. In case multiple units match the needs of a prospective tenant, the smallest unit shall be assigned.

In the unlikely event that the property has a vacancy rate above five percent² for three months and a lack of income qualified households seeking housing, then units may be made available at market rate rents as necessary to restore ninety-five percent occupancy. In making this determination, prospective residents in excess of the three limitations noted above need not be considered as income qualified households seeking housing. Should units be rented at market rates, other than the amount of the rent, the leases shall be identical to all other leases. This exception would not apply during the first six months of occupancy of the project.

¹ The San Juan Community Home Trust, solely at its own discretion, may exceed the limitations on the maximum number of units provided to very low-income and extremely low-income households.

² The current Washington average affordable housing vacancy rate is 2.6%.

Tenant Profile

We expect that the housing study currently being prepared for the Town of Friday Harbor will show that the Town needs forty new housing units per year to meet the projected growth. And we expect that it will show that studios and one-bedroom units are the types in greatest need. This project is intended to address both expectations.

As the impact of seasonal employment is a part of the affordable housing shortage and the cost of housing, it is proposed that this housing would need to be the primary residence of residents (using industry standard metrics to determine primary residence). In this case, tenants are most likely households of one or two people, non-family or family. Compared to Washington and the United States as a whole, many will be older (35.3% of island residents are over 65 years or age). These and others will be primarily working people - first responders, municipal employees, teachers, nurses, non-profit executive directors, and so forth, roughly corresponding to the employment demographics of the County:

Leisure and Hospitality - 20.8%
 Trade, Transportation and Utilities – 18.3%
 Government - 14.6%
 Construction - 13.7%
 Education and Health - 9.3%

Based on a median household income of \$64,753, this project would serve households with the following incomes (by classification):

Moderate	\$74,466
Low	\$51,802
Very low	\$32,377
Extremely low-income	\$19,426



Management Plan

The current standard operating procedure for the San Juan Community Home Trust is to utilize a third-party service for income verification. This is consistent with the policies and procedures of other area land trusts and generally follows the Department of Housing and Urban Development (HUD) requirements³. Gross income calculations for prospective (and continuing) tenants shall be determined in accordance with RCW and other applicable regulations. Technical assistance and guidance are also provided by the Washington State Housing Finance Commission. We anticipate continuing to utilize this method for the Argyle Avenue rental housing.

The certification process must account for income from all sources when determining whether a household's income meets the income-eligibility standard, though the qualification process may exclude some income sources.

A household's income must be certified using applicant provided source documentation to verify all amounts anticipated to be earned. This information must be provided by all members of the household. If a verification is older than 120 days, new verification must be obtained.

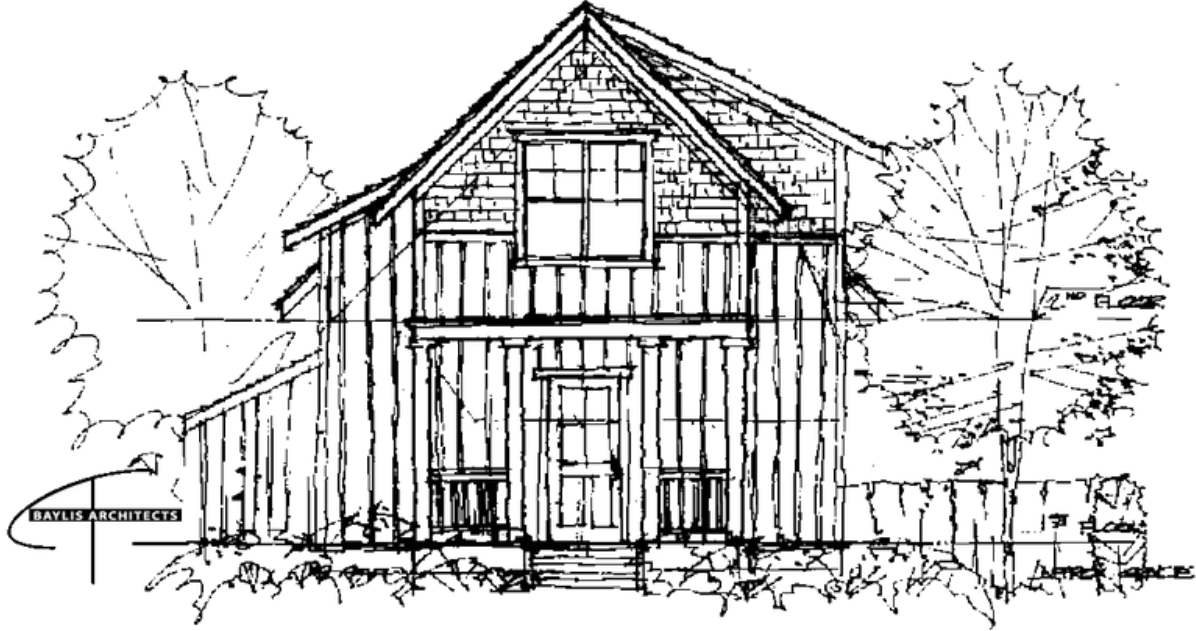
Income eligibility is calculated on a prospective basis, subject to a 12-month income projection period. For each source of income listed, a corresponding verification must be in the file – employment, unearned income, assets, and so forth. All income calculations will be documented and retained on file. If the total household income calculated is at or below the maximum income for the unit, the household is eligible.

Initial certification occurs at the point of occupancy, and tenant households must be income-qualified prior to executing a lease. Household incomes will be annually certified on a specific date and may be additionally re-certified under other circumstances (change of household composition, change of unit, and so forth).

An annual compliance report including a written summary of the income, household size, and rent payable by each of the tenants, shall be provided to the County each year. At the County's request, individual tenant income and occupancy certifications and supporting documentation will be submitted.

For additional information and detail, please see [Income and Rent Limits for All Tax Credit and Bond Financed Properties](#) from the Washington State Housing Finance Commission.

³ Some variations may occur to accommodate other funding providers.



Proposed Transaction Structure

Project Timing

Developing the Concept

The RFQ and this response accomplishes much in terms of developing the project concept. However, for both County and the Home Trust, and possibly for the Town of Friday Harbor, there remains the need of further definitions, negotiations, and decisions. This work would take place under the Exclusive Negotiating Agreement, likely concluding with a Memorandum of Understanding. We budget **six months** to accomplish this task.

Feasibility Assessment

This phase includes three parts – preliminary planning, design, and approvals, development costing and pro forma, and securing funding. Preliminary planning, design, and preliminary approvals will be an iterative process and we budget **twelve months** for both. The work of costing and developing a pro forma will be an iterative part of the planning and design and does not have a separate time budget.

Securing funding will be a background process that begins with acceptance of the response to the RFQ and continues until all funding is secured. However, securing funding will likely be phased such that the Home Trust could proceed with the transaction and initiating the final architecture and engineering with partial funding secured and a reasonable belief that the remainder of the funding is likely. While no time is separately budgeted for this, it does introduce two milestones that are necessary for proceeding.

Inking the Deal

With the above completed, we anticipate the development of various final real estate and agreement documents, possibly ordinances, and other matters necessary to formalize and execute the transaction. While there will be overlap with the previous activities, we none the less budget **three months** for this activity. This would make the **closing date in the fall of 2024**.

Architecture and Engineering

For the development of final architectural and engineering plans, and approval of the necessary permits, we budget **nine months**.

Construction and Lease-up

Per this scenario, construction starts in the summer of 2025. We budget **twenty-four months** for construction which, with no development phasing, makes occupancy occur in the summer of 2027. The Home Trust intends to develop the project in phases which could allow partial occupancy in the summer of 2026.

For the Record: Many of the time variables are dependent on entities and processes over which the Home Trust has no control. We do believe however, that we have budgeted reasonable time for these activities.

Proposed Transaction Structure – Option 1

San Juan County and the San Juan Community Home Trust will enter into a Ground Lease Agreement with at least the following basic or conceptual provisions:

1. The San Juan Community Home Trust will develop, own, operate, and maintain approximately forty permanently affordable rental housing units on the property.
 - a. The final number of units to be determined by the Town of Friday harbor development review process and approval.
 - b. Tenants served may have a variety of income levels, with a mix of moderate through very low-income households per the RFQ.
 - c. Units must be the principal residence of tenants.
2. The San Juan Community Home Trust will have unconditional rights to possession and control of the property, economic benefit including receiving rental and any other income or profits, enter into easement agreements and to grant any and all easements in conjunction with the development and operation of and the property, and exclusive right to sublease individual dwelling units.
3. The San Juan Community Home Trust will have unconditional obligations to construct the project, pay for all of the capital investment (except as noted herein), economic risk associated with the project, maintain insurance coverage, pay all taxes (except as noted herein), and pay for all maintenance and operating costs.
4. Term of lease: 99 years.
5. Rent: \$30 per unit per month commencing upon issuance of a Certificate of Occupancy by the Town of Friday Harbor.
6. It is understood that the San Juan Community Home Trust may mortgage or otherwise encumber San Juan County's leasehold estate under one or more leasehold mortgages.
7. At the conclusion of the term of the lease, the San Juan Community Home Trust will Quit Claim the improvements to San Juan County at no cost to the County. Should the lease terminate prematurely, San Juan County shall pay the San Juan Community Home Trust fair market value for the improvements.

Proposed Transaction Structure – Option 2

The RFQ calls for a proposed transaction structure that is a low to no cost ground lease as proposed in Option 1 (above). San Juan County may find that a no cost transfer of ownership transaction serves the County better and the San Juan Community Home Trust would support this alternative transaction structure. We believe that this would save the County the costs of administering the ground lease and reduce the County's liabilities. Notably the County's goals, restrictions, and protections can be equally memorialized by mechanisms such as restrictive covenants or other agreements. As a community land trust, retaining ownership and managing land under affordable housing is everyday business for the Home Trust. But importantly, we believe that this transaction structure would provide more and better funding options for the Home Trust, further supporting the realization of a viable project.

Other Terms and Conditions

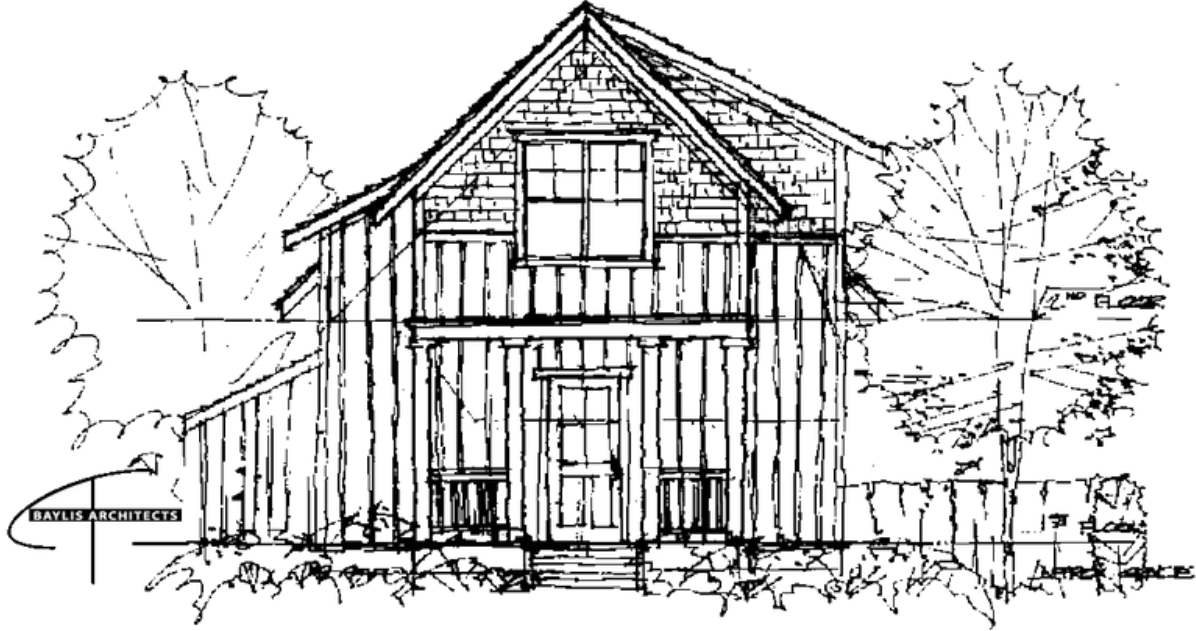
The San Juan Community Home Trust desires the following in addition to the incentives, subsidies, and direct investments represented in the RFQ and supporting materials:

1. San Juan County to provide information about the property including:
 - a. Title Report
 - b. Metes & Bounds Topographic Survey (w/ utility sizes and locations)
 - c. Environmental Site Assessment (No Recognized Environmental Conditions)
 - d. Soils Report
2. Rezone to Multifamily Residential completed.
3. Clarification that "funding of street frontage improvements necessary for the site" includes engineering and the various permit fees.
4. San Juan County to assist in identifying needs and opportunities and to assist and support the San Juan Community Home Trust as needed in:
 - a. Development planning, coordination, and documentation.
 - b. Meeting Town of Friday Harbor desires and requirements (for example ordinance changes, Development Agreement, and approvals).
 - c. Securing County and Town incentives (for example permit streamlining, grants, and payment, reduction, or waivers of permit, impact, and/or connection fees).
 - d. Securing Federal and State agency technical assistance and funding (for example ORFH, CHIP, HOME, and CDBG).
 - e. Formally establishing the Home Trust as being exempt from property and other taxes per RCW 84.36.560 (with regard to this property).



Thank you!





Appendix A – Additional Team Resources

BENNETT ENGINEERING, LLC

Bennett Engineering, LLC (Bennett) was formed in 2003 to provide professional consulting services in the fields of civil engineering and environmental consulting in northwest Washington. General information regarding our company is presented below.

Company Name/Address:	Bennett Engineering, LLC 2324 James Street Bellingham, WA 98225
Office Phone Number:	(360) 671-2600
Cell Phone Number:	(360) 739-9844
Authorized Company Contact:	Thomas E. Bennett, P.E., Managing Member
Electronic Mail Address:	tomb@bennettengr.com
General Liability Insurance:	Liberty Mutual Insurance
Professional Liability Insurance:	Lloyd's of London – WKF&C
Federal EIN:	83-0344771
Washington UBI No.:	602 254 254

PROJECT ENGINEER QUALIFICATIONS – THOMAS E. BENNETT, P.E.

Thomas Bennett, P.E. and Engineer-of-Record will perform all project management, engineering design and reporting, and construction support services required for the project. Mr. Bennett has over 30 years of experience designing single- and multi-family housing projects in Whatcom, San Juan, and Snohomish Counties. He has worked on a variety of affordable housing projects for non-profit and governmental clients, including Homes for Islanders (HFI), Housing Lopez (HL), and San Juan Community Home Trust (SJCHT). Mr. Bennett specializes in stormwater management solutions for residential and commercial projects in accordance with the Stormwater Management Manual for Western Washington (DOE Manual) and local stormwater codes, including bioretention facilities for stormwater treatment and piped and open pond flow control systems. He regularly works with the Town of Friday Harbor and has worked with San Juan County staff for the past 15 years, including projects on San Juan, Lopez, and Orcas Islands.

BENNETT ENGINEERING QUALIFICATIONS

Bennett has completed civil engineering designs for numerous single-family housing projects in San Juan County and the Town of Friday Harbor, including:

- The Heritage Court (9 homes) for HFI (Friday Harbor);
- Maypole Meadows (22 homes) for HFI (Friday Harbor);
- Foxhall Subdivision (16 homes) for HFI (Friday Harbor); and
- Fish Bay Cottages (6 homes) for HL (Wardell Architects, Lopez Island).
- Holliwalk (8 homes) with SJCHT (David Waldron Architect, Friday Harbor)
- North Lopez Village–Phase 1 (15 units) for HL (Third Place Design, Lopez); and
- Lopez Landing (24 single-family homes, 8 apartments, 6 carriage houses, and 3 community buildings) for NW Resources (Ross Chapin Architect, Lopez Island).

Bennett has completed several other civil engineering projects in San Juan County, including design and construction support for the Briggs Lake dam project for the Roche Harbor Water Association, access and stormwater design services for the Jackson Beach boat launch (Port of FH) and the Friends of Lopez Island Pool (FLIP, Wardell Architects), site planning and stormwater design for a mixed-use commercial building for Buck Commercial Properties in Friday Harbor, stormwater site plans for multiple single-family residences, and site and utility plans for separate airplane hangar projects at the Friday Harbor and Roche Harbor airports. Bennett also currently provides environmental monitoring and reporting services to San Juan County for the Orcas Island Landfill.

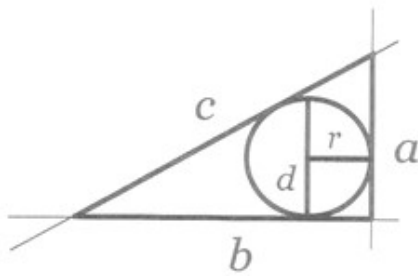
EXAMPLE PROJECT–MAYPOLE MEADOWS, MALCOM STREET, FRIDAY HARBOR

The Maypole Meadows project consisted of a 20-lot Planned Residential Development (PRD), with lot sizes ranging from 4,380 to 5,487 square feet. The project included a 22-foot-wide street, with sidewalk and rolled curb and gutter both sides, constructed within a 40-foot right-of-way. New water, sewer, and storm drain mains and service connections were installed within the street section. The water main was looped between the existing mains at Malcom Street and Hamilton Ranch Road, and a fire hydrant was installed in the center of the site. The soils encountered at the site were subject to a shallow ground water table in the wet season; as such, infiltration based BMPs were not feasible for the project. The stormwater management approach involved constructing a detention pond within the pond tract located in the northwest corner of the site. Runoff from pollution-generating streets and driveways was routed to a treatment vault located at the south end of the pond. Runoff from roof and yard areas was routed directly to the pond in separate piping. The pond discharges stormwater at controlled rates to the storm drain system at Malcom Street in accordance with the DOE Manual and TFH requirements.

CLIENT REFERENCES

Please feel free to contact the individuals listed in table below as client references.

Project Reference	Organization	Phone Number
Bill Gendron/Justin Roche, Directors Heritage Court/Maypole Meadows/Foxhall	Homes For Islanders	(360) 370-5944
James Goetz, Director Holliwalk Project	SJCHT	(360) 378-3811
Craig Pierce, President Lopez Landing Project	NW Resources, Inc.	(425) 299-2600
Wayne Haefele, Review Engineer TFH Projects	Town of Friday Harbor	(360) 472-1407
Kendra Smith, Director Orcas Island Landfill	San Juan County Dept. of Environmental Stewardship	(360) 370-0532
Bob & Lois Wardell, Architects Housing Lopez/FLIP Projects	Wardell Architects	(360) 468-2772
John Gresseth, Architect Commercial/SFR Projects, Friday Harbor	Gresseth Architects	(360) 378-6364



HBHansen

CONSTRUCTION inc

PO Box 266, Lynden, Washington 98264

360.318.8982 phone 360.318.8983 fax

UBI#602 084 365 LIC#HBHANC1995BW

HBHansen Construction has been family owned and operated since 1992 and provides quality construction management services to commercial and residential clients. Our services are offered in a straightforward, financially responsible manner with quality pre-construction consulting and accurate budgets and timelines. The HBH team continually strives to create close and mutually beneficial relationships with clients and associates by operating the company with a high level of reliability, honesty and integrity.

Key Personnel:

Bernie Hansen- President, Estimator, and Quality Control Manager

Kristen Hansen- Vice President and General Manager

David Reasoner- Contract Administrator

Relevant Project Experience Summary:

(Projects in logistically challenging locations with Public Funding)

1. Orcas Island Library. 5,500 SF library building of significant local culture. Completed on time and budget.
2. Point Roberts Library. Reconstructed a 100-year-old former fire station into a new library for a remote community. Historical and Cultural worked around.
3. 3) Peach Arch State Park. HBH replaced all the existing water and sewer mains in the park that is at the International Border. The Park remained open to the public and under close supervision of Homeland Security and Washington State Department of Transportation.
4. NPS Newhalem Visitor Center envelope upgrades. Replaced all the existing glazing and skylights with new energy efficient system upgrades.
5. Moran Visitor Center on Mt Constitution. Removed an existing derelict building at the top of Mt Constitution and replaced it with new restroom facilities as Phase 1. New restroom building, new utilities all while working around the public at the top of a mountain in Washington State Parks. Tree retention, wildlife and environmental restrictions in place and protected by HBH.
6. NPS American Camp: Visitor Centre on San Juan Island. We replaced the existing Visitor center, which was a 1448 square foot, double-wide trailer installed in 1977, with a 2,206 square foot wood framed Visitor Center. The septic system was also replaced. The project complied with a Certification Level according to the U.S. Green Building Council's Leadership in Energy & Environmental Design (LEED) Rating.

BERNIE HANSEN

Construction management, estimating, and quality control

Experience – 30 years of experience in the construction industry.

HBHansen Construction Inc.; 1991 to Present. Custom residential and light commercial estimating and project management. Daily supervision of multiple construction crews for maximum efficiency and quality control. Estimating and Negotiation of Construction Costs for highly competitive markets. Over 60 public work contracts successfully completed. Managed, trained and led team of 30 employees

Education and Certifications

Certified Erosion and Sediment Control Lead (CESCL)
Washington State Commercial Truck Driver's License
Whatcom County and Skagit County Septic Installer
license Certified forklift operator
Certified Flagger
First Aid & CPR Card

Relevant Skills

Practical knowledge of local building codes, Best Management Practices and techniques, and WSDOT specifications.
Dispatch and care of construction equipment and tools for best use and efficiency.
Experienced commercial truck driver including hauling heavy equipment and maintenance.
Septic installation experience including installing 3 Large Onsite Septic System (LOSS).
Skilled equipment operator, carpenter, concrete form setter & finisher, and grade & layout engineer.
Skilled user MS Outlook, MS Project, MS Excel, MS Word
Skilled at "outside the box" problem solving and value engineering.
Skilled at explaining, teaching, and hand drafting concepts and techniques.
Skilled at bringing different project stakeholders (architect, engineer, government agent, owner, sub contractor) together to negotiate common resolutions.
Skilled at tracking submittals, shop drawings, addendums, change orders, contract documents and construction accounting principals

References (more available upon request)

Dale Buys – R&E Engineers, 360-354-3687
David King, AIA – King Architecture, 360-647-1506
Rod Lamb – Whatcom County Parks Department, 360-733-2900
Vernon Abelson – SMR Architects, 206-623-1104

Personal

Enjoys spending time boating, kayaking, fishing, and coaching youth sports.



Rozewood Environmental Services, Inc.

308 Lopez Road · P.O. Box 238
Lopez Island, WA 98261
(360) 468-4448 · rozewood@rockisland.com
www.rozewood.com

Federal Identification No.: EIN: 91-1903372
Washington Unified Business ID No. 601 875 100

Rozewood Environmental Services, Inc., established in 1996 and incorporated in 1998, offers environmental consulting services in the fields of wetland science, soil science, landscape ecology, and watershed analysis. Specific scientific services include environmental permitting; wetland inventories, wetland delineations and wetland reconnaissances of sites proposed for development (i.e., residential, commercial, road improvement corridors, powerline corridors); wetland mitigation and monitoring; stream assessments; Ordinary High Water Mark (OHWM) mapping of streams, lakes, and marine shorelines; soil investigations for soil mapping & analysis, soil erosion (non-geotechnical), soil drainage issues, prime farmland determinations, and soil quality analyses; natural resource inventories and vegetation mapping; amphibian surveys; and land use mapping and change studies (measuring both recent and historic changes) via remote sensing analysis and ground verification site work. Rozewood Environmental Services, Inc. is located on Lopez Island, Washington, and services all of San Juan County and numerous other counties in western and eastern Washington State.

Key Personnel:

Scott J. Rozenbaum is a senior level wetland scientist and soil scientist, with 34 years of experience conducting environmental investigations in western Washington. He possesses a M.S. in soil science, a B.S. in geology, and is a nationally certified senior professional wetland scientist (SPWS), a nationally certified professional soil scientist (CPSS), a regionally certified wetland delineator through the U.S. Army Corps of Engineers wetland delineation certification program, and a regionally certified erosion & sediment control lead. He has conducted several hundred wetland delineations and dozens of wetland inventories, stream mapping, and OHWM determinations in various counties and cities in Washington State. He has conducted numerous soils investigations throughout the Puget Sound area and has provided research and expert testimony in hearings and court cases specific to soils and wetlands. Mr. Rozenbaum is well respected by permitting agencies, and his solid rapport with the agencies offers benefits during the permit process. He also has been an instructor in the fields of soil science, wetlands ecology, geomorphology, hydrology, and remote sensing at the university level (University of Washington, Washington State University, Wayne State University) and in local educational outreach programs (cooperative extension, San Juan County Conservation District, elementary school, etc.).

Education

M.S. Soil Science, Washington State University, Pullman, Washington. Graduated 1988.
B.S. Geology, Wayne State University, Detroit, Michigan. Graduated 1984. Emphasis: Geomorphology

Certifications and Professional Affiliations

- Certified Senior Professional Wetland Scientist (Cert. No. 00490), Society of Wetland Scientists
- Certified Professional Soil Scientist (Cert. No. 24803), ARCPACS: A Federation of Certifying Boards

- in Agriculture, Biology, Earth & Environmental Sciences
- Certified Wetland Delineator, U.S. Army Corps of Engineers, Seattle District
- Certified Erosion & Sediment Control Lead (ID # ECO-3-1312119)
- Member, Soil Science Society of America
- Member, Society of Wetland Scientists
- Member, Society of Ecological Restoration
- Member, Washington Native Plant Society
- Past member (8 years) San Juan County Noxious Weed Control Board

Professional Experience

- *Environmental Permitting Agent, Professional Wetland Scientist and Certified Professional Soil Scientist* - Rozewood Environmental Services, Inc., Lopez Island, WA 1996 – 2022.

• Conduct freshwater and estuarine wetland delineations, reconnaissances, wetland inventories, and wetland mitigation/restoration designs for public sector and private sector clients. • Evaluate wetland mitigation performance through monitoring and documentation. • Perform wetland functional assessments to determine relative value and level of performance of individual wetlands. • Conduct stream surveys, mapping, invertebrate sampling, and assess channel and habitat conditions. • Determine and flag Ordinary High Water Marks (OHWMs) on marine shorelines, lakes, rivers, and streams in Washington State. • Identify marine and estuarine shoreline habitats and assess potential impacts from upgradient development. • Conduct soil mapping and assessment of soil resources. • Perform soil characterization and field sampling for prime agricultural land designation, erosion, soil quality, and soil foodweb analysis. • Provide expert witness testimony on soils and wetland issues. • Conduct aerial photograph interpretation for land use changes, wetland and stream mapping, and upland vegetation mapping. • Onsite mapping of upland habitats and priority habitat components. • Present classes, workshops, and trainings on wetlands, soils, and habitat assessments. • Evaluate watersheds to determine runoff and infiltration patterns of stormwater. • Assist in the development of stormwater management plans. • Coordinate with other professionals including surveyors, architects, engineers, planners, agency personnel, biologists for Endangered Species Act determinations and FEMA coastal floodplain analyses, and archaeologists for Section 106, National Historic Preservation Act determinations.

• Draft, coordinate, and assemble environmental permit applications, including State Environmental Policy Act (SEPA) checklist, Joint Aquatic Resources Permit Application (JARPA), Forest Practices Application (FPA), State of Washington Hydraulic Code/Hydraulic Project Approval (HPA), Federal Clean Water Act Section 404 and 401, shoreline development permits under State Shoreline Management Act, Washington State Water Rights/Reservoir permit application, National Pollutant Discharge Elimination System (NPDES) and State Wastewater Discharge permit, and local-level Clearing and Grading permit and Critical Areas assessment components for local permits.

- *Soil and Wetland Scientist* - Shapiro and Associates, Inc., Seattle, WA 1989 – 1996. Position included very similar work experiences and professional services as described above.

- *Wetlands Planner* - Pierce County Planning & Natural Resource Department, Tacoma, WA 1988 – 1989.

STAR SURVEYING, INC.



LAND SURVEYING - PLANNING - MAPPING

Star Surveying, Inc. has over 30 years' experience providing quality maps and land surveying services to clients throughout San Juan County. Our firm is represented by three Professional Land Surveyors who have over 50 years of combined experience and are supported by our staff of survey professionals. Our teams are well versed in the manual of survey instructions and draw from diverse experience in a broad range of disciplines such as land development, engineering, GIS, geology, geophysics, wildlife ecology and surface water management.

Our firm is proud to have long-term relationships with clients such as **Orcas Power and Light Cooperative, Gray & Osborne, Inc. Consulting Engineers**, and the **Town of Friday Harbor** as well as an established history providing surveying and mapping services to affordable housing entities throughout San Juan County. Our firm has provided surveying and engineering support to organizations including but not limited to **Homes for Islanders, San Juan Community Home Trust** and **Housing Lopez**. When possible, our services have been provided pro-bono (or at a reduced rate) as our way of serving our community and supporting friends and neighbors.

In January 2002, **Star Surveying completed the Malcom Argyle Short Plat** mapping the site intended for the proposed 42-unit housing development. With the site data already in our database our teams are ready to expedite surveying and mapping for various phases of development

San Juan Community Home Trust

San Juan Island, WA

Malcom Argyle Short Plat: Completed Short Plat of Malcom Argyle, recorded with San Juan County Auditor in January 2002, Vol. 7 Pg. 17 of Plats. AFN 2002-0117009. Said plat is the site for the proposed housing development.

McDonald Street and Sun Rise III: Site surveying and mapping for McDonald Street and topographic mapping for Sun Rise III was completed in March 2022.

Holliwalk Housing Development: Ongoing construction staking including (but is not limited to) setting of referenced stakes for multiple foundations, utilities, roads, parking, grading, landscaping, and as-built drawings. The project is for multi-family structures located in Friday Harbor, WA. Project is ongoing

Reference: Amanda Eichelberger, Executive Director Email: amanda.e@hometrust.org (360) 378-5541

Homes for Islanders

San Juan Island, WA

Surveying and Engineering Support for development of over 84 low-income residential units.

Rocky Bay, Country Village, Fox Hall, Grover Street, Leeward Cove, Park Plaza, Woodland Estates and North Beach Communities. Completed 2008

Justin Roche, Executive Director Email: director@homesforislander.org (360) 370-5944

Housing Lopez

Lopez Island, WA

Fish Bay Cottages

Surveying and topographic mapping for development of 6-unit residential housing project.

Project is ongoing.

Weeks Road

ALTA/NSPS Land Title survey for multiple parcels located on Weeks Road, Lopez Island for Housing Lopez future development. ALTA/NSPS Land Title Survey completed in July 2022.

John Taylor, Co-Chair, Member of Executive Committee, Co-Chair of Investment, Finance and Project Development Committees Email: housinglopez@gmail.com (206) 817-6007

Lopez Community Land Trust

Lopez Island, WA Surveying

and topographic mapping for various projects. Topographic mapping and easements for a water line were completed in early 2022.

Sandy Bishop, Executive Director Email: lcit@rockisland.com Phone: (360) 468-3723

Qualifications of Key Staff:

**Robert M Anderson, P.L.S. – Senior Surveyor
(Friday Harbor & Anacortes)**

University of North Carolina; Licensed since 1981 PLS# 19612

Two-time recipient of Washington Consulting Engineers Council Grand Award of Excellence for innovative use of GPS. In 1999, Bob received an appointment by the UN as **Technical Advisor in Bhutan for the National Urban Surveying & Mapping Group**. After 5 years mapping the Himalayas, Bob returned to San Juan Islands in 2007 and purchased Star Surveying, Inc. Bob has fostered numerous professional relationships with local contractors, real estate agents, town and county officials throughout San Juan County.

As chief surveyor Bob has managed numerous surveying and mapping projects for various San Juan County affordable housing entities and currently serves on the board of the San Juan Community Home Trust. His wealth of local knowledge has made him a go-to resource for numerous architects and developers in his community.

**Kimberly Bourns, P.L.S. – Survey Manager
(Friday Harbor & Anacortes)**

Oregon Institute of Technology in Klamath Falls, OR; Licensed since 2005 PLS #41961. Received degree from Renton Technical College; A.A.S Degree; Civil Engineering & Survey Technology. In April 2021, Bob welcomed **Kimberly Bourns**, a Professional Land Surveyor with over 20 years of surveying education and experience to join the firm as Co-Owner and Survey Manager. Kim manages our Anacortes, WA office overseeing the management of quality control from field to finish and is responsible for project management, computations, PLS review and technical support. A skilled project surveyor, Kim has extensive experience in large scale boundary surveys, topographic mapping, ALTA surveys, airport surveys, construction layout and support, subdivisions and records research.

James Wilson, P.L.S. and Project Manager

(Friday Harbor) PLS# 21123177. James has over 20 years of experience delivering field to finish maps and surveys. He has performed boundary and engineering calculations for staking on Military lands and for private sector clients. As Project Manager, James is responsible for Civil 3D survey and topographical map production, field data processing and data analysis.

1. *What information regarding your organization's financial health (including any recent audits) can you share with the County?*

Please see the attached: our most recent audited financial statements, as well as year end information for 2022.

2. *Can you provide any information on how the Home Trust intends to steward the project over the 50+ year horizon and ensure that the management of the project will be upkeep in the long term?*

The San Juan Community Home Trust exists to provide a portfolio of **permanently** affordable housing to San Juan Island. Therefore, we have built Stewardship into every aspect of our work. Ensuring our communities are safe, well-maintained, and engaging for our residents and neighbors is a major part of executing the Home Trust's mission.

To us, Stewardship starts at the beginning through the use of thoughtful design and use of materials that will stand the test of time wherever we can. Additionally, in creating and administering our programing, we ensure our policies and regulations are adequate, up-to-date, and enforced.

As projects take shape, capital needs and long-range maintenance planning are critical. We prioritize these processes in every project we do, so that we can adequately fundraise for such needs. We have done maintenance reserve studies via third party firms for all of our existing properties that allow us to properly plan for maintaining them. We have found this to be an excellent practice which we plan to continue.

Our goal as an organization is to promote economic diversity and development, and support a sustainable island community while practicing responsible stewardship of our rural environment. Therefore, we provide organizational support to Stewardship work through our operations and volunteerism. Our Board Stewardship Committee is actively involved in ensuring properties are well maintained and policies enforced, and identifying needs in those areas. Partnering with a highly capable firm around providing property management will be another key component of how the Home Trust provides strong Stewardship to the Argyle property. This will allow us to bring in experience and expertise around maintaining rentals specifically.

The Home Trust is the unofficial housing hub of San Juan Island. We have broad community support around our success and our mission, and plan to continue to strengthen our relationships in the community to meet shared goals around providing well maintained housing in perpetuity.

3. *Can you speak to any experience your organization has with regard to sourcing materials, design, and engineering that promotes appropriate climate mitigation strategies?*

The Home Trust has strived to promote environmental stewardship to our rural environment since the organizations inception. This has taken shape in a variety of ways, from innovative infrastructure to high-level green building standards. Our commitment to climate resilience is clear in each of our builds.

Our 15-Home Salal neighborhood used a thoughtful, compact design that maximizes individual opportunities for gardening and green space while maximizing density. Sun Rise I, a neighborhood made up of 14 condominiums around a shared courtyard, elected to use some of the most innovative “green” systems available fight climate change at the time of development, including solar hot water heating, rain catchment systems, and a state of the art LOSS system for sewage. Sun Rise II, our next development, consists of a pocket neighborhood of upcycled craftsman homes which were barged from Vancouver Island. Our most recent construction, HolliWalk, will be state energy code by approximately 18%, and, we are in the process of seeking grant funding to complete a solar power installation in that neighborhood.

For the Argyle Project, the Home Trust is planning to partner with Environmental Works Community Design Center, a well known non-profit organization focused on planning, designing, and advocated for community-centered environments.