

2023-24 Super-NOFA Application for Affordable Housing Funds

Marin County Housing & Federal Grants Division

This application is for affordable housing developers in Marin County, California who would like to apply for multiple state, local, and federal funding sources simultaneously. Please refer to the Notice of Funding Availability (NOFA) released on February 6, 2023 for detailed information about qualifications and application requirements.

The following grant sources and amounts are available through this application:

1. **Marin County Affordable Housing Fund (HTF) and State Permanent Local Housing Allocation (PLHA)** - \$2.3 million
2. **Federal HOME-ARP** - \$2.4 million
3. **Federal CDBG Housing** - \$600 thousand

Applicant Information

Organization Name

Homeward Bound of Marin

Website URL

www.hbofm.org

DUNS

949337059

Mailing Address

1385 North Hamilton Parkway
Novato, California, 94949

Project Contact Name

Paul Fordham

Title

Co-Chief Executive Officer

Email Address

pfordham@hbofm.org

Phone Number

(415) 382-3363

Executive Director Name

Mary Kay Sweeney

Executive Director Email Address

mksweeney@hbofm.org

Is there a co-applicant organization?

No

Briefly describe your organization, including mission, programs, staff experience, and number of clients served. Describe the co-applicant organization, if applicable.

Founded in 1974, Homeward Bound is the leading provider of shelter and supportive housing for people experiencing homelessness in Marin County, including veterans, families, seniors, and people who struggle with mental health issues or disabilities.

Our mission of “opening doors to safety, dignity, hope, and independence,” is coupled with a vision that “everyone deserves a place to call home.”

Serving 886 people last year (252 family members and 634 single adults), Homeward Bound offers 20 residential programs throughout Marin. Safe and dignified living accommodations are paired with individualized counseling and an array of social and employment services to help people secure housing, achieve self-sufficiency, regain their independence, and lead fulfilling lives. Last year, our programs and services ensured 88% of families and 77% of adults exited Homeward Bound for housing opportunities.

Homeward Bound has grown steadily over the years in response to the demand for housing and services, and our annual agency budget, now over \$13 million, has kept pace. Our workforce has also expanded each year so that we now employ a highly diverse, experienced, and skilled staff of 75 full-time and 27 part-time individuals—including numerous persons with lived experience of homelessness—who are engaged in program activities, support services, housing assistance, job training, and social enterprises.

A key reason for Homeward Bound’s forward progress has been the sustained and consistent leadership of a highly committed and engaged Board of Directors, including persons with lived experience, varied passions, perspective, and skills. In addition, a five-person leadership team brings more than 70 years of relevant experience and a proven track record of collaboration and success. This team includes two Co-Chief Executive Officers, Chief Operating Officer, Chief Program Officer, and Chief Equity Officer.

Over the years, Homeward Bound has successfully launched several major developments comparable to this project. In 2022, we celebrated the opening of the Jonathan’s Place after a multi-year \$19 million capital campaign. It now provides 32 beds of affordable housing and 40+ beds of emergency shelter for adults. In 2018 we opened King Street Senior Housing in Larkspur with a \$1.3 million renovation budget and a construction timeline of less than one year, transforming a vacant former convent into a permanent group home for 12 seniors exiting homelessness. In 2016, we opened Oma Village following a multi-year construction schedule and \$6.6 million budget. Built with significant local grant support, this Novato housing community now provides 14 affordable homes for families transitioning from homelessness. In 2008, we opened the doors to the Next Key Center, which took \$9.3 million to complete and is home to 25 adults and 4 small families living in 29 studio apartments; a 6-bed medical respite program; our culinary job training program and social enterprise hub, and Homeward Bound’s administrative offices.

Have there been any recent or upcoming leadership transitions?

Homeward Bound’s continues to plan and adapt its leadership to lay the foundation for continued success and growth. Last year, the agency moved from a single Executive Director to a Co-Chief Executive Officer model by promoting its Deputy Director, Paul Fordham to work alongside Mary Kay Sweeney. This change not only recognized the reality of Paul’s professional development and performance, but also positioned the agency for a smooth executive transition when Mary Kay eventually retires. Likewise, the agency had futures needs and challenges in mind when it established key new leadership positions and recognized performance by promoting LaSaunda Tate to Chief

Operating Officer, Anna Hurtado to Chief Program Officer, and Shikira Porter to Chief Equity Officer. Finally, Homeward Bound's Director of Finance, Bob Heinen, has decided to enter a well-deserved retirement, but is graciously continuing to support the agency as it recruits for a new Director of Finance. The agency's Finance Department also includes an Accounting Manager and three finance associates, all of whom helping to ensure continuity during the transitional period.

Recently and over the years, Homeward Bound's agency trajectory has been one of program expansion and budget increases. For example, since the beginning of the pandemic the agency has added the following new programs, some permanent and others temporary responses to COVID-19:

- 2022 – added 40+-bed Jonathan's Place Emergency Shelter and 32-studio-unit Jonathan's Place affordable housing
- 2022 – opened 18-studio-unit Casa Buena affordable housing in Corte Madera
- 2021 – launched the Casa Nuestra program, providing Housing Choice Vouchers and scattered site housing for 10 families
- 2020 – operated and then closed temporary motel-based non-congregate shelters for 23 families and up to 60 adults at risk from COVID-19.

On the other hand, the start of the pandemic caused a temporary 10% drop in the annual number of persons who could be accepted into Homeward Bound permanent programs due to public health restrictions and social distancing requirements in our shelter services.

In the years prior to the pandemic, some of our major program additions have included the 26-bed Housing at Last, 33-bed Family Place, 35-bed Oma Village, 29-bed Families First, and 12-bed King Street Housing.

Meanwhile, Homeward Bound's annual agency budget has grown every year without fail, for example from just over \$9 million in 2019-20 to just over \$13 million in 2022-23. This reflects strong and steady confidence and support from government, foundation, and private funders and contributors and continued growth of our rental and social enterprise revenues.

Have there been any recent expansions or cutbacks in activities and/or budget? If so, please explain.

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If applicable, what is the organization's standing with licensing or other accreditation authorities?

N/A

How does your organization verify client income?

Homeward Bound verifies client income initially and a least annually thereafter to determine eligibility and to determine the client’s monthly occupancy fee towards a housing unit. Occupancy fees are 30% of the client’s monthly adjusted income. Therefore, to calculate the client’s monthly adjusted income, clients must complete an income verification checklist and submit all supporting documentation i.e. paycheck stubs, General Assistance/General Relief statements, Social Security Disability Income statements, Supplemental Security Income statements, and/or benefits documentation from the Veterans Administration. After the income verification checklist and supporting documents are collected and reviewed, a Homeward Bound finance associate uses the HUD Income & Resident Rent Calculation Worksheet to determine the client’s rent contribution.

This process is repeated annually in line with requirements of the CoC Interim Rule. As a lease agreement condition, clients must agree to supply the information or documentation necessary to verify their income. Also, clients must provide the landlord with information at any time regarding changes in income or other circumstances that may result in changes to the client’s rent contribution.

General Project Information

Project Name

Novato Veterans and Workforce Housing

Project Address

826 State Access Road
Novato, California, 94949

Assessor’s Parcel Number (APN)

APN 157-970-07

Funding Requests

Which funding source(s) are you seeking for this project? Please refer to the NOFA for a description of each funding source and eligible project types. Those applying for HOME-ARP funds are highly encouraged to apply for HTF/PLHA funds as well.

HTF/PLHA

HOME-ARP

CDBG Housing

HTF/PLHA Amount Requested

\$2,358,030

HOME-ARP Amount Requested

\$2,467,167

CDBG Housing Amount Requested

\$600,000

CDBG/HOME-ARP applicants only: Is this project located in a Special Flood Hazard Area, and therefore requires flood insurance?

No

Project Details

Scope of Work: Describe the proposed project, including details such as property characteristics, proposed use of funds, and number of housing units involved. Explain how the project will benefit the community.

This project will develop veterans and workforce housing on the 2.8-acre “HUD Parcel” site in the former Hamilton Army Airfield in Novato. This future housing will provide 50 critically needed new homes, including 24 affordable one-bedroom units of permanent supportive housing for veterans in a two-story apartment building, and 26 one-bedroom rental units of workforce housing in an adjacent and similarly designed two-story structure. The site will also include a job training facility. With the Phase 1 veterans units essentially fully funded, the \$5.425 million requested will be used for eligible costs for developing the Phase 2 workforce housing units.

Located next to existing housing programs operated by Homeward Bound, this new development will replace three former warehouses and complete a coherent campus of services to address homelessness in Marin. The Affordable Housing Fund and Permanent Local Housing Allocation (HTF/PLHA) and HOME Investment Partnership American Rescue Plan (HOME-ARP) funding requested will be used for construction of the housing and related improvements. The Community Development Block Grant Housing (CDBG Housing) funding requested will be used only for eligible costs such as off-site improvements (e.g., utilities).

The workforce housing units will provide critically needed affordable housing for six small families and 20 single adults who are exiting homelessness and entering or reentering the labor force. The family housing will be grouped on the ground floor on the private back of the building.

The veterans housing units will offer affordable and dignified living spaces for all remaining unhoused veterans in Marin, making our community one of the first in California to ensure every former service member has a place to call home.

Tenants will receive onsite case management and connections to resources such as public benefits, employment, medical care, legal aid, childcare, or transit. In addition, residents will have access to all the amenities of Homeward Bound’s adjacent New Beginnings Center, including 24/7 staffing and daily meals. The project is conveniently located within a half mile to a SMART train station, multiple bus lines, a library, grocery store, and parks.

Building on the existing structural landscape of Marin, this project represents a unique opportunity to replace disused buildings with vibrant new homes and fulfill the decades-long intentions of a Novato reuse plan to develop the property for the purposes of serving people without housing.

With a 55-year renewable \$1.00 ground lease approved by the City in 2019, Homeward Bound has engaged with long-time local architectural partner, Fredric C. Divine Associates. Key milestones reached thus far include holding public neighborhood meetings to gain community input, and approval of exterior design and landscape plans for the site. Most recently, Homeward Bound broke ground on the veterans housing after securing Novato City Council approval of a CEQA clearance, precise development plan, and design review for the entire project (veterans and workforce housing and job training facility). We look forward to completing construction of the veterans housing by the end of 2024 and the workforce housing at latest by the end of 2025

Describe the property’s history leading up to this request. Include when the organization acquired/will acquire the property, any previous requests for County funding, attempts to secure other financing, etc.

The site is part of the former Hamilton Army Airfield, which was closed by the military in 1975. Under the Hamilton Reuse Plan, the base was turned over to the City of Novato and is now a planned community with a broad array of residential, commercial, open space, and civic uses.

As a decommissioned military base, HUD approved the Hamilton Reuse Plan for this site under the McKinney Act, which included a Legally Binding Agreement that the HUD Parcel be designated for homeless service uses, including housing, services, supportive employment, and job training.

The HUD Parcel is now occupied by three dilapidated structures built prior to 1952 by the military for use as barracks. These old buildings will be demolished to make way for the new veterans housing, workforce housing, and job training facility.

While the vision for this project has long existed, work began in earnest in 2018, when Homeward Bound asked the City for a ground lease for the site and requested Fredric C. Divine Associates to develop architectural plans. Since then, key milestones that have been reached include:

- 2018 – 2020 – Homeward Bound held public neighborhood meetings to gain community input on the initial project design and made revisions according to the input.
- 2019 – 2020 – Homeward Bound submitted an application for design review, participated in a design review process, and made revisions according to the input.
- December 2019 – the Novato City Council approved a 55-year \$1 ground lease of the HUD parcel to Homeward Bound.
- January 2020 – the Novato Design Review Commission moved to forward to the Planning Commission a recommendation of approval of exterior design and landscape plans
- June 2020 – the Novato City Council voted to grant the project in lieu housing funds of \$750,000 in to off-set development fees.
- 2020 – 2022 – Homeward Bound has secured more than \$14.4 million to complete Phase 1, which includes demolition, underground facilities and ground preparation, off site facilities, and the veterans housing: This includes: \$3 million short-term loan from Novato, \$4 million from the State of California 2021 Budget, \$3 million from the State Veteran Housing and Homelessness Prevention (VHHP) program, \$2.2 million from Marin Community Foundation (MCF), \$750,000 from the City of Novato, \$526,526 in HOME funds, \$250,000 in CDBG funds, \$966,528 from two years of Marin County Affordable Housing Trust awards, and more.
- August 23, 2022 – Novato City Council approved environmental clearance, precise development plan, and design review, setting the stage for the ground breaking.
- January 2023 – the U.S. Department of Housing and Urban Development approved NEPA review.

Describe any nearby amenities, such as parks, public transportation, grocery stores, health care facilities, schools, childcare, libraries, parks/open space, etc. that residents of the project are/would be able to use.

A key benefit of the project is that it is adjacent to Homeward Bound’s main campus, where many services are already provided onsite. For example, Spahr Center, Ritter Center, AA, and NA all provide substance abuse recovery services or groups on site. The Fresh Starts Culinary Academy and other training opportunities are located on campus, and the NBC cafeteria provides three free meals per day. A full-time Housing Case Manager works exclusively with veterans staying at the New Beginnings Center (NBC) and the HUD VASH program has a caseworker office in the NBC. As such, the project will be part of what is truly a center for homeless services, and tenants of the project will be able to timely and easily obtain needed services.

The site is served by the nearby Hamilton SMART station, as well as 3 different transit lines within .3 miles (the 49, 251, and 257). And Homeward Bound provides bus vouchers. In addition, there are:

- One grocery stores within .5 miles - Safeway and another within 1 mile - Nugget Market
- One shopping center within .5 miles – Hamilton Marketplace and another within 1 mile – Pacheco Plaza
- Three parks within 1 mile – Clark Blasdel Community Park, Bay Trail/Hamilton Wetland Preserve, and Loma Verde Preserve
- Two medical clinics within .5 miles – Sutter Health Walk-In and Action Health Clinic
- Two schools within .5 miles – Novato Charter (K-8) and Hamilton Middle School, and another within 1 mile – Loma Verde (K-5)
- Two childcare/preschool programs within .5 miles – Hamilton Montessori (toddler – K) and North Bay Children’s Center (toddler, preschool, and after school), and one within 1 mile – Novato Children’s Center (ages 3 – 8).
- Four public recreation facilities within 1 mile – South Novato Library, Hamilton Community Pool, Hamilton Field History Museum, and Marin Museum of Contemporary Art.

Select the known environmental issues of the proposed project site, and/or adjacent properties if relevant.

No known environmental issues

Notes or clarifying information on environmental issues:

The project has completed a Phase 1 Environmental Site Assessment (ESA), and no issues were found. The project has received both CEQA and NEPA clearances.

Have you begun any state or federal environmental review procedures for the proposed project?

Yes

Who is the staff member that will supervise and manage the proposed project? Describe their past experience with project management.

Co-Chief Executive Officer Paul Fordham is the lead project manager for development of the housing and job training facility, a role he fulfilled for the prior Jonathan’s Place, Casa Buena, Oma Village, King Street Senior Housing, and Next Key Center efforts. Paul coordinates the project and interfaces with all key players, including Novato planning officials, County program staff, and the design, construction, and development teams. As such, this includes Homeward Bound’s long-time architectural services provider, Fredric C. Divine Associates, a role the firm very successfully carried out for Jonathan’s Place and King Street Senior Housing; and Homeward Bound’s Board, leadership, and development team (including consultant Tony Gardner) who are all working together on fundraising and have demonstrated past success with the Jonathan’s Place, Oma Village, King Street Senior Housing, and Next Key Center capital campaigns.

Once the project is up and running, Chief Operating Officer LaSaunda Tate will be the lead for operation of the housing, including marketing and occupancy, resident and community relations, maintenance and repair, program policy development and compliance, program policies and staffing. LaSaunda has 15 years of experience including overseeing operations of each of Homeward Bound’s 20 unique residential programs. Chief Programs Officer Anna Hurtado will be the lead for programming and supportive services. Anna also has 15 years of relevant experience and currently oversees programs and services for all adult, family, veteran, and mental health programs. Finally, Chief Equity Officer Shikira Porter will lead critical activities toward achieving justice, equity, diversity, and inclusion throughout the program.

Will the project involve hiring an external property management company?

No

If awarded funding, you will need to draft and submit an Affirmative Marketing Plan for this project. The plan would describe how you will market the project to different groups of people based on protected characteristics such as race, color, national origin, religion, sex (including sexual orientation and gender identity), familial status, and disability. Please refer to the Affirmative Marketing tab of the [Federal Grants website](#) for more information.

Describe any prior experience with affirmative marketing or similar initiatives.

Homeward Bound has many year of experience affirmatively marketing its housing and shelter openings. As a result, the agency has made significant progress in serving traditionally underserved, underrepresented communities. For example, in the 2022 program year 25% of Homeward Bound clients were Latinx, compared with 22% in the countywide homeless population (Marin 2022 point-in-time-count) and 19% in the overall county population; 22% of Homeward Bound clients were African American compared to 22% in the countywide homeless population and only 2% in the overall county population; and 7% of Homeward Bound clients were Mixed Race/Other compared to 5% in the countywide homeless population and 11% in the overall county population. Meanwhile, only 41% of Homeward Bound clients were White compared to 65% in the countywide homeless population and 68% in the overall county population.

Historically, Homeward Bound has affirmatively marketed its programs by communicating all openings directly to staff partner agencies that extensively serve traditionally underserved, underrepresented

communities, such as the Marin City Development Corporation, Canal Alliance, Marin Asian Advocacy Project, Spahr Center, Community Action Marin, St. Vincent de Paul Society of Marin, Marin Center for Independent Living, Vivalon, and Marin County Health and Human Services. In addition, the agency regularly communicates its openings during meetings of the Marin Alliance to Solve Homelessness and Marin Volunteers Active in Disasters (VOAD), both of which include representation from the San Rafael Canal area, Marin City, and West Marin. Finally, Homeward Bound announces its new shelter and housing opportunities through the agency website, weekly newsletter, and through Facebook and Instagram. Together these are effective at reaching members of underserved, underrepresented communities, including, importantly, persons served in Homeward Bound's shelters who are looking for stable housing.

More recently Homeward Bound has conducted research to identify tailored means of advertising, including newspapers, radio stations, TV stations, internet and social media, and bulletin boards best suited to reaching African American, Latinx, and Disability communities, and has identified specific affirmative marketing evaluation and training approaches. With this information, Homeward Bound has developed a number of written Affirmative Fair Housing Marketing Plans, including one for this project. It is important to note that since all Homeward Bound's housing referrals now come through the Marin Coordinated Entry System (CES), we are in part dependent on the effectiveness of Marin CES's affirmative marketing. Homeward Bound has been a key part of the CES Community Redesign process aimed at making the process more inclusive and eliminating racial and gender bias resulting from the use of the original VI/SPDAT assessment tool. Homeward Bound led the Family CES redesign and is now participating in Adult CES redesign. A key goal for Homeward Bound is to ensure that the housing referrals we receive are in whole as diverse as our own shelter populations and the overall Marin homeless population.

All projects funded by HUD programs must Affirmatively Further Fair Housing. This is defined as combating housing discrimination and taking meaningful actions to overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to housing opportunities based on protected characteristics: race, color, national origin, religion, sex (including sexual orientation and gender identity), familial status, and disability.

CDBG/HOME-ARP applicants only: How will this project Affirmatively Further Fair Housing?

This project will accept referrals through the Marin CoC Coordinated Entry System (CES), and thus will benefit from the CES program's affirmative marketing designed ensure that all people have fair and equal access to CES and housing and will not be "steered" toward any particular housing program or neighborhood due to factors such as race, ethnicity, national origina, disability, sex, presence of children, or membership in any federally protected class.

Moreover, Homeward Bound will take proactive steps intended to address longstanding patterns of segregation, discrimination, and disinvestment, including the development and implementation of an Affirmative Marketing Plan specific to this new housing opportunity, and by offering integrated housing in Marin outside an area of racially and ethnically concentrated poverty.

Homeward Bound's Chief Operations Officer, LaSaunda Tate, will be the lead on affirmative marketing. Outreach efforts will include marketing intended to draw the attention of these groups such as notices, media, and flyers placed via local Spanish-language websites, newspapers, or radio stations; community television stations, circulated with partners such as Vivalon and local Veterans Administration liaisons, bulletin boards at community centers, libraries, and Homeward Bound's shelters; or through social media posts on agency Facebook and Twitter accounts.

Housing information and application materials will be provided for Limited English Proficiency persons to ensure meaningful access, including bilingual staff who will provide verbal interpretation and written translation, as well as translated housing program contracts, flyers, and policies.

Community contacts for each targeted marketing population designated as least likely to apply for this housing development will include agencies with the ability and trust to influence such groups, including Marin City Development Corporation, Canal Alliance, Community Action Marin, St. Vincent de Paul Society of Marin, Marin Asian Advocacy Project, Marin Center for Independent Living, Vivalon, and Marin County Health and Human Services.

All marketing materials will be inclusive, culturally sensitive, and representative of the demographics of

the target groups identified in the Affirmative Marketing Plan, together with the supportive service populations this housing is designed to serve. The Equal Housing Opportunity logo will be included on all notices, lease documents, and marketing materials, and the HUD Federal Fair Housing poster will be displayed in the property office.

Future and continued marketing efforts following initial lease-up will be carried out to maintain occupancy goals in accordance with the Affirmative Marketing Plan. A staff data analyst will collect and report on project and organizational demographics to identify any population-based disparities in services provided and client outcomes, and inform steps needed to eliminate disparities and advance goals to affirmatively further fair housing.

Homeward Bound is committed to affirmatively furthering fair housing. The responsibility to promote nondiscrimination applies to this project and all Homeward Bound's residential programs. Homeward Bound complies fully with all federal, state, and local nondiscrimination laws, adhering to rules and regulations governing fair housing, civil rights, and equal opportunity in housing, which includes prohibiting discrimination in housing on the basis of race, color, religion, sex, national origin, age, familial status, or disability.

Describe any past community engagement activities for this project, and future plans for community engagement.

As part of the homeless facilities component of the Hamilton Reuse Plan, Homeward Bound's facilities at Hamilton Airfield have undergone an extensive public process with many meetings (going back to the mid-1990s), during which neighbors and the public have had ample opportunity to comment on and influence building and program design. As a result, Homeward Bound has successfully engendered very broad community support for its activities at the former Hamilton Airfield, and the homeless services "campus," is fully aligned with the community, social, economic, and aesthetic goals set forth in the City's General Plan and Hamilton Reuse Plan.

During the design review process, the community fully engaged around the new housing being added to the campus. Thus, on April 25, 2018, Homeward Bound held a community outreach kick-off meeting with our Hamilton neighbors, three City Council members, two staff from Senator McGuire's office, VA staff, and County staff. Then, on November 19, 2019, Homeward Bound held a neighborhood meeting at the Next Key Center to surface neighbors questions, concerns, and comments. These meetings showed strong community and neighborhood support for the project, and all comments were considered in preparing and revising the project plans. The result benefited from the agency's hard work to develop excellent relationships with the Hamilton neighbors during the 30+ years we have operated programs at the former Hamilton Airfield.

Integration of the residents with the broader community will be a key goal of all project partners. Through its "good neighbor" policy, Homeward Bound will create opportunities for tenants and neighbors to meet and interact around common interests and concerns. Homeward Bound will address any neighbor complaints within 10 days. The site will be robustly staffed to handle issues whenever they arise and staff will work closely with neighbors to quickly resolve any issues.

Homeward Bound intends to have monthly tenant councils for each building that will be led by the tenants themselves. The goal will be to create a space for residents to connect, share resources and experiences, and encourage strong community. The tenant councils will select their own officers, will plan outings and activities, will hold "tenant circles" to discuss chores, neighbor relations, address conflicts, and build relations with staff; and will engage in volunteer and learning activities together.

Demographics and Unit Information

In the table below, enter the existing or anticipated number of units based on income level and bedroom count. Refer to the [Current Marin County Income Limits](#) to determine income level.

Anticipated Unit Count by Bedrooms and Income Level

	Extremely Low	Very Low	Low	Moderate	Market Rate	TOTAL UNITS
Studio	0	0	0	0	0	0
1 bed	0	50	0	0	0	50
2 bed	0	0	0	0	0	0
3 bed	0	0	0	0	0	0
4 bed	0	0	0	0	0	0
Other	0	0	0	0	0	0
TOTAL UNITS	0	50	0	0	0	50

Notes or clarifying information on the unit count:

24 units for veterans and 26 units for adults and small families exiting homelessness and entering or re-entering the labor force.

In the table below, enter the demographics of the people who live (or will live) in the proposed housing project. If unknown, use the demographics of households within similar existing Marin complexes as the proposed project, within the organization's purview. Specify the number of Hispanic/Latino residents in its stand-alone column. The "Total" column must include the number of Hispanic/Latino residents as part of the sum.

Are these numbers specific to the proposed project, or to a similar existing Marin complex?

Proposed project

Demographic Information

	Total Number of Persons	Persons Identifying as Hispanic/Latino
White	33	9
Black/African American	16	0
Asian	1	0
American Indian/Alaskan Native	1	1
Native Hawaiian/Other Pacific Islander	1	0
American Indian/Alaskan Native & White	0	0
Asian & White	0	0
Black/African American & White	0	0
American Indian/Alaskan Native & Black.African American	0	0

	Total Number of Persons	Persons Identifying as Hispanic/Latino
Other Multi-Racial	4	0
Other/Not Disclosed	0	0
TOTAL (Unduplicated)	56	10

Fill in a number for each of the fields below. For new construction, or if you are unsure, please put 0.

Families

6

Female-headed households

15

Households that include person(s) with a disability

23

Notes or clarifying information on demographics:

The six families will be small (parent and infant or small child) and will be grouped in family section of the workforce housing - six units on the ground floor in the private back of the building.

Project Planning

Select the current phase of the proposed project.

Planning

Describe the project timeline and specify a real or estimated completion date for each milestone below. Add/explain any additional milestones as needed.

For acquisition projects:

For new construction and/or rehabilitation projects:

Define scope of work/finish design

Tuesday, August 23, 2022

Complete planning and environmental review

Tuesday, August 23, 2022

Release bid package

Saturday, December 1, 2018

Select contractor

Saturday, January 5, 2019

Finalize contract

Tuesday, January 8, 2019

Obtain building permits

Thursday, March 30, 2023

Start construction

Friday, March 31, 2023

Complete construction

Monday, December 1, 2025

Additional Milestones for New Construction and/or Rehabilitation Projects

Milestone	Estimated Completion Date
Groundbreaking for Phase 1 Veterans housing held	11-10-2022
Building permit for Phase 1 Veterans Housing expected	03-30-2023
Building permit for Phase 2 Workforce Housing expected	07-30-2023
Construction phase for Phase 1 Veterans Housing	12-01-2024
Fundraising completed for Phase 2 Workforce Housing	12-01-2024
Certificate of occupancy and doors opened for Phase 1 Veterans Housing	12-31-2024
Construction phase for Phase 2 Workforce Housing	12-01-2025
Certificate of occupancy and doors opened for Phase 2 Workforce Housing	12-31-2025

Explain any additional milestones for New and/or Rehabilitation Projects below:

Dates above are estimated. Additional milestones are added to reflect the two project phases:

Phase 1 veterans housing and site and off site work
Phase 2 workforce housing.

CDBG/HOME-ARP applicants only: Describe any flexibility regarding your project's start/completion date.

Phase 1, which includes demolition, underground facilities and ground preparation, off site facilities, and the veterans housing, is funded and on track for completion by the end of 2024. The Phase 2 workforce housing will be considerably easier since all the on- and off-site preparation work will already be done. Therefore, Phase 2 will be completed no later than the end of 2025 and possibly considerably earlier, depending upon funding.

Will you be seeking Project Based Section 8 Vouchers for this project?

Yes

Please be aware that if Project Based Section 8 Vouchers (PBV) are committed to the project, the environmental review process and subsidy layering must be completed before the acquisition is complete or construction commences. Actions taken prior to PBV being committed are not subject to this requirement.

Describe the type of site control that your organization has for the proposed property. If this request includes funds for acquisition, summarize the acquisition terms, price, contingencies, and conditions.

Homeward Bound has a 55-year renewable \$1.00 ground lease for the HUD Parcel approved by the City of Novato (the landowner) in 2019.

Please describe in detail the entitlements and permits that will be required, and those already obtained. For example, Design Review, Master Plan, Zone Change, General Plan Change,

Coastal Permit, etc.

As of this date, the project has achieved all the entitlements and approvals needed for Phases 1 and 2 of the project, except for building permits. The following provides details.

The very first step was HUD's approval of the Hamilton Reuse Plan under the McKinney Act, which included a Legally Binding Agreement that the HUD Parcel be designated for homeless service uses, including housing, supportive employment, and job training.

No zoning changes were needed as the project is an allowable use under the existing Planned District designation.

No general plan changes were required. On November 19, 2019, the Planning Commission determined that the ground lease and the proposed uses are fully consistent with the Novato General Plan under the existing Community Facilities general plan designation.

The project was subject to design review. As mentioned earlier, Homeward Bound submitted a complete application for design review and has successfully engaged with Novato Design Review Commission, Novato Planning Commission, City staff, and the public in the design review and approvals process. As a result, on January 15, 2020, Design Review Commission moved to forward to the Planning Commission a recommendation of approval of exterior design and landscape plans for the site.

The project was also subject to a Precise Development Plan as required for all projects in a Planned District zone. Homeward Bound submitted the Precise Development Plan application and engaged in the detailed design review, Planning Commission, and City Council review and approval process. On August 23, 2022, the Novato City Council provided an environmental clearance and approved the precise development plan and design review, setting the stage for the ground breaking.

Finally, Homeward Bound has submitted an application for a building permit for Phase 1 of the project and expects to pull the building permit by March 30. Homeward Bound will then prepare an application for the Phase 2 building permit as soon as possible.

Describe any contact with the planning staff at the relevant government jurisdiction, and any specific feedback they provided.

Homeward Bound is grateful to have worked closely on the design review, entitlement, environmental review, and ground lease process with City Manager Adam McGill, Community and Economic Planning Director Vicki Parker, Planning Manager Steve Marshall, Senior Planner Hans Grunt, and Planner II Vivek Damodaran. City staff have been true partners on the project; have provided clear and comprehensive information, feedback, and explanations on the planning requirements that had to be met and project information needed; and have coached and guided us through the ground lease, design review, and entitlement approval process at the Design Review Commission, Planning Commission and City Council levels. Without the support of planning staff, the project would not be as far along as it is.

Some of the key feedback to date has had to do with the ground lease terms and the exterior design and landscape features of the site. Based on this feedback, Homeward Bound agreed to include the shared drainage easement language in the lease, and twice revised the project plan documents to meet Design Review Commission and staff comments regarding exterior appearance and landscaping.

Identify all applicable accessibility laws and specific accessibility requirements that must be met in the design of the proposed project.

Applicable accessibility laws include the federal Fair Housing Act, federal Americans with Disabilities Act and Section 504, California Accessibility Act, and California Building Code accessibility standards. Accessibility features for the project include:

- Eight disabled access parking spots
- All walkways, entrances, doorways, doors/hardware, ramps, drinking fountains, rails, stairways/landings, and appropriate signage (including raised braille) will meet accessibility standards
- All ground-floor units will be fully accessible.

In addition, all residents will be provided with a reasonable accommodation form when requesting additional support for disability related matters. Homeward Bound has a Section 504 Officer, LaSaunda Tate, who reviews all requests and responds to the resident within the allotted timeline. Applicants are made aware of Homeward Bound's Notice of Rights to a Reasonable Accommodation during the intake

process and when signing their lease. The notice informs each client that at any stage in the housing process they may request a reasonable accommodation. LaSaunda conducts an interagency Reasonable Accommodation training once a year and requires all housing staff to attend Fair Housing Advocates of Northern California's Legal Obligations and Rights of Housing Providers Under Federal and State Fair Housing Law for Applicants and Tenants with Disabilities Training.

Financing Plan

What is the status of all proposed project funding sources as of the date of this application?

Homeward Bound already has permanent commitments totaling more than \$14.4 million and a short-term City of Novato construction loan of \$3 million (see Sources and Uses and commitment attachments), which is largely enough to complete development of Phase 1 of the project and get started with Phase 2. We are moving rapidly forward with our major Project Homekey request, Capital Campaign, and foundation and corporate requests, and are on track to to achieve sufficient commitments to complete Phase 2 development by the end of 2025.

What is the timing and likelihood for obtaining commitments of anticipated funding sources?

Homeward Bound will submit its application to the County to be a Project Homekey, Round 3, development sponsor by the deadline of March 22, 2023 and expects to receive a notification of the result by March 29, 2023. The State has not yet released the State Project Homekey Round 3 RFP. However, they have forecasted release in March 2023, and based on prior RFPs, we can guess that applications will be due around July 2023 and that awards will be announced within 45 days and standard contracts issued on a rolling basis after completion of all documentation. We believe there is a strong likelihood we will be successful given the eligibility, strength, and readiness of the project.

Finally, our Capital Campaign for individual contributions and requests to additional foundations and corporate donors are ongoing and should be complete no later than December 2024, and probably earlier. Our expectation of success is based upon our prior track record of obtaining individual contributions, foundation grants, and corporate donations for similar capital development projects, such as Jonathan's Place, the Next Key Center, and Oma Village.

In the event that any funding sources are not obtained or are committed at lower levels than requested, what alternatives will be pursued?

If we do not receive all the funds we have requested, or if committed amounts are lower than expected, we will identify and apply in 2023 and 2024 for additional federal, State, foundation, and private sources. One alternative would be to increase our planned Project Homekey Round 3 request by the amount needed to fill the gap. Another would be to apply for one-time CoC capital development funding that HUD plans to announce in 2023. We would also consider using conventional financing for long-term gap filling but want to keep the project affordability level high by avoiding the need to carry mortgage payments into the future.

For each item in your project budget, to be attached to this application, please explain how the budgeted amount was derived, whether costs are estimated or bid, and any other relevant information that justifies the budgeted expense (e.g., cost per square foot, percentage of other costs, estimated number of work hours).

The project general contractor, McDevitt Construction, provided the construction costs as estimates. The overall costs for the housing are within area expectations considering the cost of labor, materials, and professional fees in the Bay Area, as well as considerable costs needed for demolition of the existing building and site work. The following applicable cost categories are within these industry standards:

- 6% Design
- 2% Supervision
- 1% Land survey
- 5% Hard cost contingency

- 10% Soft cost contingency
- 6% Project administration
- 6% Other developer costs, e.g., capital campaign

The general contractor's combined general requirements, overhead, and profit are below 14%, which meets California Department of Housing and Community Development feasibility guidelines.

Is your organization receiving any other Marin County funding for this project?

Yes

Please describe. Include a brief overview of the goals and accomplishments achieved through this funding.

We are thrilled that Marin County has already committed \$1,743,054 to the project including:

- \$459,528 – 2021 Marin County Affordable Housing Trust/PLHA
- \$507,000 – 2022 Marin County Affordable Housing Trust/LHTF
- \$526,526 – 2021 HOME
- \$250,000 – CDBG

The County's ongoing partnership and support has been critical to the success of this effort. Key goals and accomplishments have included: (1) directly helping fill the funding gap; (2) indirectly helping to fill the gap by signaling County support for the project to other important funders, such as MCF and the State of California; and (3) strengthening the County and Homeward Bound's long-term collaboration around joint goals for providing affordable housing and ending homelessness.

Does your organization have unspent funds that were previously awarded by the County (for any project)?

Yes

What is your timeline for expending the fund balance?

Homeward Bound does have outstanding County affordable housing trust, HOME, and CDBG grants for this project which have not been spent but are on track to be fully expended during the construction phase. We expect these committed funds to be fully used during Phase 1 of construction, i.e., no later than December 2024.

Over the years, Homeward Bound has received various CDBG and HOME grants from Marin County, for example for development of the Next Key Center, King Street Housing, Oma Village, and Jonathan's Place, and for repairs to the New Beginning Center. All of these previous awards have been fully expended.

Finally, Homeward Bound regularly receives County funding for ongoing services and operations of emergency shelter and housing programs. All such prior grants have been fully expended and current grants are on track for full expenditure with their contract timelines.

CDBG/HOME-ARP applicants only: Describe your organization’s experience with administering federal grant programs. What experience do you have with Davis-Bacon prevailing wage and procurement requirements?









Homeward Bound has extensive and long-term experience administering federal grant programs, including Continuum of Care (CoC), Emergency Solutions Grants (ESG), and VA Grant Per Diem (GPD). Homeward Bound has been awarded ESG funds nearly every year for family shelter. Our organization has re-applied again this year for our annual VA GPD funding, which averages approximately \$200,000 for veteran-designated transitional housing. Homeward Bound is familiar with Davis-Bacon prevailing wage. In 2017, we complied with Davis-Bacon requirements for \$80,000 in CDBG funds to replace the New Beginnings Center floors.

Describe your ability to complete financing for this project with a subset of units deed restricted at 30% of the Area Median Income (AMI). How many units can your project support at 30% AMI?

All future tenants will have project-based vouchers or HUD-VASH. This creates a viable option for offering affordable rents calculated at no more than 30% of a household’s income. All 50 units can be supported at 30% of AMI, and the subsidy income is enough cover operating and maintenance costs of the facility as detailed in our One-Year Operating Budget and 20-Year Pro Forma. Homeward Bound already has experience launching and managing a program based on this model - our King Street Senior Housing community in Larkspur has project-based vouchers for all units. As an added benefit of a project-based voucher program, if a tenant chooses to leave the program for a unit of their choosing elsewhere, they may be eligible for a tenant-based voucher to continue receiving assistance.

Attachments

Please closely review the Notice of Funding Availability (NOFA) for instructions on which documents you must attach. The County requires specific attachments for each funding type (HTF/PLHA, HOME-ARP, CDBG Housing). Please label your attachments in this manner: “2023-24 [Document Name] for [Organization Name]- [Project Name].”

 2023-24 Board of Directors fo....pdf	 2023-24 CDBG Housing Bud... .xlsx
 2023-24 Current Year Operati... .pdf	 2023-24 FEMA Flood Map HU....pdf
 2023-24 Final Excel Spreads... .xlsx	 2023-24 Financial Statement... .pdf
 2023-24 HUD Parcel Site Con... .pdf	 2023-24 IRS Tax Exemption L....pdf

Certification

Please review your responses above for accuracy.

Name of Person Completing this Application

Mary Kay Sweeney

Title of Person Completing this Application

Co-Chief Executive Officer

By checking this box,

I hereby certify that the information in this application is true and accurate to the best of my knowledge.