Win6 Village SANTA CLARA, CA CONNECTED URBAN FARM BASED HOUSING

Created 5/20/14 by Middlebrook Gardens and Kirk Vartan, NOFA Edited 6/03/14 - v1.2

PROJECT DESCRIPTION

The goal of this project is to design and obtain funding for the 6-acre site adjacent to SummerHill homes, referred to as the Winchester 6-acre site (Win6). By mixing low-income senior housing, market rate, and affordable housing with urban agriculture and green space, Win6 will to create a healthy, diverse community. Win6 will be representative of Santa Clara County's progress and economic development over the past two centuries, first as the Valley of Hearts Delight then as Silicon Valley. The architecture and land use will reflect the juxtaposition of these two distinct and rich historical periods. The design will feature modular architecture and focus on sustainable design and construction, enhanced with innovative technologies representing Silicon Valley.

Win6 will combine dense housing with green space. It will incorporate a minimum of 165 low-income senior units, and ideally include a total of 500 units, which will be split 10-20% two-bedroom units, with the remainder a combination of one-bedroom units and studio apartments. The site will include private gardens, orchard trees, regional native plantings, and a public urban farm. The urban farm will be extensive enough to provide food for the residents and the on-site restaurant/cafe as well as a year round farm stand. The urban farm will foster healthy, active lifestyles and educational opportunities for the residents and the surrounding communities. A key element of the site and urban farm is a public, multi-use gathering space /plaza that functions as a shared community resource. Win6 will attract new demographics and consumers by connecting to the Westfield mall, Santana Row, Century Theater complex, and the Winchester Mobile Home Park. This connection to the larger area will be achieved through the use of themed and planted pedestrian bridges and walkways that improve traffic circulation in this busy area.

Mission: To develop the Win6 Village as a pilot project using a sustainable land-use model to combine dense housing, urban agriculture, and connectivity that others can easily replicate.

The work will be lead by Middlebrook Gardens in conjunction with an architect, a developer, and the input of the community and partner non-profits. Combining public open space and private mixed housing allows the needs of the area to be addressed and encourages broad support for this project.

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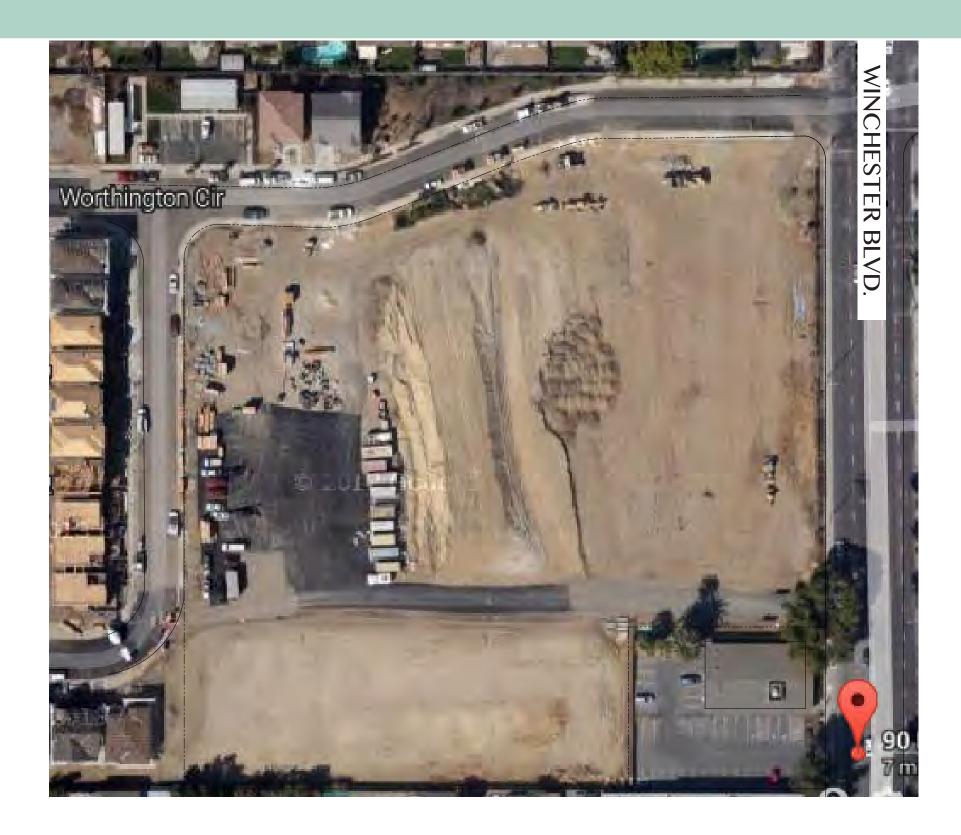
EXISTING CONDITIONS

AERIAL VIEW





EXISTING SITE PLAN





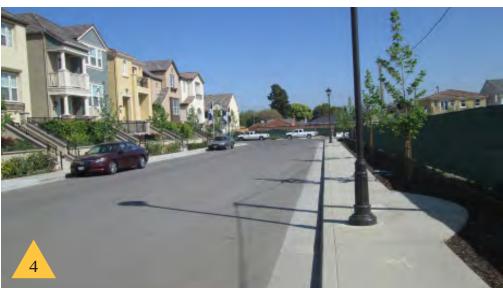
SITE PHOTOS











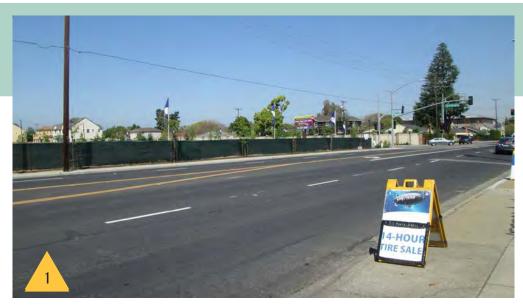




1.3 6/03/14, Created by Middlebrook Gardens and Kirk Vartan, NOFA

SITE CONTEXT













1.4, 6/03/14, Created by Middlebrook Gardens and Kirk Vartan, NOFA

INSPIRATIONAL IMAGES

ARCHITECTURE MODULAR BUILDINGS

Benefits of modular apartment buildings

- Lower cost
- Provides opportunity for rooftop terraces
- Successful for high density spaces
- Eases construction process and reduces construction time
- More efficient construction process makes for less waste
- Easier to use recycled materials
- Easier quality control
- Upcycling











ARCHITECTURE LOW-INCOME HOUSING

Factors for successful low incoming housing

- Efficient use of space
- Communal space
- Community resources onsite
- Energy efficient/sustainable design
- Design saftey and user accessability (e.g. grab bars for showers)
- Onsite/nearby job opportunities
- Extensive and accessible green space
- Opportunities for contemplation













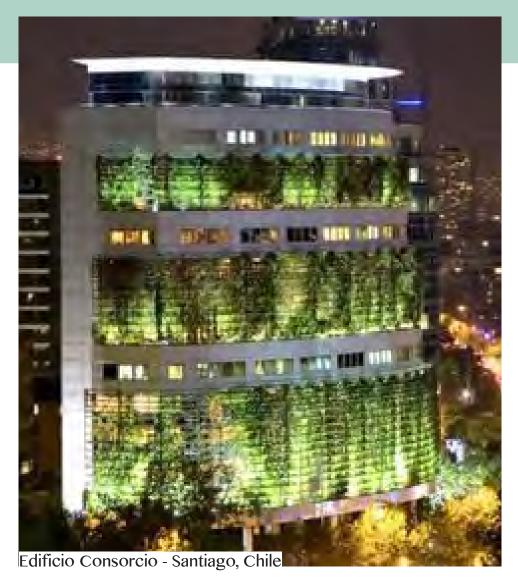
ARCHITECTURE SUSTAINABLE BUILDINGS

Sustainable building elements

- Green roofs
- Green walls
- Solar
- Zero emissions design
- High efficiency design
- Passive heating/cooling
- Rainwater capture and dispersion
- Wind
- Geothermal









GREENSPACE URBAN AGRICULTURE

Urban farming...

- Improves food accessibility
- Increases physical activity
- Provides educational opportunities
- Increases green space in urban areas
- Builds community
- Reduces our carbon footprint
- Encourages local economic growth
- Food security
- Ecosystem services
- Social interaction
- Ecosystem services
- Improves food nutrition
- Creates activities for residents
- Horticultural therapy







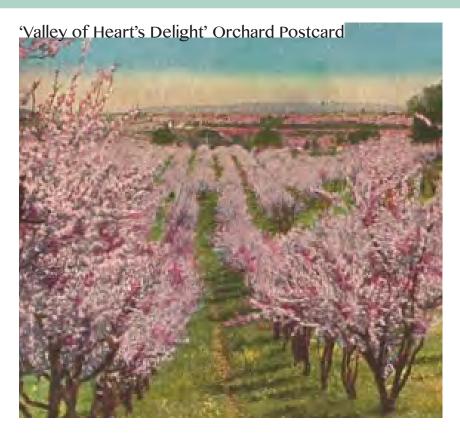




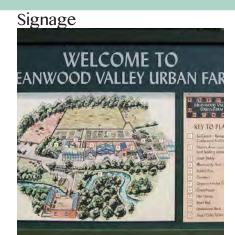
GREENSPACE URBAN AGRICULTURE

Elements of urban agriculture

- High yield crop management and rotation system (e.g. SPIN-gardening)
- Raised beds using repurposed/ recycled materials
- Herb Spirals
- Fruit trees to mimic the orchard of the Valley of Hearts Delight
- Compost and vermiculture
- Food towers and other vertical food production
- Aquaponics (combining fish production with growing plants in water)
- Native/perennial edibles
- Signage and education
- Farm animales
- Greenhouse/Prop Area
- Storage
- Food harvest/staging area (ie packing shed)





















GREENSPACE NATIVE GARDENS

A Native Garden ...

- Restores local ecology
- Reduced water use
- Promotes biodiversity
- Restores soils integrity
- Provides natural habitat
- Improves pollination
- Promotes healthy and wellbeing
- Improves air qualityEliminates the need for fertilizer and pesticide use











Shown: All gardens completed by Middlebrook Gardens in CA

GREENSPACE GATHERING SPACE









GREENSPACE TRADITIONAL FARM STRUCTURES

Traditional Farm Structures include elements such as barns, windmills, and watertowers. Including versions of these structures at Win6 Village harkens back to the vernacular farmhouse architecture of the 'Valley of Hearts Delight'. Combining these structures with modern architecture hilights the rich past and present of Santa Clara County. It is also a form that many seniors in this area can identify with. These can also be educational resources.











CONNECTIVITY GREEN PATHWAYS

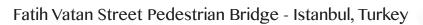








CONNECTIVITY PEDESTRIAN BRIDGES













SITE CONTEXT AND CONNECTIVITY







OPTION 1 PLAN CURVY BUILDINGS





OPTION 2 PLAN RECTILINEAR BUILDINGS



OPTION 2 PERSPECTIVE



OPTION 3 PERSPECTIVE



SITE VISION

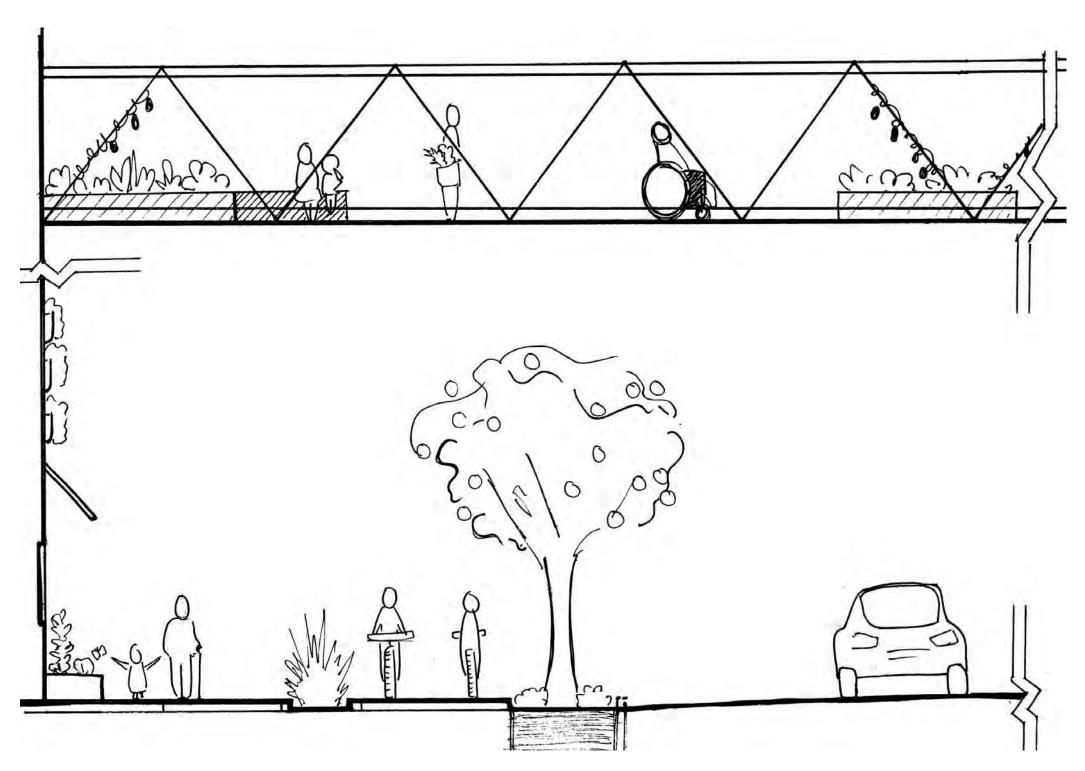


ELEVATION OF WINCHESTER LOOKING NORTH

This **elevation** shows across the site to hilight pedestrian and bike access as well as the level of vegetation that is expected along the perimiter of the site.

The water from the road will run into a 'green street' water filtration curb strip that will incorporate trees with edible fruit. The building facade will be human scale with raised beds in front. There will be a two way bike lane and wide sidewalk for access.

The overpass will be glass metal and wood, and incorporate raised beds and benches that provide the opportunity for art.



WINCHESTER & STEVENS CREEK PERSPCTIVES



WINCHESTER & STEVENS CREEK ALT. PERSPCTIVE



WINCHESTER BRIDGE 3



280 OVERPASS



SOCIAL WELLNESS AND SUSTAINABILITY

Residents and visitors at Win6 Village will experience daily opportunities for social interaction, healthy eating and physical wellness. If they choose, residents can become "Farm Ambassadors" and work in a gardening and/or educational capacity to share their love of healthy food, gardening, and the outdoors. Residents and volunteers can work in the gardens, lead educational tours, attend workshops, harvest and prepare fresh foods and celebrate together. The "Win6 Experience" will enhance the quality of the lives of residents and guests in the realms of food, health, mental well-being, community, education, the environment, accessibility, and economy. Win6 will create opportunities for a quality of life that enables humans and nature to live in productive harmony, while living life to its fullest potential.



NEXT STEPS

- 1. Obtain letter of support from City of Santa Clara.
- 2. Contact architects to consult/ begin concepts for this project. The architects will be able to begin providing rough budget numbers for the project.
- 3. Narrow down inspiration/elements based on feedback from city.
- 4. Develop a more defined list of possible funding sources.
- 5. Provide more visual details. Develop tools for a public presentation.
- 6. Continue engaging neighbors, including community groups, Westfield, and Federal Reality.
- 7. Reach out to potential founders and developers.

POTENTIAL FUNDING SOURCES

- Grants related to revitalization, urban farming, greenspace preservation, low-income/senior housing, mental health, health and wellness, education.
- City of Santa Clara (land)
- Sustainable developers
- State and Federal tax credits
- Local corporate donors
- Open space funding
- Developer contributions (off setting low income or senior needs in other projects)
- Neighborhood retail
- Crowd-funding options
- Open Space Authority SCV tax relief program and give to openspace.
- Westfield and Federal Reality(Valley Fair Mall and Santana Row)
- AARP
- VA (federal)
- Santa Clara University
- Corporate Foundations
- UC System
- City of San Jose
- Tax Exempt Bond Financing

POTENTIAL DEVELOPERS

California developers that made the top 50 National Low Income Housing Developers in 2013

- St. Anton Partners
- Chelsea Investment Corp
- Roem Corp
- Eden Housing
- Satellite Affordable Housing Associates
- Jamboree Housing Corp
- Bridge Housing Corporation
- AMCAL Multi-housing
- National Community Renaissance
- Resources for Community Development
- The John Steward Co
- Abode Communities

Top Sustainable housing developers in California

- Bridge Housing Corp. SF, Ca.
- Related California Irvine Ca.
- Chelsea Investment corp. Carlsbad, Ca.
- Eden Housing Incorp. Hayward, Ca.
- Midpen Housing Corp. Foster City, Ca.
- National Community Renaissance Corp. Rancho Cucamonga, Ca.
- Retirement Housing Foundation Long Beach, Ca.
- Am-Cal Multi/housing Incorporated Agoura, Ca.
- St. Anton Partners Sacramento, Ca.
- USA Properties Fund Roseville, Ca.
- Linc Housing Long Beach, Ca.
- Roem Dev. Corp. Santa Clara, Ca.
- A Community of Friends LA, Ca.
- Resources for Community Development Berkeley, Ca.
- Domus Development LLC Irvine, Ca.

Affordable Housing Developers in the Bay Area (Nonprofits Only)

- Affordable Housing Associates
- Allied Housing
- Bridge Housing
- Christian Church Homes of Northern California
- Citizen's Housing Corporation
- East Bay Asian Local Development Corporation
- EAH Housing
- Housing Consortium of the East Bay
- Jubilee Restoration
- Mercy Housing California
- Mid-Peninsula Housing Coalition
- Northern California Land Trust
- Oakland Community Housing, Inc.
- Resources for Community Development
- Satellite Housing Inc.
- SHELTER, Inc.
- The Unity Council
- South County Housing
- Strategic Energy Innovations
- First Community Housing Corp
- Barry Swenson Builders

POTENTIAL PARTNERS

- Agriburbia in Golden, Colo.
- Farmer D Organics in Atlanta
- David Baker architect
- Moshe Safdie architect
- Open Space Authority SCV
- Green belt alliance
- Bridge Point Housing Foundation (Peter Sanchez)
- Winchester Orchard Neighborhood Association (Daphna Woolfe)
- Westfield
- Federal Realty
- City of Santa Clara
- City of San Jose
- California Native Garden Foundation
- CityView institutional investment firms focused on urban real estate
- SPUR
- Transform
- Greenbelt
- FRIT
- Foster City Ratner Companies
- SHoP Architects

ESTIMATED COSTS

We expect with alternative building methods and repurposed materials like shipping containers and cross laminated structures, building construction costs can be kept in the \$150-200/sq. ft range.

Similar projects that utilize subsidizes including city, federal and state tax credits, city backed bonds, discounted development fees, loans, grants, etc. and alternative construction methods, are able to keep their costs lower. We expect with this level of support, our construction costs could be as low as \$100/sq ft constuction costs for the building.

When looking at the over all cost of traditional projects in this area, including hard and soft costs such as marketing and sales even with land costs covered, costs were calculated at up to \$700/sq ft or more.

Examples and sources:

http://www.treasurer.ca.gov/ctcac/staff/2013/20130925/104.pdf
http://www.ti.org/vaupdate31.html
http://www.spur.org/publications/article/2014-02-11/real-costs-building-housing
http://www.ssfdowntownplan.org/storage/121119%20
SSF%20AHAD%20Strategy%20draft.pdf
http://www.svenergymap.org/pdfs/caseStudy381.pdf
Annual Affordable Housing Tour - SVLG

See Appendix 5.1-5.3 for further examples.

APPENDIX





Casa Feliz Studios is one of the larger MHP supportive housing developments designed to mainstream developmentally disabled residents. Residents have access to a computer learning center and are provided with services tailored to support low income tenants, such as financial literacy training, and computer literacy programs. Housing Choices Coalition provides resident services coordination for residents who have developmental disabilities, and facilitates communication between these residents, their individual case managers and other support staff, and the property management team. Individual tenant's case managers and other support staff are funded through the San Andreas Regional Center.

First Community Housing

75 E. Santa Clara St., Suite 1300 San Jose, California 95113 408-291-8650 www.firsthousing.org

Building Community First.

Casa Feliz Studios 525 South Ninth Street San Jose, CA 95112 408-516-4776 www.casafelizapartments.org





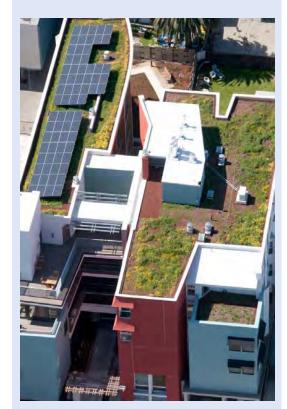
Construction Lenders

Construction was financed by tax credits, tax-exempt bond financing from U.S. Bank (\$10.5 million) and residual receipts loans and grants from the City of San Jose (\$1,000,000 w/a \$150,000 grant), AHP (\$400,000), and the State of California (\$1,171,000). The General Partner contributed to the construction budget in the form of deferred developer fee to ensure that the required \$15.6 million of construction funds were available.

Permanent Financing

- Tax credit equity \$6.2 million.
- Residual receipts loan from MHP \$7,000,000.
- Residual receipts loan and grant from the City of San Jose \$1,150,000.

Casa Feliz was completed in April of 2009 for a total construction cost of \$15.7 million.







Casa Feliz Studios, located in downtown San Jose, is a 60 unit Single Room Occupancy (SRO) residential building serving extremely low income tenants (20-35% AMI) which will remain at affordable rents for a period of 55 years. These energy-efficient efficiencies provide private bathrooms and kitchens on this infill site near transit. The four story building has one level of parking below, a courtyard with a front porch, and landscaped common areas front and back. The Architect is Rob Wellington Quigley, FAIA, an award-winning architectural firm that designed this building to replace an existing SRO and to enhance the existing neighborhood.

Twenty-one (or 35%) of the units are set aside for residents with developmental disabilities. Services for Casa Feliz residents with developmental disabilities are provided through the San Andreas Regional Center. Housing Choices Coalition provides Resident Services Coordination to Casa Feliz residents with developmental disabilities, and facilitates communication between these residents and property management.

bae urban economics

South San Francisco Downtown Station Area Plan Affordable Housing and Anti-Displacement Strategy

November 19. 2012



INTRODUCTION

The City of South San Francisco is undertaking the preparation of a Downtown Station Area Specific Plan (Specific Plan) for the area surrounding the City's Caltrain commuter rail station. Downtown South San Francisco is situated just west of Highway 101 and has retained a historic character with fine-grained, mixed-use development that contrasts with the large office and R&D node on the opposite side of the highway. The Cal train station is situated between these two sections of the City; however the highway, ramps, and overpasses create physical barriers that separate the Downtown from the employment center on the eastern side of the City and limit accessibility to the Caltrain station from all directions. At present, the South San Francisco Caltrain station is significantly underutilized due primarily to these accessibility issues.

A primary goal of the Specific Plan is to implement transit-supportive development in Downtown South San Francisco that meets the diversity and affordability needs of the local community. In pursuit of this goal, the Specific Plan seeks to improve accessibility between the Caltrain station, Downtown, and the employment center east of Highway 101. The Specific Plan effort requires an analysis of land uses that can support these objectives, including additional housing opportunities, retail development, and office development, and an evaluation of existing development standards, such as parking requirements.

The Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) are supporting the Downtown Station Area planning effort as well as station area planning efforts in jurisdictions throughout the Bay Area. These station area plans are meant to facilitate implementation of the Jobs-Housing Connection Strategy that ABAG and MTC approved in May 2012, which plans for the anticipated household and employment growth in the region over the next 30 years with an emphasis on focusing most new nonagricultural development within the existing urban footprint, mostly in areas with high levels of transit accessibility. The Jobs-Housing Connection Strategy includes an estimate of the quantity of housing that will be needed in the region by 2040 as well the estimated need for affordability, projecting that most households (61 percent) in the Bay Area in 2040 will have very low, low, or moderate incomes.

Station area planning efforts are often associated with an increase in property values as a result of enhanced transit accessibility and public and private investment in the station area, making it particularly important to incorporate affordable housing considerations into station area planning. While an increase in property values can benefit a community in a number of ways, potential outcomes also include the displacement of existing low-income residents as the area becomes more desirable, increasing the demand for housing, and housing costs rise in response to the increase in demand. The risk of displacement is especially high in neighborhoods with a large number of low-income renter households, since increased demand

CALIFORNIA TAX CREDIT ALLOCATION COMMITTEE

Project Staff Report 2013 Second Round September 25, 2013

Project Number CA-13-104

Project Name Japantown Senior Apartments

Site Address: 675 N. 6th Street

San Jose, CA 95112 County: Santa Clara

Census Tract: 5011.010

 Tax Credit Amounts
 Federal/Annual
 State/Total

 Requested:
 \$1,164,656
 \$3,882,187

 Recommended:
 \$1,164,656
 \$3,882,187

Applicant Information

Applicant: Japantown Apartments, LP

Contact: Tom Iamesi

Address: 75 E. Santa Clara Street, Ste. 1300

San Jose, CA 95113

Phone: 408-291-8650 Fax: 408-993-9098

Email: tomi@firsthousing.org

General Partner(s) or Principal Owner(s): Japantown Apartments, LLC

General Partner Type: Nonprofit

Parent Company(ies):

Developer:

Investor/Consultant:

Management Agent(s):

First Community Housing
Community Economics
Christian Church Homes

Project Information

Construction Type: New Construction

Total # Residential Buildings: 1 Total # of Units: 75

No. & % of Tax Credit Units: 74 100% Federal Set-Aside Elected: 40%/60% Federal Subsidy: N/A

Affordability Breakdown by Units and % (Lowest Income Points):

30% AMI: 8 10 % 40% AMI: 15 20 % 50% AMI: 31 40 %

Information

Set-Aside: N/A Housing Type: Seniors

Geographic Area: South and West Bay Region

TCAC Project Analyst: Benjamin Schwartz

Unit Mix

1 SRO/Studio Units
73 1-Bedroom Units
1 2-Bedroom Units
75 Total Units

Unit Type & Number		2013 Rents Targeted % of Area Median Income	2013 Rents Actual % of Area Median Income	Rent (including utilities)
1	SRO/Studio	50%	50%	\$887
8	1 Bedroom	30%	30%	\$570
15	1 Bedroom	40%	40%	\$760
30	1 Bedroom	50%	50%	\$950
20	1 Bedroom	60%	60%	\$1,140
1	2 Bedrooms	Manager's Unit	Manager's Unit	\$1,250

Project Financing

Estimated Total Project Cost: \$29,148,999 Estimated Residential Project Cost: \$29,148,999

Construction Financing Permanent Financing

Residential

Per Unit Cost:

Construction Cost Per Square Foot:

\$270

\$388,653

Source	Amount	Source	Amount
US Bank	\$16,536,209	Permanent Lender - TBD	\$4,458,000
City of San Jose	\$4,900,000	City of San Jose	\$4,900,000
City of San Jose - Waived Fees	\$1,132,200	AHP	\$750,000
City of San Jose - Donated Land	\$3,000,000	City of San Jose - Waived Fees	\$1,132,200
GP Equity	\$100	City of San Jose - Donated Land	\$3,000,000
Tax Credit Equity	\$2,207,243	GP Equity	\$100
		Deferred Developer Fee	\$193,743
		Tax Credit Equity	\$14,714,956
		TOTAL	\$29,148,999

CA-13-104 1 September 25, 2013 CA-13-104 2 September 25, 2013

The Santa Clara Weekly

Santa Clara's Community Newspaper

City Desk: May 14, 2014 By Carolyn Schuk

Monticello Village Project Sent Back to the Drawing Board for More Family-Friendly Amenities

Irvine Company's proposed development for 3515-3585 Monroe St. ran aground at last Tuesday's Santa Clara City Council meeting on the question of open space and recreational areas for families and children. The discussion offered insight into how this and future Councils will be viewing new residential development proposals.

The project concept first surfaced over a year ago. Four stories high with ground level retail, it includes 825 apartments - which could house as many as 1,500 to 2,000 people - 43,849 square feet of retail space, and amenities like swimming pools and fitness clubs for residents. One-story industrial buildings and parking lots are currently on the site.

The plan has a lot going for it. It's close to the Lawrence Caltrain station - a "quintessential transit-oriented community" Irvine representative Carlene Matchniff called it - a full-service grocery store, and varied architecture to create an interesting streetscape. It will also create around 1,700 construction jobs and 200 permanent jobs.

But the Council's sending the project back for some redesign reflects fundamental issues facing the city as it grows. Namely, as the city becomes increasingly a community of apartment-dwellers, where are residents' - especially children's - recreational needs met? And who's going to pay for it?

"The fact is that we're not going to be building single family homes" said Council Mamber Torses O'Neill, noting that on a recent visit to Imvino's North Sen, loss Crossent Village, studie, one and two

"The fact is that we're not going to be building single family homes," said Council Member Teresa O'Neill, noting that on a recent visit to Irvine's North San Jose Crescent Village - studio, one and two bedroom apartments ranging in price from \$2,100 to \$3,200 a month - she was surrounded in the elevator with mothers with strollers.

"A lot of people are going to be living in apartments. We can't look at these units as transitional housing. They've got to be housing for a lifetime." The Silicon Valley Index reports that less than half of first-time buyers can afford a house in the area. And even if they could afford an \$800,000 house, many Millennials have different priorities, regardless of their income.*

"We have developers coming to the City presenting projects with no open space and paying fees," said Council Member Lisa Gillmor, "and I'm not comfortable with that. Even if you're an urban professional, you're going to have babies. There are urban families with children, there is literally no place in this development for them to play."

This wasn't the first time Irvine heard this criticism, according to Gillmor. In response, Irvine offered the city \$3 million to improve local parks and recreation facilities.

Mayor Jamie Matthews asked if Irvine was willing to add a "children's amenity." Matchniff replied they were "willing to add that if you're willing to bypass architectural review [and] we could work with Parks & Rec."

"We have an architectural committee meeting tomorrow," said Council Member Pat Mahan, meaning the review would be expedited.

"Our preference is to come in and work with staff," said Matchniff. "It's been in 18 months of review. The issue has not come up at a staff level."

Eighteen months of review or not, the Council asked Irvine to return with a plan that addressed these concerns about open space and recreation areas.

In the meantime, the City is also working on a way to provide amenities and services that will be required by new building: development impact fees.

"We're still working on the formula [for] a development fee as an offset for the number of units being created," said City Manager Julio Fuentes. "Just about every city charges development fees. There's a tremendous amount of revenue that we're not collecting."

* "For Millennials, Retirement Beats Home Ownership," www.cnbc.com/id/101646498.