



CITY OF  
**FOLSOM**  
DISTINCTIVE BY NATURE

# Agenda

## City Council Regular Meeting

City Council Chambers | 50 Natoma Street, Folsom CA 95630

January 26, 2021

6:30 PM

## Welcome to Your City Council Meeting

We welcome your interest and involvement in the city’s legislative process. This agenda includes information about topics coming before the City Council and the action recommended by city staff. You can read about each topic in the staff reports, which are available on the city website and in the Office of the City Clerk. The City Clerk is also available to answer any questions you have about City Council meeting procedures.

### Participation

If you would like to provide comments to the City Council, please:




- Fill out a blue speaker request form, located at the back table.
- Submit the form to the City Clerk before the item begins.
- When it’s your turn, the City Clerk will call your name and invite you to the podium.
- Speakers have three minutes, unless the presiding officer (usually the mayor) changes that time.

### Reasonable Accommodations

In compliance with the Americans with Disabilities Act, if you are a person with a disability and you need a disability-related modification or accommodation to participate in this meeting, please contact the City Clerk’s Office at (916) 461-6035, (916) 355-7328 (fax) or [CityClerkDept@folsom.ca.us](mailto:CityClerkDept@folsom.ca.us). Requests must be made as early as possible and at least two full business days before the start of the meeting.

### How to Watch

The City of Folsom provides three ways to watch a City Council meeting:

| In Person   | Online  | On TV   |
|---|---|---|
|  |                                        |  |
| City Council meetings take place at City Hall, 50 Natoma Street                     | Watch the livestream and replay past meetings on the city website, <a href="http://www.folsom.ca.us">www.folsom.ca.us</a> | Watch live and replays of meetings on Sac Metro Cable TV, Channel 14                  |

**More information about City Council meetings is available at the end of this agenda**



CITY OF  
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## City Council Regular Meeting

**Folsom City Council Chambers**  
**50 Natoma Street, Folsom, CA**  
[www.folsom.ca.us](http://www.folsom.ca.us)

**Tuesday, January 26, 2021 6:30 PM**

*Mike Kozlowski, Mayor*

*Sarah Aquino, Vice Mayor*  
*Kerri Howell, Councilmember*

*YK Chalamcherla, Councilmember*  
*Rosario Rodriguez, Councilmember*

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### **REGULAR CITY COUNCIL AGENDA**

*Pursuant to Governor Newsom's Executive Order N-29-20, members of the Folsom City Council and staff may participate in this meeting via teleconference.*

*Due to the coronavirus (COVID-19) public health emergency, the City of Folsom is allowing for remote public input during City Council meetings. Members of the public are encouraged to participate by emailing comments to [CityClerkDept@folsom.ca.us](mailto:CityClerkDept@folsom.ca.us). Emailed comments must be received no later than thirty minutes before the meeting and will be read aloud at the meeting during the agenda item. Please make your comments brief. Written comments submitted and read into the public record must adhere to the principles of the three-minute speaking time permitted for in-person public comment at City Council meetings. Members of the public wishing to participate in this meeting via teleconference may email [CityClerkDept@folsom.ca.us](mailto:CityClerkDept@folsom.ca.us) no later than thirty minutes before the meeting to obtain call-in information. Each meeting may have different call-in information. Verbal comments via teleconference must adhere to the principles of the three-minute speaking time permitted for in-person public comment at City Council meetings.*

*Members of the public may continue to participate in the meeting in person at Folsom City Hall, 50 Natoma Street, Folsom, CA while maintaining appropriate social distancing and wearing face coverings.*

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### **CALL TO ORDER**

### **ROLL CALL:**

**Councilmembers:** Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski

The City Council has adopted a policy that no new item will begin after 10:30 p.m. Therefore, if you are here for an item that has not been heard by 10:30 p.m., you may leave, as the item will be continued to a future Council Meeting.

### **PLEDGE OF ALLEGIANCE**

## **AGENDA UPDATE**

### **BUSINESS FROM THE FLOOR:**

Members of the public are entitled to address the City Council concerning any item within the Folsom City Council's subject matter jurisdiction. Public comments are limited to no more than three minutes. Except for certain specific exceptions, the City Council is prohibited from discussing or taking action on any item not appearing on the posted agenda.

### **SCHEDULED PRESENTATIONS:**

- [1.](#) Mayor Kozlowski to Administer the California Attorney Oath to Spencer Hodson Following His Successful Passing of the California Bar Examination
- [2.](#) Folsom Plan Area Quarterly Update
- [3.](#) Economic and Budget Overview Presentation

### **CONSENT CALENDAR:**

Items appearing on the Consent Calendar are considered routine and may be approved by one motion. City Councilmembers may pull an item for discussion.

- [4.](#) Approval of January 12, 2021 Special and Regular Meeting Minutes
- [5.](#) Resolution No. 10581 - A Resolution Authorizing the City Manager to Execute a Consultant Agreement with WLC Architects for Architectural Services for the Folsom Police Station Rehabilitation Project
- [6.](#) Resolution No. 10582 – A Resolution Authorizing the City Manager to Execute an Agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project

### **OLD BUSINESS:**

- [7.](#) Presentation Regarding the Impacts of Organics Recycling Mandated by SB1383 and Direction to Staff

### **NEW BUSINESS:**

- [8.](#) Affordable Housing Fund Requests and Direction to Staff
  - a. Resolution No. 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds
  - b. Resolution No. 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement And Related Documents and Authorizing the City's Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds
- [9.](#) Appointment of City Council Representatives to Regional Commissions
- [10.](#) Mayor's Appointment and Confirmation by the City Council of Planning Commissioners to Serve on the Historic District Commission

**CITY MANAGER REPORTS:**

**COUNCIL COMMENTS:**

**ADJOURNMENT**

The City Council's next regular meeting is scheduled for February 9, 2021.

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**NOTICE:** *Members of the public are entitled to directly address the City Council concerning any item that is described in the notice of this meeting, before or during consideration of that item. If you wish to address Council on an issue, which is on this agenda, please complete a blue speaker request card, and deliver it to a staff member at the table on the left side of the Council Chambers prior to discussion of the item. When your name is called, stand to be recognized by the Mayor and then proceed to the podium. If you wish to address the City Council on any other item of interest to the public, when the Mayor asks if there is any "Business from the Floor," follow the same procedure described above. Please limit your comments to three minutes or less.*

**NOTICE REGARDING CHALLENGES TO DECISIONS:** *Pursuant to all applicable laws and regulations, including without limitation, California Government Code Section 65009 and or California Public Resources Code Section 21177, if you wish to challenge in court any of the above decisions (regarding planning, zoning and/or environmental decisions), you may be limited to raising only those issues you or someone else raised at the public hearing(s) described in this notice/agenda, or in written correspondence delivered to the City at, or prior to, the public hearing.*

*As presiding officer, the Mayor has the authority to preserve order at all City Council meetings, to remove or cause the removal of any person from any such meeting for disorderly conduct, or for making personal, impertinent, or slanderous remarks, using profanity, or becoming boisterous, threatening or personally abusive while addressing said Council, and to enforce the rules of the Council.*

**PERSONS INTERESTED IN PROPOSING AN ITEM FOR THE CITY COUNCIL AGENDA SHOULD CONTACT A MEMBER OF THE CITY COUNCIL.**

*The meeting of the Folsom City Council is being telecast on Metro Cable TV, Channel 14, the Government Affairs Channel, and will be shown in its entirety on the Friday and Saturday following the meeting, both at 9 a.m. The City does not control scheduling of this telecast and persons interested in watching the televised meeting should confirm this schedule with Metro Cable TV, Channel 14. The City of Folsom provides live and archived webcasts of regular City Council meetings. The webcasts can be found on the online services page of the City's website [www.folsom.ca.us](http://www.folsom.ca.us).*

*In compliance with the Americans with Disabilities Act, if you are a person with a disability and you need a disability-related modification or accommodation to participate in this meeting, please contact the City Clerk's Office at (916) 461-6035, (916) 355-7328 (fax) or [CityClerkDept@folsom.ca.us](mailto:CityClerkDept@folsom.ca.us). Requests must be made as early as possible and at least two full business days before the start of the meeting.*

*Any documents produced by the City and distributed to the City Council regarding any item on this agenda will be made available at the City Clerk's Counter at City Hall located at 50 Natoma Street, Folsom, California and at the Folsom Public Library located at 411 Stafford Street, Folsom, California during normal business hours.*





**CITY OF FOLSOM**  
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## Folsom City Council Staff Report



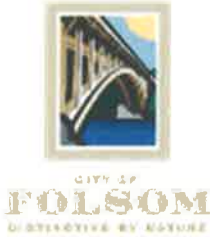
|                        |   |
|------------------------|---|
| <b>MEETING DATE:</b>   | 1/26/2021   |
| <b>AGENDA SECTION:</b> | Scheduled Presentations   |
| <b>SUBJECT:</b>        | Mayor Kozlowski to Administer the California Attorney Oath to Spencer Hodson Following His Successful Passing of the California Bar Examination |
| <b>FROM:</b>           | City Clerk's Department   |

Mayor Kozlowski will administer the California Attorney Oath to Spencer Hodson following his successful passing of the California Bar Examination.

Respectfully submitted,

\_\_\_\_\_  
Christa Freemantle, CMC  
City Clerk

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# Folsom City Council Staff Report



|                        |                                   |
|------------------------|-----------------------------------|
| <b>MEETING DATE:</b>   | 1/26/2021                         |
| <b>AGENDA SECTION:</b> | Scheduled Presentations           |
| <b>SUBJECT:</b>        | Folsom Plan Area Quarterly Report |
| <b>FROM:</b>           | Community Development Department  |

**RECOMMENDATION / CITY COUNCIL ACTION**

No action is requested of the City Council at this time.

**BACKGROUND / ISSUE**

Community Development staff will provide an update on the planning, engineering and building activity in the Folsom Plan Area south of Highway 50 during the fourth and final quarter of 2020.

**ATTACHMENT**

1. Power Point Presentation

Submitted,

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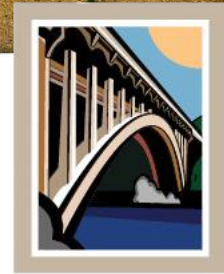
Pam Johns, Community Development Director

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# Folsom Plan Area Quarterly Update Q4 2020

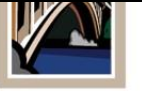


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# FPA Quarterly Update Outline

01/26/2021 Item No.2.



CITY OF  
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Planning Activity

Infrastructure and Site Engineering Activity

Map Activity

Building Activity

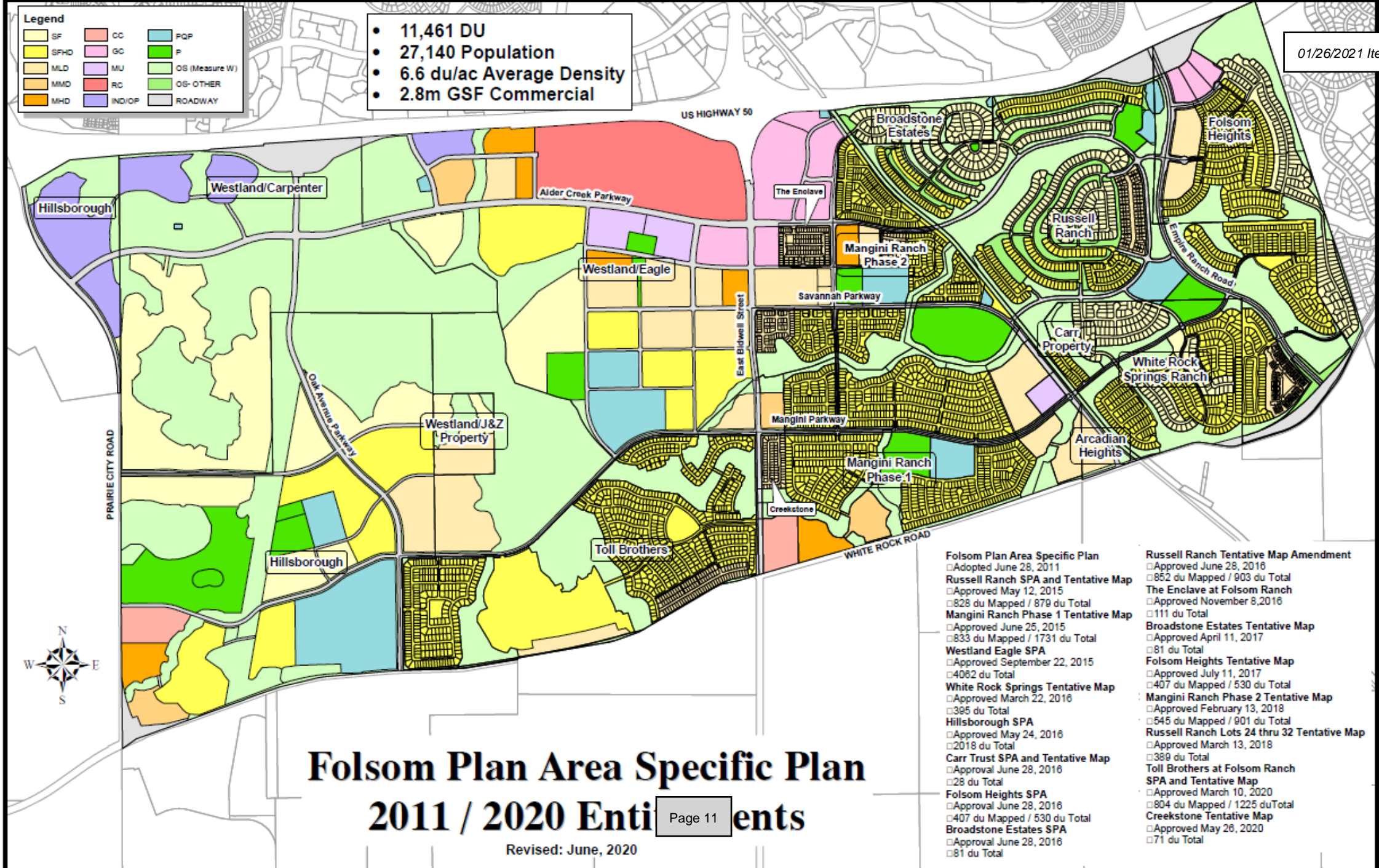
Public Information/City Website



**Legend**

|      |        |                |
|------|--------|----------------|
| SF   | CC     | FQP            |
| SFHD | GC     | F              |
| MLD  | MU     | OS (Measure W) |
| MMD  | RC     | OS- OTHER      |
| MHD  | IND/OP | ROADWAY        |

- 11,461 DU
- 27,140 Population
- 6.6 du/ac Average Density
- 2.8m GSF Commercial



# Folsom Plan Area Specific Plan

## 2011 / 2020 Entitlements

- |   |  |
|---|--|
| <p><b>Folsom Plan Area Specific Plan</b></p> <ul style="list-style-type: none"> <li>□ Adopted June 28, 2011</li> </ul> <p><b>Russell Ranch SPA and Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved May 12, 2015</li> <li>□ 828 du Mapped / 879 du Total</li> </ul> <p><b>Mangini Ranch Phase 1 Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved June 25, 2015</li> <li>□ 833 du Mapped / 1731 du Total</li> </ul> <p><b>Westland Eagle SPA</b></p> <ul style="list-style-type: none"> <li>□ Approved September 22, 2015</li> <li>□ 4062 du Total</li> </ul> <p><b>White Rock Springs Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved March 22, 2016</li> <li>□ 395 du Total</li> </ul> <p><b>Hillsborough SPA</b></p> <ul style="list-style-type: none"> <li>□ Approved May 24, 2016</li> <li>□ 2018 du Total</li> </ul> <p><b>Carr Trust SPA and Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approval June 28, 2016</li> <li>□ 28 du Total</li> </ul> <p><b>Folsom Heights SPA</b></p> <ul style="list-style-type: none"> <li>□ Approval June 28, 2016</li> <li>□ 407 du Mapped / 530 du Total</li> </ul> <p><b>Broadstone Estates SPA</b></p> <ul style="list-style-type: none"> <li>□ Approval June 28, 2016</li> <li>□ 81 du Total</li> </ul> | <p><b>Russell Ranch Tentative Map Amendment</b></p> <ul style="list-style-type: none"> <li>□ Approved June 28, 2016</li> <li>□ 852 du Mapped / 903 du Total</li> </ul> <p><b>The Enclave at Folsom Ranch</b></p> <ul style="list-style-type: none"> <li>□ Approved November 8, 2016</li> <li>□ 111 du Total</li> </ul> <p><b>Broadstone Estates Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved April 11, 2017</li> <li>□ 81 du Total</li> </ul> <p><b>Folsom Heights Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved July 11, 2017</li> <li>□ 407 du Mapped / 530 du Total</li> </ul> <p><b>Mangini Ranch Phase 2 Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved February 13, 2018</li> <li>□ 545 du Mapped / 901 du Total</li> </ul> <p><b>Russell Ranch Lots 24 thru 32 Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved March 13, 2018</li> <li>□ 389 du Total</li> </ul> <p><b>Toll Brothers at Folsom Ranch SPA and Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved March 10, 2020</li> <li>□ 804 du Mapped / 1225 du Total</li> </ul> <p><b>Creekstone Tentative Map</b></p> <ul style="list-style-type: none"> <li>□ Approved May 26, 2020</li> <li>□ 71 du Total</li> </ul> |
|---|--|

# Planning Activity (last 90 days)

## New Development Applications (now pending)

01/26/2021 Item No.2.



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### New Development Applications Submitted

Van Daele Homes - Bungalows

Van Daele Multifamily Apartments

Town Center South Maps

White Rock Springs Ranch V2 – 3 Residential Design Review

Mangini Ranch Phase 1C (north) – Subdivision Map/Design Review

Mangini Ranch Phase 1C (4-pack) – Subdivision Map/Planned Development

Mangini Place St Anton Affordable Apartments

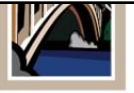
Toll Brothers Phase 2 Subdivision Map



# Development Applications Submitted/Pending

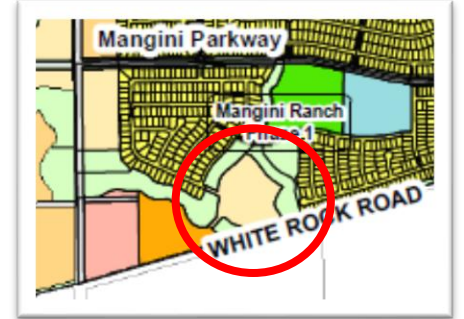
## Van Daele Bungalows Tentative Parcel Map and Design Review

01/26/2021 Item No.2.



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Multifamily Bungalows  
160-unit multifamily rental community  
2-, 3- and 4-bedroom units  
Community clubhouse, outdoor amenities



FRONT



REAR

CLUBHOUSE AND LEASING BUILDING



FRONT

Farmhouse Variation 1  
14'0" x 12'0"

Page 13



FRONT

Farmhouse Variation 3  
14'0" x 12'0"



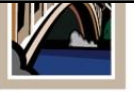
FRONT

Farmhouse Variation 2  
14'0" x 12'0"

# Development Applications Submitted/Pending

## Van Daele Multifamily Design Review

01/26/2021 Item No.2.



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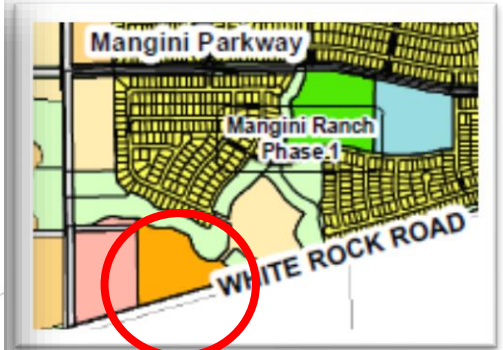
REAR



RIGHT



FRONT



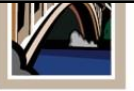
278-unit multifamily apartment project  
Three-story buildings  
1-, 2-, and 3-bedroom units  
Clubhouse and outdoor amenities



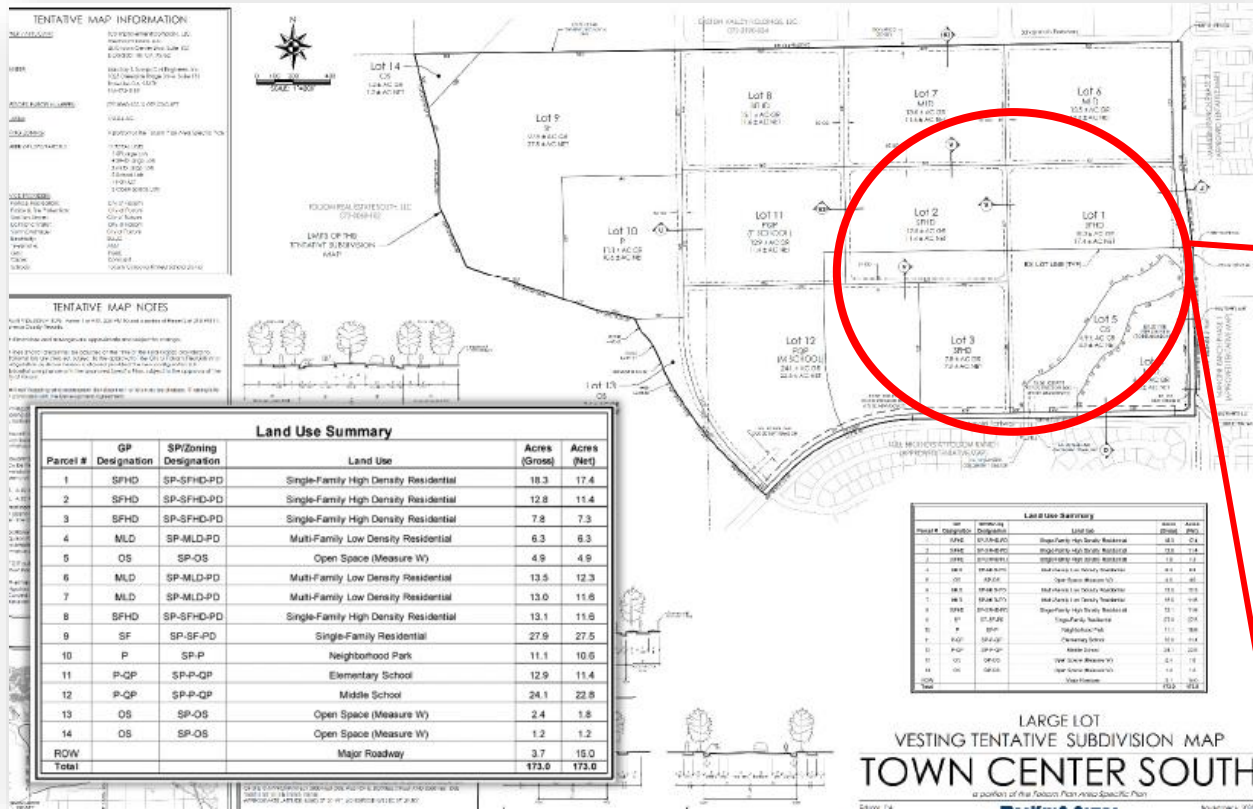
# Development Applications Submitted/Pending

## Town Center South Large Lot and Small Lot Tentative Subdivision Maps

01/26/2021 Item No.2.



CITY OF  
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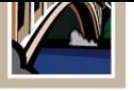
Large Lot Vesting TSM subdividing 173 acres into 14 large lots

Small Lot Vesting TSM subdividing 54.4 acres into 260 residential lots

# Development Applications Submitted/Pending

## White Rock Springs Ranch V2 – 3 Residential Design Review

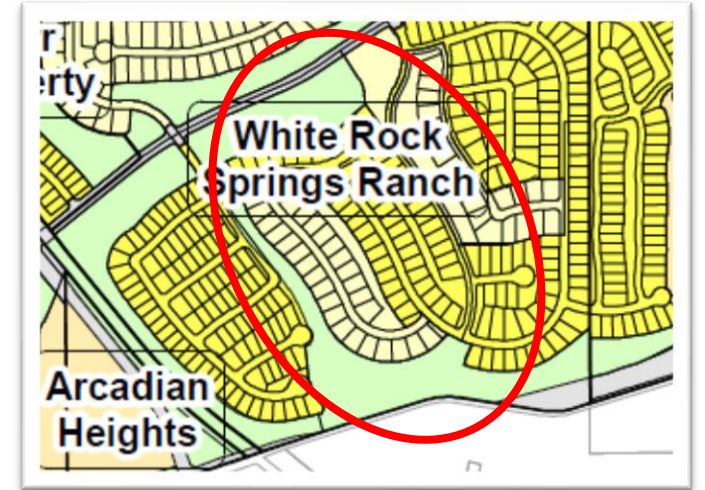
01/26/2021 Item No.2.



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Residential Design Review  
Richmond American Homes



DECKER

C ELEVATION  
CRAFTSMAN

AVALON

B ELEVATION  
FARMHOUSE

ARLINGTON

A ELEVATION  
MONTEREY

DELANEY

B ELEVATION  
FARMHOUSE

DANIEL

A ELEVATION  
MONTEREY

DOMINIC

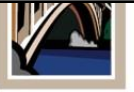
C ELEVATION  
CRAFTSMAN



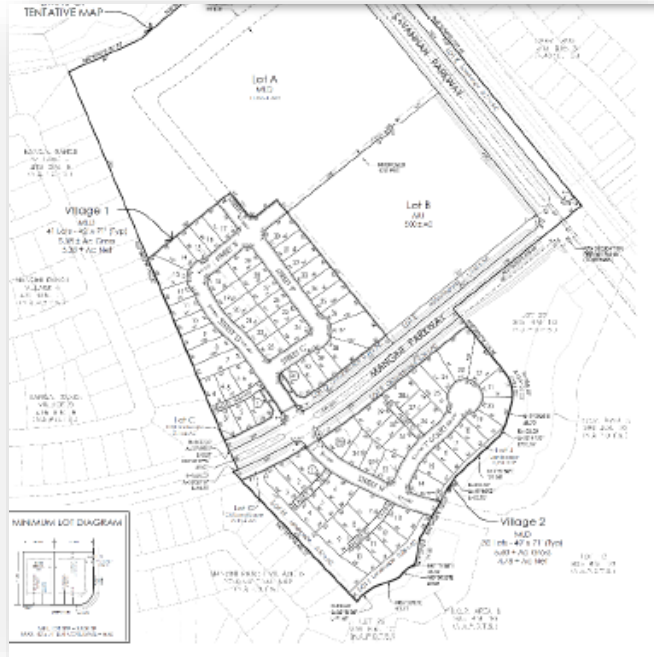
# Development Applications Submitted/Pending

## Mangini Ranch Phase 1C (north) – Subdivision Map/Design Review

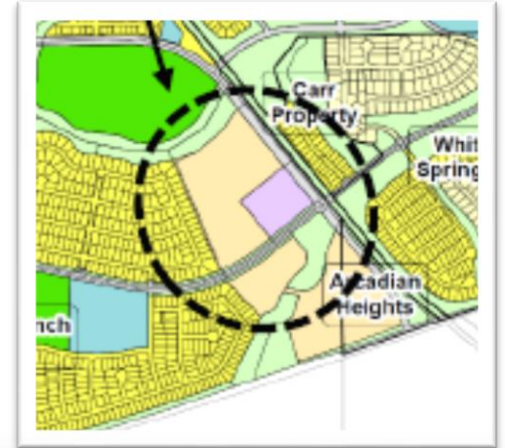
01/26/2021 Item No.2.



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### Residential Design Review



Large Lot Vesting TSM (32 acres)  
Small Lot Vesting TSM  
subdividing 11 acres into 76  
single family lots



Front Elevation 2B - Italian Villa

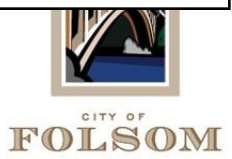
Front Elevation 1A - Modern Spanish

Front Elevation 3C - Modern Prairie

# Development Applications Submitted/Pending

## Mangini Ranch Phase 1C (4-pack) – Subdivision Map/Planned Development

01/26/2021 Item No.2.



Planned Development



Small Lot Vesting TSM  
subdividing 11 acres into  
100 single family small lots



Western Farmhouse 2B  
Right Elevation Facing Street

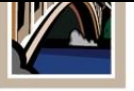
Modern Prairie 3C  
Right Elevation Facing Street



# Development Applications Submitted/Pending

## Mangini Place St Anton Affordable Apartments Design Review

01/26/2021 Item No.2.



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SAVANNAH PARKWAY

MANGINI PARKWAY



MANGINI PLACE AFFORDABLE  
FOLSOM, CALIFORNIA

EXTERIOR COLOR SCHEDULE

| NO. | EXTERIOR | COLOR |
|-----|----------|-------|
| 1   | ROOFING  | BLACK |
| 2   | WALLS    | CREAM |
| 3   | WALLS    | CREAM |
| 4   | WALLS    | CREAM |
| 5   | WALLS    | CREAM |
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| 96  | WALLS    | CREAM |
| 97  | WALLS    | CREAM |
| 98  | WALLS    | CREAM |
| 99  | WALLS    | CREAM |
| 100 | WALLS    | CREAM |

BUILDING C ELEVATIONS

1/8" = 1'-0"



BUILDING D ELEVATIONS

1/8" = 1'-0"

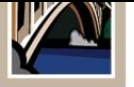


152-unit income-restricted luxury family rental housing on 5-acre site

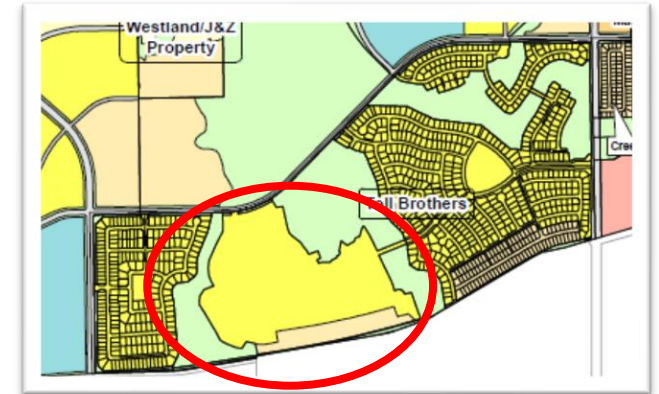
# Development Applications Submitted/Pending

## Toll Brothers Phase 2 Subdivision Map

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

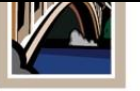


Small Lot Vesting Subdivision Map  
subdividing 64.7 acres into  
329 single family lots as part of  
age-restricted community

# Planning Activity (last 90 days)

## City Actions

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

### Planning Commission Actions on Development Applications

Toll Brothers Subdivision Clubhouse Design Review

The Shops Map and Planned Development Extension

White Rock Springs Ranch Villages 4 & 8 Residential Design Review

### City Council Actions on Development Applications

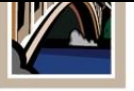
Creekstone Final Map



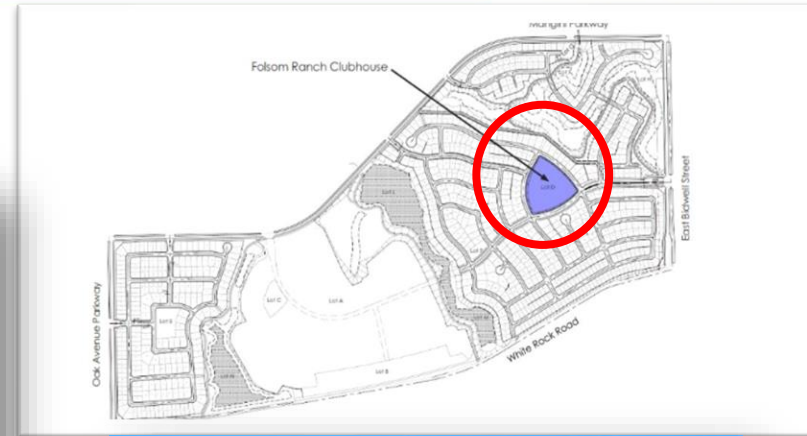
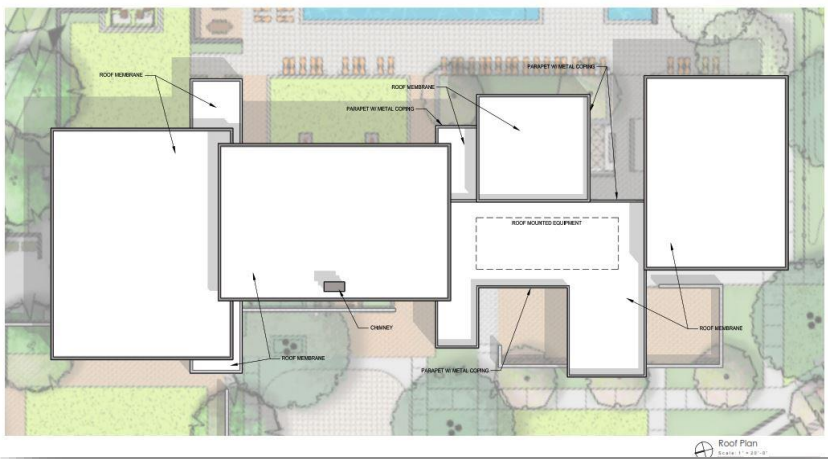
# PC Approved: Toll Brothers Clubhouse Design Review

October 8, 2020

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**



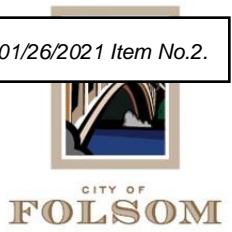
18,600 sf single-story clubhouse  
Indoor Amenities (pool, fitness center, social Hall, meeting rooms)  
Outdoor Amenities (pool, spa, sports courts, p green, lounge area)



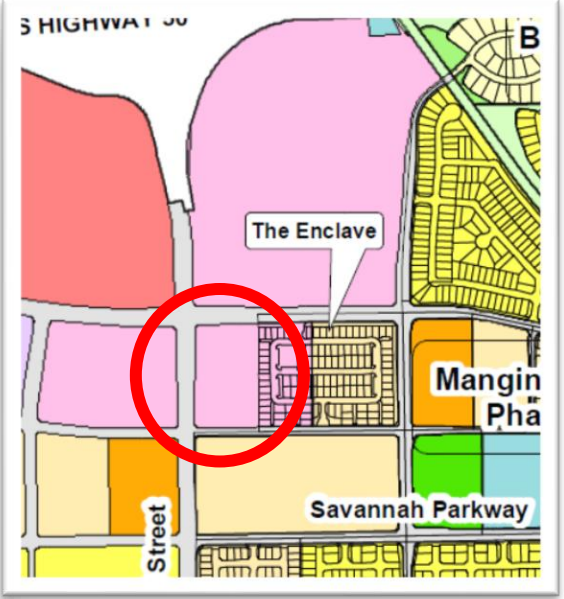
# PC Approved: The Shops at Folsom Ranch Extension

December 2, 2020

01/26/2021 Item No.2.



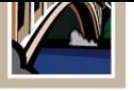
## Tentative Parcel Map and Planned Development Permit Extension



# PC Approved: WRSR V4 – 8 Design Review

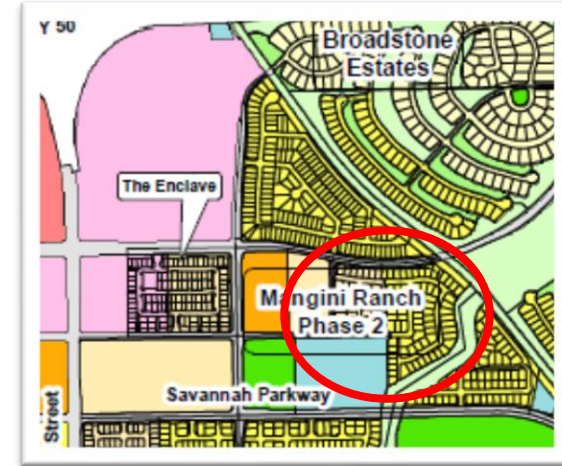
December 8, 2020

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

KB Homes Residential Design Review  
White Rock Springs Ranch Villages 4 - 8



Elevation 'A' - Spanish

1685

Elevation 'B' - Craftsman

2696

Elevation 'C' - Farmhouse

2278

Elevation 'D' - Cottage

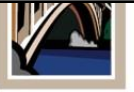
1429



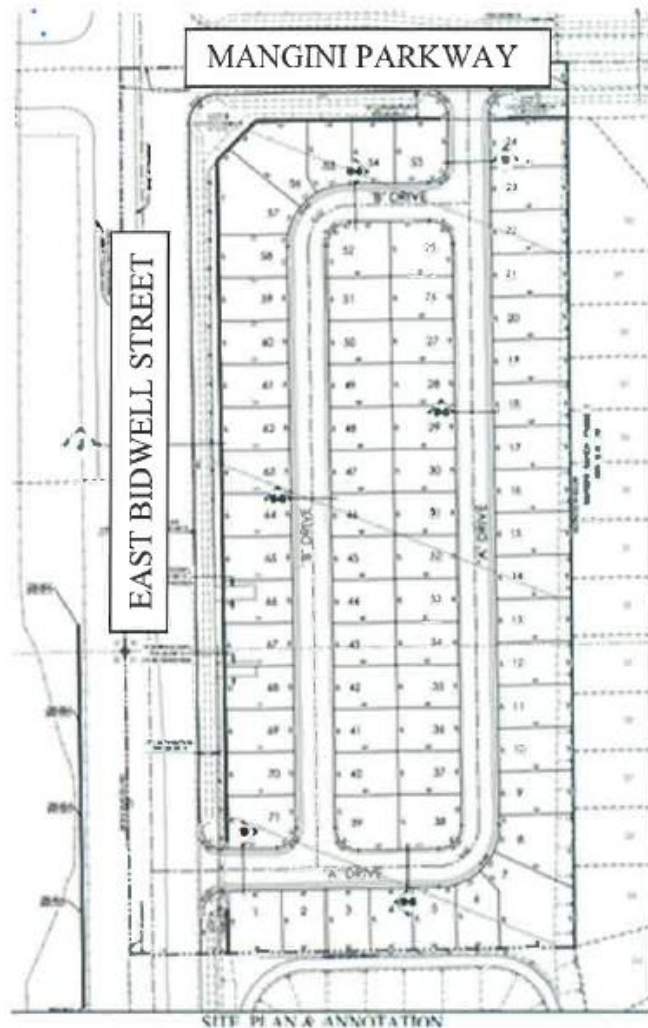
# CC Approved: Creekstone Final Map

December 8, 2020

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

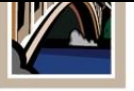


71 sf units, higher density detached lots (MLD)

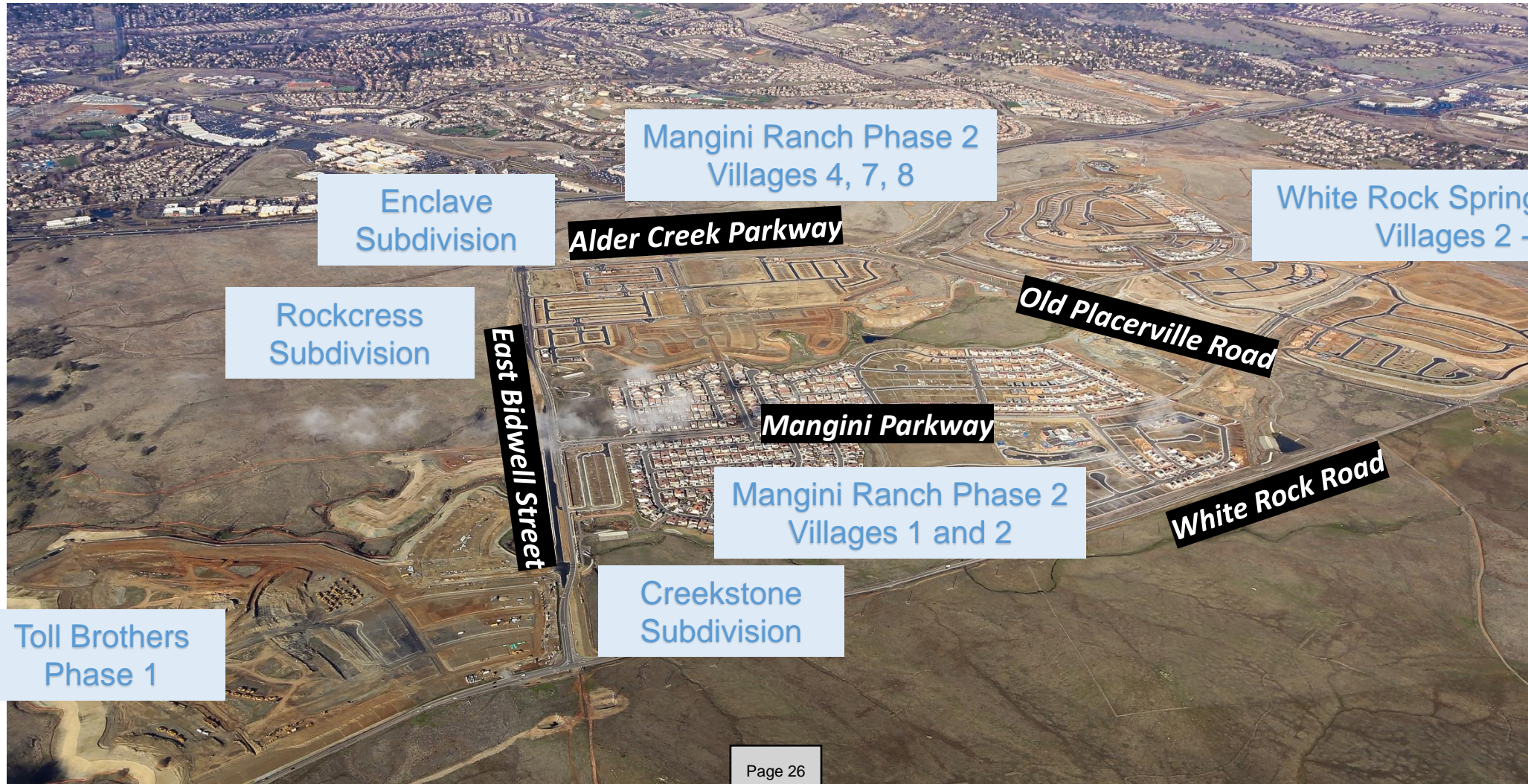


# Infrastructure/Site Engineering Activity (Last 90 Days)

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**



# FOLSOM PLAN AREA SMALL LOT FINAL MAP ACTIVITY

| Tentative Maps Approved by City Council                   | Final Maps Approved by CC   | Small Lot Final Maps Submitted <span style="border: 1px solid black; padding: 2px;">01/26/2021 Item No.2.</span> |
|---|---|--|
| <b>Mangini Ranch Phase 1 (833 dwelling units)</b>         | Village 1 (May 2018)<br>Villages 8 and 9 (May 2018)<br>Village 2 (June 2018)<br>Village 5 (September 2019)<br>Villages 6 and 7 (November 2019)<br>Village 4 (July 2020)<br>Creekstone (December 2020) | Village 3  |
| <b>White Rock Springs Ranch (395 dwelling units)</b>      | Village 1 (July 2019)<br>Villages 8 and 9 (October 2019)<br>Villages 2 – 7 (December 2019)  |  |
| <b>Carr Trust (28 dwelling units)</b>                     | Carr Trust (July 23, 2019)  |  |
| <b>Russell Ranch Phase 1 (394 dwelling units)</b>         | Village 6 (February 2019)<br>Villages 1, 2, 3, and 7 (March 2019)<br>Village 5 and 8 (May 2019)<br>Village 4 (June 2019)  |  |
| <b>Russell Ranch Phase 3 (242 dwelling units)</b>         |   | Phase 3  |
| <b>Enclave at Folsom Ranch (111 dwelling units)</b>       | Enclave (April 2020)  |  |
| <b>Mangini Ranch Phase 2 (545 dwelling units)</b>         | Village 7 (December 2019)<br>Villages 4 and 8 (July 2020)<br>Rockcross (Jan 2021)   |  |
| <b>Toll Brothers at Folsom Ranch (804 dwelling units)</b> | <span style="border: 1px solid black; padding: 2px;">Page 27</span>   | Phase 1A, Phase 1B and 1C  |
| <b>Total SF Lots Ready for Permits</b>                    | <b>2081 lots mapped</b>   | <b>551 lots pending</b>  |



# Building Permit Tracking

## Total permits 854 (Q4: October – December: 182)

01/26/2021 Item No.2.



CITY OF FOLSOM

FOLSOM PLAN AREA BUILDING PERMIT OVERVIEW

AS OF 12/31/2020

| AREA                     | SUBDIVISION OR VILLAGE | LOT COUNT     |              |                | PERMIT ACTIVITY         |                             |                               |                      | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) |
|--------------------------|------------------------|---------------|--------------|----------------|-------------------------|-----------------------------|-------------------------------|----------------------|--|
|                          |                        | TENTATIVE MAP | FINAL MAPPED | % FINAL MAPPED | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | TOTAL PERMITS ISSUED |  |
| MANGINI RANCH PHASE 1    | VILLAGES 1-9           | 836           | 784          | 93.78%         | 139                     | 495                         | 59.21%                        | 634                  | 75.84%                                       |
| MANGINI RANCH PHASE 2    | VILLAGES 1-10          | 663           | 177          | 26.70%         | 9                       | 0                           | 0.00%                         | 9                    | 1.36%  |
| RUSSELL RANCH PHASE 1    | VILLAGES 1-8           | 394           | 394          | 100.00%        | 88                      | 60                          | 15.23%                        | 148                  |  |
| CARR TRUST               | NONE                   | 28            | 28           | 100.00%        | 0                       | 4                           | 14.29%                        | 4                    |  |
| WHITE ROCK SPRINGS RANCH | VILLAGES 1-9           | 395           | 395          | 100.00%        | 49                      | 0                           | 0.00%                         | 49                   |  |
| ENCLAVE AT FOLSOM RANCH  | NONE                   | 111           | 111          | 100.00%        | 8                       | 2                           | 1.80%                         | 10                   |  |
| TOLL BROTHERS            | NONE                   | 598           | 0            | 0.00%          | 0                       | 0                           | 0.00%                         | 0                    |  |
| <b>TOTALS</b>            |                        | <b>3025</b>   | <b>1889</b>  | <b>62.45%</b>  | <b>293</b>              | <b>561</b>                  | <b>18.55%</b>                 | <b>854</b>           |  |



CITY OF FOLSOM  
COMMUNITY DEVELOPMENT DEPARTMENT

FOLSOM PLAN AREA BUILDING PERMIT OVERVIEW

AS OF 12/31/2020

| AREA                     | SUBDIVISION OR VILLAGE | LOT COUNT     |              |                | PERMIT ACTIVITY         |                             |                               |                      | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) |
|--------------------------|------------------------|---------------|--------------|----------------|-------------------------|-----------------------------|-------------------------------|----------------------|--|
|                          |                        | TENTATIVE MAP | FINAL MAPPED | % FINAL MAPPED | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | TOTAL PERMITS ISSUED |  |
| MANGINI RANCH PHASE 1    | VILLAGES 1-9           | 836           | 784          | 93.78%         | 139                     | 495                         | 59.21%                        | 634                  | 75.84%                                       |
| MANGINI RANCH PHASE 2    | VILLAGES 1-10          | 663           | 177          | 26.70%         | 9                       | 0                           | 0.00%                         | 9                    | 1.36%  |
| RUSSELL RANCH PHASE 1    | VILLAGES 1-8           | 394           | 394          | 100.00%        | 88                      | 60                          | 15.23%                        | 148                  | 37.56%                                       |
| CARR TRUST               | NONE                   | 28            | 28           | 100.00%        | 0                       | 4                           | 14.29%                        | 4                    | 14.29%                                       |
| WHITE ROCK SPRINGS RANCH | VILLAGES 1-9           | 395           | 395          | 100.00%        | 49                      | 0                           | 0.00%                         | 49                   | 12.41%                                       |
| ENCLAVE AT FOLSOM RANCH  | NONE                   | 111           | 111          | 100.00%        | 8                       | 2                           | 1.80%                         | 2                    | 1.80%  |
| TOLL BROTHERS            | NONE                   | 598           | 0            | 0.00%          | 0                       | 0                           | 0.00%                         | 0                    | 0.00%  |
| <b>TOTALS</b>            |                        | <b>3025</b>   | <b>1889</b>  | <b>62.45%</b>  | <b>293</b>              | <b>561</b>                  | <b>18.55%</b>                 | <b>854</b>           | <b>28.23%</b>                                |



CITY OF FOLSOM  
COMMUNITY DEVELOPMENT DEPARTMENT

| AREA          | PHASE | VILLAGE | VILLAGE NAME | ZONING | LOT COUNT (TENTATIVE MAP) | TOTAL PERMITS ISSUED | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | HOMEBUILDER |
|---------------|-------|---------|--------------|--------|---------------------------|----------------------|--|-------------------------|-----------------------------|-------------------------------|-------------|
| MANGINI RANCH | 1     | 1       | AZURE        | SFHD   | 108                       | 108                  | 100.00%                                      | 1                       | 107                         | 99.07%                        | TAYLOR MOR  |
| MANGINI RANCH | 1     | 2       | DAKOTA       | SFHD   | 98                        | 98                   | 100.00%                                      | 1                       | 97                          | 98.98%                        | TAYLOR MOR  |
| MANGINI RANCH | 1     | 3       | BROOKSTONE   | SFHD   | 52                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         | TRI POIN    |
| MANGINI RANCH | 1     | 4       | WATERSTONE   | SFHD   | 85                        | 43                   | 50.59%                                       | 43                      | 0                           | 0.00%                         | TRI POIN    |
| MANGINI RANCH | 1     | 5       | BROOKSTONE   | SFHD   | 88                        | 86                   | 97.73%                                       | 19                      | 67                          | 76.14%                        | TAYLOR MOR  |
| MANGINI RANCH | 1     | 6       | VILLAGE 6    | SFHD   | 116                       | 54                   | 46.55%                                       | 25                      | 29                          | 25.00%                        | TAYLOR MOR  |
| MANGINI RANCH | 1     | 7       | VILLAGE 7    | SFHD   | 108                       | 64                   | 59.26%                                       | 48                      | 16                          | 14.81%                        | LENNAR/CAL  |
| MANGINI RANCH | 1     | 8       | OAKLEAF      | SFHD   | 78                        | 78                   | 100.00%                                      | 1                       | 77                          | 98.72%                        | LENNAR/CAL  |
| MANGINI RANCH | 1     | 9       | COPPERWOOD   | SFHD   | 103                       | 103                  | 100.00%                                      | 1                       | 102                         | 99.03%                        | LENNAR/CAL  |
| <b>TOTALS</b> |       |         |              |        | <b>836</b>                | <b>634</b>           | <b>75.84%</b>                                | <b>139</b>              | <b>495</b>                  | <b>59.21%</b>                 |             |

| AREA          | PHASE | VILLAGE | VILLAGE NAME | ZONING | LOT COUNT (TENTATIVE MAP) | TOTAL PERMITS ISSUED | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | HOMEBUILDER |
|---------------|-------|---------|--------------|--------|---------------------------|----------------------|--|-------------------------|-----------------------------|-------------------------------|-------------|
| MANGINI RANCH | 2     | 1       | VILLAGE 1    | SFHD   | 88                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 2       | VILLAGE 2    | SFHD   | 74                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 3       | VILLAGE 3    | SFHD   | 53                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 4       | VILLAGE 4    | SFHD   | 73                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 5       | VILLAGE 5    | SFHD   | 83                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 6       | VILLAGE 6    | SFHD   | 70                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| MANGINI RANCH | 2     | 7       | VILLAGE 7    | MLD    | 68                        | 3                    | 4.41%  | 3                       | 0                           | 0.00%                         | SIGNATU     |
| MANGINI RANCH | 2     | 8       | VILLAGE 8    | MLD    | 36                        | 2                    | 5.56%  | 2                       | 0                           | 0.00%                         | KB H        |
| MANGINI RANCH | 2     | 10      | ROCKCRESS    | SFHD   | 118                       | 4                    | 3.39%  | 4                       | 0                           | 0.00%                         | LENNAR/CAL  |
| <b>TOTALS</b> |       |         |              |        | <b>663</b>                | <b>9</b>             | <b>1.36%</b>                                 | <b>9</b>                | <b>0</b>                    | <b>0.00%</b>                  |             |

| AREA          | PHASE | VILLAGE | VILLAGE NAME | ZONING   | LOT COUNT (TENTATIVE MAP) | TOTAL PERMITS ISSUED | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | HOMEBUILDER |
|---------------|-------|---------|--------------|----------|---------------------------|----------------------|--|-------------------------|-----------------------------|-------------------------------|-------------|
| RUSSELL RANCH | 1     | 1       | GOLDEN HILLS | SF/SFHD* | 52                        | 11                   | 21.15%                                       | 9                       | 2                           | 3.85%                         | THE NEW     |
| RUSSELL RANCH | 1     | 2       | GOLDEN HILLS | SF       | 25                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| RUSSELL RANCH | 1     | 3       | SILVER CREEK | SF       | 76                        | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         |             |
| <b>TOTALS</b> |       |         |              |          | <b>153</b>                | <b>11</b>            | <b>7.19%</b>                                 | <b>9</b>                | <b>2</b>                    | <b>3.85%</b>                  |             |

| AREA                    | PHASE | VILLAGE | VILLAGE NAME | ZONING | LOT COUNT (TENTATIVE MAP) | TOTAL PERMITS ISSUED | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | HOMEBUILDER    |
|-------------------------|-------|---------|--------------|--------|---------------------------|----------------------|--|-------------------------|-----------------------------|-------------------------------|----------------|
| ENCLAVE AT FOLSOM RANCH | NONE  | NONE    | NONE         | MLD    | 111                       | 10                   | 9.01%  | 8                       | 2                           | 1.80%                         | KB HOMES OF CA |
| <b>TOTALS</b>           |       |         |              |        | <b>111</b>                | <b>10</b>            | <b>9.01%</b>                                 | <b>8</b>                | <b>2</b>                    | <b>1.80%</b>                  |                |

| AREA          | PHASE | VILLAGE | VILLAGE NAME | ZONING | LOT COUNT (TENTATIVE MAP) | TOTAL PERMITS ISSUED | % BUILD OUT (ISSUED PERMITS/ TEN. LOT TOTAL) | LOTS UNDER CONSTRUCTION | LOTS WITH CERT OF OCC. (CO) | % FINALED (CO/TEN. LOT TOTAL) | HOMEBUILDER   |
|---------------|-------|---------|--------------|--------|---------------------------|----------------------|--|-------------------------|-----------------------------|-------------------------------|---------------|
| TOLL BROTHERS | NONE  | NONE    | NONE         | SFHD   | 598                       | 0                    | 0.00%  | 0                       | 0                           | 0.00%                         | TOLL BROTHERS |
| <b>TOTALS</b> |       |         |              |        | <b>598</b>                | <b>0</b>             | <b>0.00%</b>                                 | <b>0</b>                | <b>0</b>                    | <b>0.00%</b>                  |               |

854 Building Permits Issued  
561 Homes Final Inspected



**KEY: #**

Parcel Maps, Large Lot Final Maps, and Small Lot Final Maps

| TM/PM Map Number   | Parcel Map / Subdivision Map Name                       | Number of Mapped Lots (S/L/M) | Date Approved | Date Recorded | Document ID, A.M. or B.M. |      |
|--------------------|---|-------------------------------|---------------|---------------|---------------------------|------|
| 1                  | Parcel Map  | 0                             | 10/11/2002    | 10/11/2002    | 258 P.M. 17               |      |
| 2                  | Parcel Map  | 0                             | 3/29/2003     | 3/29/2003     | 218 P.M. 9                |      |
| 3                  | PH 14228 Parcel Map                                     | 0                             | 5/27/2005     | 5/28/2005     | 233 P.M. 14               |      |
| 4                  | Mangini Ranch LLFM                                      | 0                             | 10/2/2005     | 10/2/2005     | 264 M.M. 14               |      |
| 5                  | Mangini Ranch LLFM                                      | 0                             | 5/28/2007     | 4/9/2007      | 385 M.M. 10               |      |
| 6                  | Russel Ranch LLFM                                       | 0                             | 5/12/2007     | 5/21/2007     | 348 B.M. 1                |      |
| 7                  | Folsom Heights LLFM                                     | 0                             | 12/15/2007    | 12/27/2007    | 405 M.M. 8                |      |
| 8                  | Mangini Ranch Phase 1 Village 1 FM                      | 108                           | 5/12/2008     | 5/23/2008     | 403 B.M. 4                |      |
| 9                  | Mangini Ranch Phase 1 Village 2 FM                      | 102                           | 5/28/2008     | 5/31/2008     | 402 B.M. 3                |      |
| 10                 | Mangini Ranch Phase 1 Village 3 FM                      | 78                            | 5/28/2008     | 5/31/2008     | 402 B.M. 4                |      |
| 11                 | PH 14205 Parcel Map                                     | 0                             | 6/12/2008     | 6/26/2008     | 232 P.M. 17               |      |
| 12                 | Mangini Ranch Phase 1 Village 3 FM                      | 68                            | 5/28/2008     | 7/2/2008      | 402 B.M. 7                |      |
| 13                 | Russel Ranch Phase 1 LLFM                               | 0                             | 10/23/2008    | 10/30/2008    | 407 B.M. 1                |      |
| 14                 | White Rock Springs Ranch LLFM                           | 0                             | 11/13/2008    | 11/20/2008    | 407 B.M. 6                |      |
| 15                 | Russel Ranch Phase 1 Village 6 FM                       | 45                            | 3/26/2009     | 3/27/2009     | 410 B.M. 7                |      |
| 16                 | Russel Ranch Phase 1 Village 1 FM                       | 52                            | 3/26/2009     | 4/2/2009      | 410 B.M. 6                |      |
| 17                 | Russel Ranch Phase 1 Village 7 FM                       | 41                            | 3/26/2009     | 4/2/2009      | 410 B.M. 5                |      |
| 18                 | Russel Ranch Phase 1 Village 2 FM                       | 35                            | 3/26/2009     | 4/2/2009      | 410 B.M. 6                |      |
| 19                 | Russel Ranch Phase 1 Village 3 FM                       | 35                            | 3/26/2009     | 4/2/2009      | 410 B.M. 7                |      |
| 20                 | Russel Ranch Phase 1 Village 8 FM                       | 51                            | 4/8/2009      | 4/15/2009     | 411 B.M. 2                |      |
| 21                 | Russel Ranch Phase 1 Village 5 FM                       | 41                            | 4/8/2009      | 4/15/2009     | 411 B.M. 3                |      |
| 22                 | Mangini Ranch West Parcel Map (Parcel 3, 218 PM 17)     | 0                             | 5/24/2009     | 5/23/2009     | 236 P.M. 9                |      |
| 23                 | Mangini Ranch West Parcel Map (Parcel 1 & 5, 218 PM 17) | 0                             | 5/24/2009     | 6/2/2009      | 236 P.M. 10               |      |
| 24                 | Russel Ranch Phase 1 Village 4 FM                       | 114                           | 6/30/2009     | 6/21/2009     | 412 B.M. 4                |      |
| 25                 | Mangini Ranch Phase 2 LLFM                              | 0                             | 5/26/2009     | 7/2/2009      | 412 B.M. 7                |      |
| 26                 | Carr Trust Final Map                                    | 38                            | 7/29/2009     | 3/29/2010     | 414 B.M. 4                |      |
| 27                 | White Rock Springs Ranch Village 1 FM                   | 83                            | 7/29/2009     | 3/29/2010     | 414 B.M. 3                |      |
| 28                 | Mangini Ranch Phase 1 Village 5 FM                      | 87                            | 8/24/2009     | 8/4/2009      | 416 B.M. 9                |      |
| 29                 | White Rock Springs Ranch Village 8, 9 FM                | 86                            | 10/15/2009    | 10/15/2009    | 417 B.M. 1                |      |
| 30                 | Mangini Ranch Phase 1 Village 6 FM                      | 112                           | 11/12/2009    | 11/20/2009    | 417 B.M. 8                |      |
| 31                 | Mangini Ranch Phase 1 Village 7 FM                      | 108                           | 11/12/2009    | 11/20/2009    | 417 B.M. 9                |      |
| 32                 | White Rock Springs Ranch Village 2 and 3 FM             | 111                           | 11/12/2009    | 10/16/2009    | 418 B.M. 9                |      |
| 33                 | White Rock Springs Ranch Village 4, 5, 6 and 7 FM       | 132                           | 12/14/2009    | 12/16/2009    | 418 B.M. 4                |      |
| 34                 | Mangini Ranch Phase 2 Village 7 FM                      | 68                            | 12/14/2009    | 12/17/2009    | 418 B.M. 5                |      |
| 35                 | PH 14288 Parcel Map Parcel 85A                          | 0                             | 5/26/2010     | 5/22/2010     | 240 P.M. 13               |      |
| Total Lots (S/L/M) |   |                               |               |               |                           | 2888 |

Note: For each lot count, Parcel Maps are not shown below.  
Approval Date for Parcel Maps is date approved by City Engineer. Approval Date for Final Maps is date approved by City Council.

**KEY: #**

Tentative Maps and Specific Plan Amendments

| TM/SPA Number | Tentative Map/SPA Map Name                           | Number of Mapped Lots (S/L/M) | Date Approved |
|---------------|--|-------------------------------|---------------|
| 1             | Folsom Plan Area Specific Plan                       | 0                             | 6/28/2011     |
| 2             | Russel Ranch SPA and Tentative Map                   | 638                           | 5/12/2015     |
| 3             | Mangini Ranch Phase 1 Tentative Map                  | 403                           | 5/23/2015     |
| 4             | Westland Eagle SPA                                   | 0                             | 8/22/2015     |
| 5             | White Rock Springs Tentative Map                     | 385                           | 5/22/2016     |
| 6             | Hillsborough SPA                                     | 0                             | 5/24/2016     |
| 7             | Carr Trust SPA and Tentative Map                     | 38                            | 5/24/2016     |
| 8             | Folsom Heights SPA                                   | 0                             | 6/28/2016     |
| 9             | Broadstone Estates SPA                               | 0                             | 6/28/2016     |
| 10            | Russel Ranch Tentative Map Amendment                 | 632                           | 6/28/2016     |
| 11            | The Enclave at Folsom Ranch Tentative Map            | 111                           | 1/19/2016     |
| 12            | Broadstone Estates Tentative Map                     | 111                           | 4/13/2017     |
| 13            | Folsom Heights Tentative Map                         | 530                           | 7/11/2017     |
| 14            | Mangini Ranch Phase 2 Tentative Map                  | 465                           | 3/13/2018     |
| 15            | Russel Ranch Lots 24 thru 32 SPA and Tentative Map   | 389                           | 3/13/2018     |
| 16            | Old Broadstone at Folsom Ranch SPA and Tentative Map | 306                           | 3/13/2018     |
| 17            | Enclave  | 71                            | 5/26/2020     |

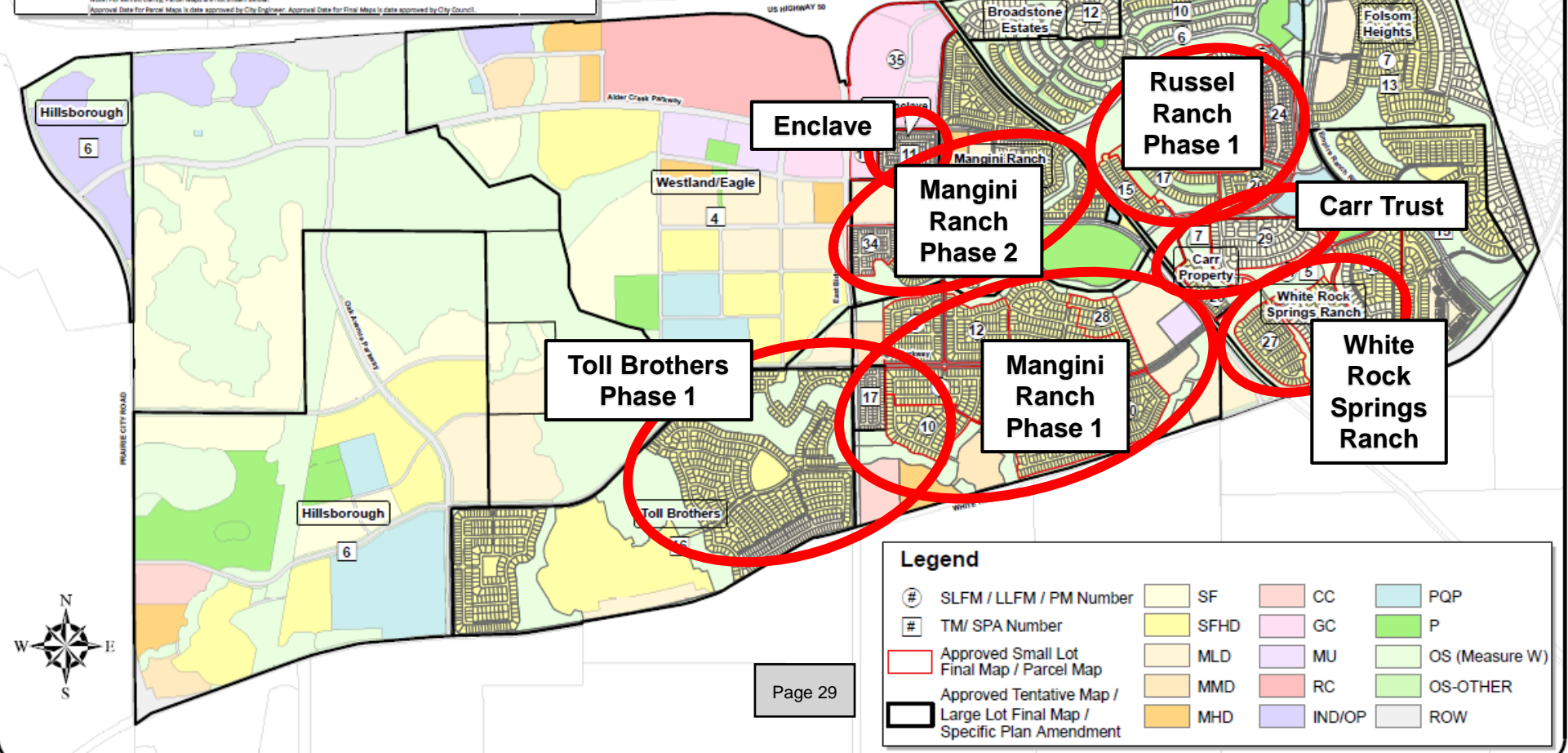
Note:  
1. Item #10 supercedes Item #2  
2. Item #15 swapped a portion of Item #10  
3. Item #16 swapped a portion of Item #10

# Folsom Plan Area Specific Plan Approved Entitlements and Final Maps

City of Folsom, California  
June, 2020



01/26/2021 Item No.2.



**Legend**

|   |  |      |        |                |
|---|--|------|--------|----------------|
| Ⓝ | SLFM / LLFM / PM Number  | SF   | CC     | PQP            |
| # | TM/ SPA Number   | SFHD | GC     | P              |
| Ⓜ | Approved Small Lot Final Map / Parcel Map                              | MLD  | MU     | OS (Measure W) |
| Ⓜ | Approved Tentative Map / Large Lot Final Map / Specific Plan Amendment | MMD  | RC     | OS-OTHER       |
|   |  | MHD  | IND/OP | ROW            |



# Mangini Ranch Phase 1 Neighborhoods

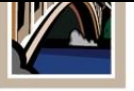




# Building Activity

## Mangini Ranch Phase 1 Builders

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

- Taylor Morrison (Villages 6, 7)
- Lennar (Villages 8, 9)
- Tri Pointe Homes (Villages 3 – 5)
- Tri-Pointe Homes (Creekstone)

**Lennar:  
Villages  
8 and 9**



**Tri-Pointe Homes: Creekstone**



**Tri-Pointe Homes:  
Village**

Page 31



**Taylor Morrison:  
Villages 6 - 7**



# Mangini Ranch Phase 2 and Enclave Neighborhoods



KB Homes (Soliel)

KB Homes (Enclave)

Signature Homes (Village 7)

Lennar Homes (Rockcross)

School Site

Park Site

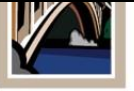
Fire Station



# Building Activity

## Mangini Ranch Phase 2 and Enclave Builders

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

- KB Homes (Enclave)
- KB Homes (Soliel)
- Signature Homes (Village 7)
- Lennar Homes (Rockcross)



**Lennar Homes: Rockcross**



**Signature Homes: Village 7**



**KB Homes: Soliel**



**KB Homes: Enclave**



# Russell Ranch Phase 1 Neighborhoods

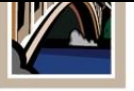




# Building Activity

## Russell Ranch Phase 1 Builders

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

- The New Home Company (Villages 1, 7)
- Meritage Homes (Village 4)
- Anthem United (Villages 6 and 8)



**New Home Company: Village 7**



**Meritage: Village 4**



**Anthem United: Villages 6 and 8**



**New Home Company: Village 1**



# Carr Trust and White Rock Springs Ranch Neighborhoods



**Grand Prairie Road**

**Rock Springs Ranch Road**

Richmond American Carr Trust/Village 1

JMC Homes Villages 8, 9

**Placerville Road**

**Mangini Parkway**

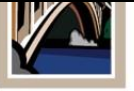
**White Rock Road**



# Building Activity

Carr Trust and White Rock Springs Ranch Builders

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

- Richmond American (Carr Trust/Village 1)
- JMC Homes (Villages 8 and 9)



**JMC Model Home Sites:  
Villages 8 and 9**



**Richmond American: Carr Trust**



# Toll Brothers at Folsom Ranch Neighborhoods

01/26/2021 Item No.2.

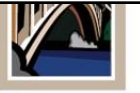


Toll Brothers  
Phase 1A, 1B and 1C



# Home Sales

Total sales 857 (Q4: October – December: 186)

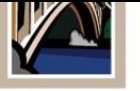


| Builder                                  | October                               | November | December |
|--|---------------------------------------|----------|----------|
| Taylor Morrison (Azure II and Dakota II) | 19                                    | 12       | 12       |
| Tri Pointe (Brookstone and Waterstone)   | 10                                    | 10       | 5        |
| Meritage (Steel Canyon)                  | 6                                     | 9        | 7        |
| Anthem United (Iron Ridge)               | 8                                     | 8        | 11       |
| New Home Company (SilverCrest)           | 4                                     | 6        | 6        |
| New Home Company (Gold Hills)            | 2                                     | 8        | 8        |
| Richmond American (Seasons)              | 8                                     | 8        | 9        |
| KB Homes (Enclave)                       | 0                                     | 2        | 8        |
| KB Homes (Soleil)                        | <i>Model homes under construction</i> |          |          |
| JMC Homes                                | <i>Model homes under construction</i> |          |          |
| Signature Homes                          | <i>Model homes under construction</i> |          |          |
| Lennar (Rockcress)                       | <i>Model homes under construction</i> |          |          |
| Total                                    | 57                                    | 63       | 66       |



# Questions?

01/26/2021 Item No.2.



CITY OF  
**FOLSOM**

Quarterly presentations and additional project information can be found on the City's website:

[https://www.folsom.ca.us/community/planning/approved\\_master\\_plans/folsom\\_plan\\_area/default.asp](https://www.folsom.ca.us/community/planning/approved_master_plans/folsom_plan_area/default.asp)



# Folsom City Council Staff Report

|                        |   |
|------------------------|---|
| <b>MEETING DATE:</b>   | 1/26/2021                                 |
| <b>AGENDA SECTION:</b> | Scheduled Presentations                   |
| <b>SUBJECT:</b>        | Economic and Budget Overview Presentation |
| <b>FROM:</b>           | Finance Department                        |

### BACKGROUND / ISSUE

The Finance Director will provide a presentation on the Economic and Budget Overview of the current and upcoming Fiscal Year

Submitted,



---

Stacey Tamagni, Finance Director / CFO



# ECONOMIC AND BUDGET OVERVIEW

01/26/2021 Item No.3.



PRESENTATION TO THE  
FOLSOM CITY COUNCIL  
JANUARY 26, 2021

Page 42

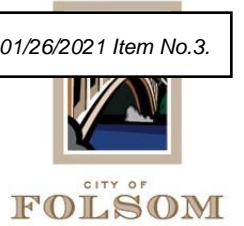


CITY OF  
**FOLSOM**



# Sales Tax Results

01/26/2021 Item No.3.



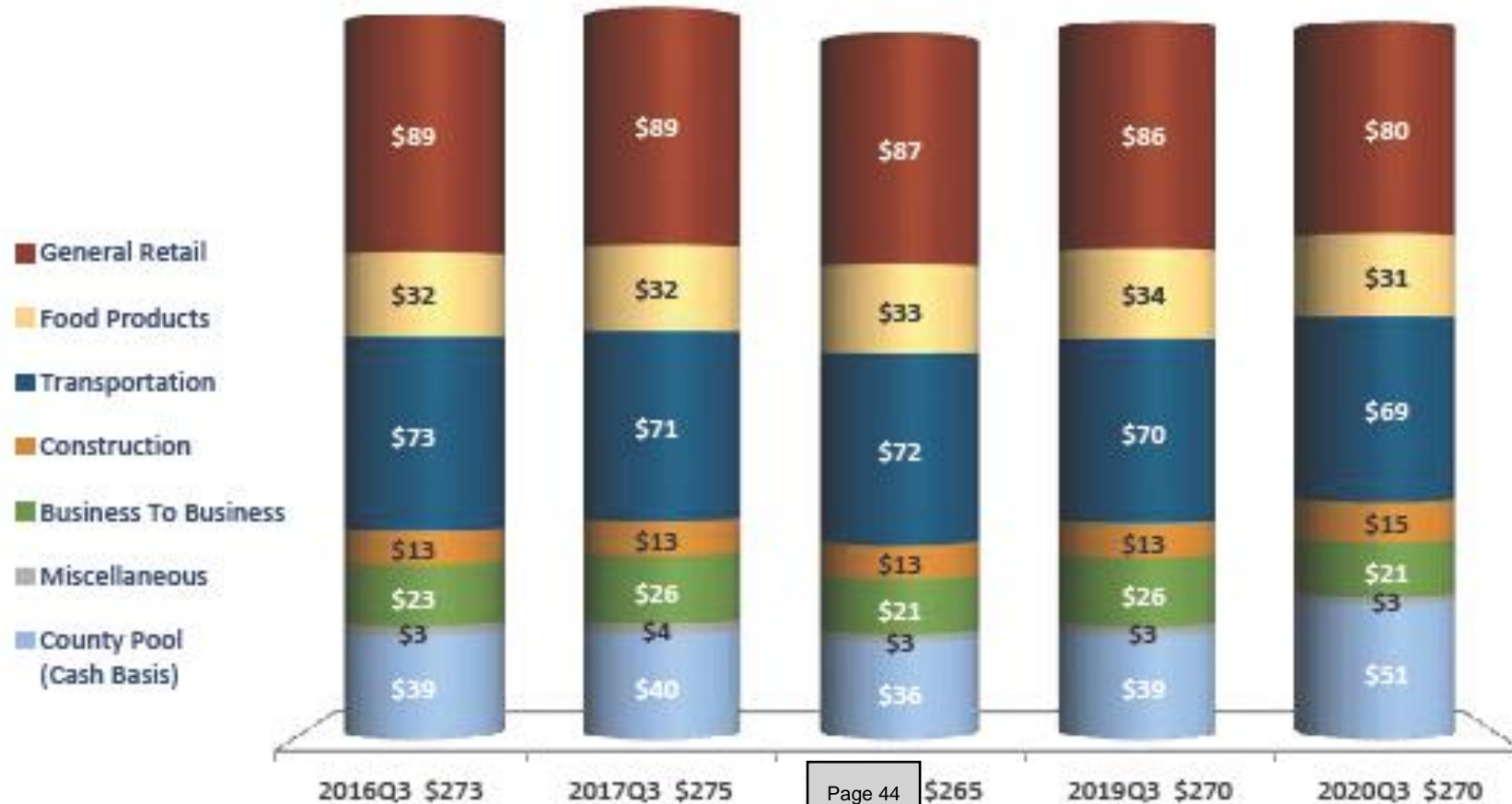
| Business Activity                    | Folsom       |               | Sacramento Valley |              | California    |               |
|--------------------------------------|--------------|---------------|-------------------|--------------|---------------|---------------|
|                                      | Quarter      | Annual        | Quarter           | Annual       | Quarter       | Annual        |
| General Retail                       | -7.6%        | -12.5%        | -4.0%             | -4.8%        | -14.2%        | -13.6%        |
| Food Products                        | -14.7%       | -12.2%        | -14.8%            | -11.1%       | -28.1%        | -18.4%        |
| Transportation                       | -0.4%        | -6.6%         | -1.5%             | -6.2%        | -12.8%        | -12.1%        |
| Construction                         | 21.7%        | 11.5%         | -4.7%             | 2.3%         | -12.1%        | -2.8%         |
| Business To Business                 | 1.6%         | -26.5%        | 1.6%              | -3.3%        | -13.6%        | -9.2%         |
| <b>TOTAL LOCAL BUSINESS ACTIVITY</b> | <b>-4.4%</b> | <b>-11.1%</b> | <b>-4.6%</b>      | <b>-5.3%</b> | <b>-16.7%</b> | <b>-12.4%</b> |
| <b>COUNTYWIDE POOL ACTIVITY</b>      | <b>38.0%</b> | <b>22.8%</b>  | <b>44.7%</b>      | <b>32.8%</b> | <b>40.5%</b>  | <b>28.4%</b>  |



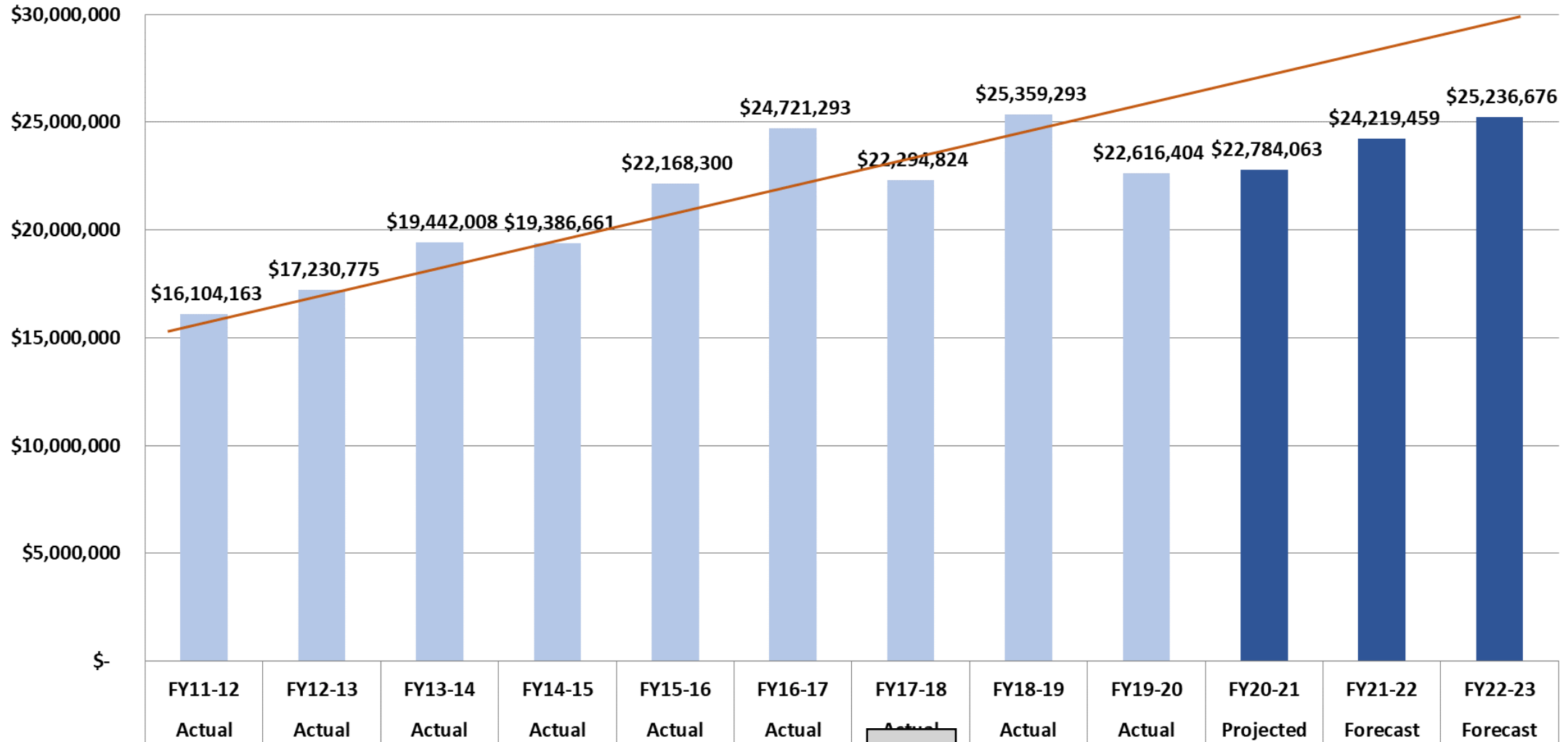
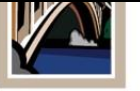
# Sales Tax Results



**Folsom**  
Annual Per Capita Sales Tax  
Adjusted for Inflation  
(Constant 2016 \$)



# Sales Tax Totals





# Major Revenue Categories Impacted by COVID-19 – Budgeted vs. Projected

01/26/2021 Item No.3.

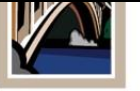


CITY OF  
**FOLSOM**

|                    | <b>FY 20-21<br/>Budgeted</b> | <b>FY 20-21<br/>Projected</b> | <b>Over/(Under)<br/>Budget</b> | <b>% of<br/>Budget</b> |
|--------------------|------------------------------|-------------------------------|--------------------------------|------------------------|
| Sales Tax          | 22,784,063                   | 22,784,063                    | -                              | 100.00%                |
| TOT                | 1,255,000                    | 1,255,000                     | -                              | 100.00%                |
| Parks & Recreation | 2,697,445                    | 1,228,896                     | (1,468,549)                    | 45.56%                 |
| Ambulance Fees     | 4,450,000                    | 4,025,000                     | (425,000)                      | 90.45%                 |

# Looking Ahead...

01/26/2021 Item No.3.



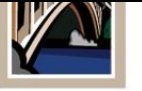
CITY OF  
**FOLSOM**

Sales tax projected to recover to FY 18/19 levels within three years, resulting in two to three years of lost growth potential.

Ongoing pressure on the ability to reverse deep cuts made to balance the FY 20/21 budget.

Reaching budget projections in some categories means estimated losses were accurate, not that revenue sources are at “normal” levels.

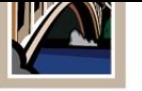




# Budget Principles

# The budget should:

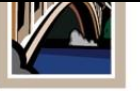
01/26/2021 Item No.3.



CITY OF  
**FOLSOM**

- Maintain the functional balance of services that provide the unique Folsom experience.
- Allocate financial resources based on functional priorities and programmatic goals.
- Ensure that the financial stability of the City is sustainable beyond the next fiscal year.
- Maintain effectiveness of our primary services and functions.
- Maintain or grow the general fund balance.
- Consider alternative service delivery models in order to preserve services to the community.
- Be transparent to the public.
- Be accountable for results.
- Be responsive to the community.





# QUESTIONS / COMMENTS

# City Council Special Meeting

## MINUTES

Tuesday, January 12, 2021 6:15 PM

---

***Pursuant to Governor Newsom’s Executive Order N-29-20, members of the Folsom City Council and staff may participate in this meeting via teleconference.***

### **CALL TO ORDER**

The special City Council meeting was called to order at 6:15 p.m. in City Council Chambers, 50 Natoma Street, Folsom, California, with Mayor Mike Kozlowski presiding.

### **ROLL CALL:**

Councilmembers Present: Sarah Aquino, Vice Mayor  
YK Chalamcherla, Councilmember  
Kerri Howell, Councilmember  
Rosario Rodriguez, Councilmember  
Mike Kozlowski, Mayor

Councilmembers Absent: None

Participating Staff: City Manager Elaine Andersen  
City Attorney Steve Wang  
City Clerk Christa Freemantle

### **ADJOURNMENT TO CLOSED SESSION FOR THE FOLLOWING PURPOSES:**

1. Conference with Legal Counsel – Existing Litigation – Pursuant to Government Code Section 54956.9(d)(1): Scott Vestal v. City of Folsom, Workers’ Compensation Appeals Board Case Nos. ADJ8794702 and ADJ12519053

**Motion by Councilmember Kerri Howell, second by Mayor Mike Kozlowski to adjourn to closed session for the above referenced item. Motion carried with the following roll call vote:**

**AYES: Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): None**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

### **RECONVENE**



City Attorney Steve Wang announced that no final action was taken during Closed Session.

**ADJOURNMENT**

There being no further business to come before the Folsom City Council, the meeting was adjourned at 6:30 p.m.

SUBMITTED BY:

\_\_\_\_\_  
Christa Freemantle, City Clerk

ATTEST:

\_\_\_\_\_  
Mike Kozlowski, Mayor

# City Council Regular Meeting

## MINUTES

Tuesday, January 12, 2021 6:30 PM

---

***Pursuant to Governor Newsom's Executive Order N-29-20, members of the Folsom City Council and staff may participate in this meeting via teleconference.***

### **CALL TO ORDER**

The regular City Council meeting was called to order at 6:30 p.m. in City Council Chambers, 50 Natoma Street, Folsom, California, with Mayor Mike Kozlowski presiding.

### **ROLL CALL:**

Councilmembers Present: Sarah Aquino, Vice Mayor  
YK Chalamcherla, Councilmember  
Kerri Howell, Councilmember  
Rosario Rodriguez, Councilmember  
Mike Kozlowski, Mayor

Councilmembers Absent: None

Participating Staff: City Manager Elaine Andersen  
City Attorney Steve Wang  
City Clerk Christa Freemantle  
Public Works Director Dave Nugen  
City Engineer Steve Krahn

### **PLEDGE OF ALLEGIANCE**

The Pledge of Allegiance was recited.

### **AGENDA UPDATE**

City Clerk Christa Freemantle advised that there was an update for Item No. 11.

### **BUSINESS FROM THE FLOOR:**

Mike Brenkwitz addressed the City Council regarding parking in the Historic District.



**SCHEDULED PRESENTATIONS:**

1. City of Folsom Resolution of Commendation Honoring Folsom Mask Makers for their Efforts to Meet PPE Demands During the COVID-19 Pandemic

Karla Burgess and Karen Hamer from Folsom Mask Makers joined the meeting by teleconference and thanked the City Council for the resolution of commendation.

Mayor Mike Kozlowski read the resolution of commendation.

**CONSENT CALENDAR:**

2. Approval of December 7, 2020 Special Meeting Minutes
3. Approval of December 8, 2020 Special and Regular Meeting Minutes
4. **pulled for discussion**
5. Resolution No. 10576 - A Resolution Authorizing Staff to Submit Active Transportation Program Grant Applications to the California Transportation Commission and the Sacramento Area Council of Governments for the Riley Street Sidewalk Project
6. **pulled for discussion**
7. Resolution No. 10578 - A Resolution Authorizing the Finance Director to Appropriate an Additional \$60,000 to the General Capital Fund (Fund 445) for the Purchase of a Computer Server
8. Resolution No. 10579 - A Resolution Authorizing the City Manager to Execute Amendment No. 1 to the Design and Consulting Services Contract with R.E.Y. Engineers, Inc. for the Natoma Street Drainage Phase 2 Project
9. Resolution No. 10580 - A Resolution Approving an Appropriation in Fiscal Year 2020-21 to be used for a Replacement Facility Services Vehicle

**Motion by Councilmember Kerri Howell, second by Councilmember Rosario Rodriguez to approve Consent Calendar Items Nos. 1-3, 5 and 7-9.**

**Motion carried with the following roll call vote:**

**AYES: Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): None**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

Councilmember YK Chalamcherla pulled Item No. 4 for discussion.

Vice Mayor Sarah Aquino pulled Item No. 6 to address an email received regarding the item.

**CONSENT CALENDAR ITEMS PULLED FOR DISCUSSION:**

4. Ordinance No. 1310 - An Uncodified Ordinance Adopting Prima Facie Speed Limits on Alder Creek Parkway, Bidwell Street, Green Valley Road, Glenn Drive, Iron Point Road, Mangini Parkway, Natoma Station Drive, Parkshore Drive, Parkway Drive, Santa Juanita Drive, and Sibley Street (Second Reading and Adoption)

Councilmember YK Chalamcherla expressed concern about increasing speed limits.

Public Works Director Dave Nugen responded.

**Motion by Councilmember Kerri Howell, second by Vice Mayor Sarah Aquino to approve Ordinance No. 1310.**

**Motion carried with the following roll call vote:**

**AYES: Councilmember(s): Aquino, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): Chalamcherla**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

6. Resolution No. 10577 - A Resolution Authorizing the City Manager to Execute a Subdivision Improvement Agreement and Accept Offers of Dedication for the Rockcross Subdivision, and Approval of the Final Map for the Rockcross Subdivision

Vice Mayor Sarah Aquino shared a resident's emailed concerns regarding the final map approval process.

City Engineer Steve Krahn responded.

**Motion by Vice Mayor Sarah Aquino, second by Councilmember Kerri Howell to approve Resolution No 10577.**

**Motion carried with the following roll call vote:**

**AYES: Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): None**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

**NEW BUSINESS:**

10. Resolution No. 10575 - A Resolution of the City Council of the City of Folsom Declaring Its Intent to Initiate Procedures to Transition from At-Large Elections to District-Based Elections Pursuant to California Elections Code Section 10010 and Authorize Related Actions

City Attorney Steve Wang made a presentation and responded to questions from the City Council.



The following speakers addressed the City Council regarding district-based elections:

1. Bruce Cline in opposition
2. Kevin Duewel in opposition
3. Bob Holderness in opposition
4. Aaron Silva in opposition
5. Marko Mlikotin in opposition
6. Vijay Vonnalagadda in support

City Clerk Christa Freemantle read into the record emails to the City Council from the following regarding district-based elections:

1. Rizwan Hussain in support
2. Muriel Brounstein in support
3. Clarence Macaspac in support
4. Lydia Wolfe-Clark in support
5. Kristina Lecina in support
6. Judy Leveque in support
7. Andrea Targos in support
8. Kavita Sood in support
9. Chris Yatooma in support
10. LaRaine Therre in support
11. Cheryl Davis in support
12. William Davis in support
13. Teresa Garcia in support
14. Karen Ruesel in support
15. Tony Oliver & Kristine Mooreland in support
16. John Wright in support
17. Bernard Dooley in support
18. Robert Dresser in support
19. Nancy Moore in support
20. Anonymous in support
21. Christopher Baker in opposition
22. Captain Curt Taras in opposition
23. Scott Rafferty in support
24. Carlos Alcala in support
25. Justin Raithel in opposition

City Manager Elaine Andersen read into the record an email from Ian Cornell in opposition.

There was further discussion and clarification between the City Council and staff.

**Motion by Councilmember Kerri Howell to continue the item at least 30 days.**

**After further discussion, Councilmember Kerri Howell agreed to a modified motion to table [the matter] to a future meeting [date unspecified], second by Councilmember Rosario Rodriguez.**

**Motion carried with the following roll call vote:**

**AYES: Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): None**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

- 11. At-Large Appointments to the Arts and Cultural Commission, Historic District Commission, Landscaping and Lighting District Advisory Committee, Library Commission, Parks and Recreation Commission, Planning Commission, Traffic Safety Committee and Utility Commission

City Clerk Christa Freemantle made a presentation, briefly explaining the open ballot process the City Council will use in making commission appointments. She provided ballots to each Councilmember.

**Arts and Cultural Commission (two at-large seats)**

Councilmember YK Chalamcherla voted for Lucinda Woodward and Jun Zhang.  
Councilmember Kerri Howell voted for Marc Allaman and Chad Vanderveen.  
Vice Mayor Sarah Aquino voted for Marc Allaman and Lucinda Woodward.  
Councilmember Rosario Rodriguez voted for Lucinda Woodward and Jun Zhang.  
Mayor Mike Kozlowski voted for Marc Allaman and Lucinda Woodward.

Marc Allaman and Lucinda Woodward were appointed to the Arts and Cultural Commission.

**Historic District Commission (representing Architect/Landscape seat)**

**Mickey Ankehelyi was the only applicant for this seat and was appointed by the following roll call vote:**

**AYES: Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski**  
**NOES: Councilmember(s): None**  
**ABSENT: Councilmember(s): None**  
**ABSTAIN: Councilmember(s): None**

**Landscaping and Lighting District Advisory Committee**

City Clerk Christa Freemantle explained that for each of the districts with applications there is only one applicant.

Councilmember Kerri Howell requested to approve all applicants for the seats on the Landscaping and Lighting District Advisory Committee. The following applicants were appointed:



Allen Brown – American River Canyon North  
David Weizer – American River Canyon #2  
Patty Soulsby – Blue Ravine Oaks  
Kathy Kennedy – Steeplechase  
Ian Cornell – Willow Creek South  
Janine Ferrer – Willow Springs

**Approved by the following roll call vote:**

**AYES:** Councilmember(s): Aquino, Chalamcherla, Howell, Rodriguez, Kozlowski  
**NOES:** Councilmember(s): None  
**ABSENT:** Councilmember(s): None  
**ABSTAIN:** Councilmember(s): None

**Library Commission (two at-large seats)**

Councilmember YK Chalamcherla voted for Ann Marie Hutto and Justin Sanders.  
Councilmember Rosario Rodriguez voted for Ann Marie Hutto and Jamie Lopez.  
Mayor Mike Kozlowski voted for Ann Marie Hutto and Jamie Lopez.  
Councilmember Kerri Howell voted for Ann Marie Hutto and Jun Zhang.  
Vice Mayor Sarah Aquino voted for Ann Marie Hutto and Jun Zhang.

Ann Marie Hutto was appointed to the Library Commission.

City Clerk Christa Freemantle explained that since there was not a majority vote for the second seat, the Council would need to vote again.

Councilmember YK Chalamcherla changed his vote from Justin Sanders to Jun Zhang, which gave Jun Zhang a majority vote for appointment.

Jun Zhang was appointed to the Library Commission.

**Parks and Recreation Commission (two at-large seats)**

Councilmember Kerri Howell voted for Dave Nazworth and Paul Romero.  
Vice Mayor Sarah Aquino voted for Dave Nazworth and Brian Wallace.  
Councilmember YK Chalamcherla voted for Mark Moore and Dave Nazworth.  
Councilmember Rosario Rodriguez voted for Dave Nazworth and Brian Wallace.  
Mayor Mike Kozlowski voted for Mark Moore and Brian Wallace.

Dave Nazworth and Brian Wallace were appointed to the Parks and Recreation Commission.

**Planning Commission (two at-large seats)**

Councilmember YK Chalamcherla voted for Kevin Duewel and Barbara Leary.  
Vice Mayor Sarah Aquino voted for Kevin Duewel and Barbara Leary.  
Councilmember Kerri Howell voted for Kevin Duewel and Barbara Leary.  
Mayor Mike Kozlowski voted for Kevin Duewel and Barbara Leary.  
Councilmember Rosario Rodriguez voted for Kevin Duewel and Barbara Leary.

Kevin Duewel and Barbara Leary were appointed to the Planning Commission.

**Traffic Safety Committee**

**(three at-large seats: two citizen representatives, one bicycle/pedestrian safety representative)**

Councilmember YK Chalamcherla voted for Scott Bailey and Gary Bolin (Citizen Rep), Bob Delp (Bicycle/Pedestrian).  
Councilmember Rosario Rodriguez voted for Scott Bailey and David Soulsby (Citizen Rep), Tony Truppa (Bicycle/Pedestrian).  
Vice Mayor Sarah Aquino voted for Kevin Goddard and David Soulsby (Citizen Rep), Bob Delp (Bicycle/Pedestrian).  
Councilmember Kerri Howell voted for Scott Bailey and Mark Moore (Citizen Rep), Bob Delp (Bicycle/Pedestrian).  
Mayor Mike Kozlowski voted for Gary Bolland and Chad Vander Veen (Citizen Rep), Tony Truppa (Bicycle/Pedestrian).

Bob Delp was appointed as the Bicycle/Pedestrian Safety Representative.  
Scott Bailey was appointed as a Citizen Representative.

City Clerk Christa Freemantle explained there was no majority vote for the second Citizen Representative seat.

Mayor Mike Kozlowski changed his vote from Chad Vander Veen to David Soulsby, giving David Soulsby a majority vote.

David Soulsby was appointed as a Citizen Representative.

**Utility Commission (two at-large seats)**

Councilmember YK Chalamcherla voted for Daniel Groat and Mark Moore.  
Vice Mayor Sarah Aquino voted for George Condon and Daniel Groat.  
Councilmember Kerri Howell voted for Daniel Groat and Robert Hess.  
Councilmember Rosario Rodriguez voted for Daniel Groat and Robert Hess.  
Mayor Mike Kozlowski voted for Robert Hess and Mark Moore.

Daniel Groat and Robert Hess were appointed to the Utility Commission.

**CITY MANAGER REPORTS:**

City Manager Elaine Andersen spoke of upcoming free hand sanitizer distribution events, provided an update regarding the ongoing General Plan Housing Element and the upcoming virtual annual State of the City address with Mayor Mike Kozlowski.

**COUNCIL COMMENTS:**

Councilmember Rosario Rodriguez wished everyone a happy new year and expressed excitement that Sacramento County is now in the purple COVID tier; she encouraged everyone to continue to wear their masks. She thanked all the applicants who applied for the commission and committee seats and congratulated those who were appointed.

Councilmember YK Chalamcherla thanked the City Manager and her team for hosting the hand sanitizer distribution events and discussed how difficult it was to choose appointments for the commissions and committees. He encouraged everyone to stay involved and to keep trying if they did not get a seat this time. He wished all a happy new year.

Vice Mayor Sarah Aquino discussed the HART of Folsom Winter Shelter and thanked them for stepping up to help the homeless. She requested the Mayor put the governance handbook on a future agenda and asked that the meeting be adjourned in honor of Ronald Pew who was the Chair of the Traffic Safety Committee as well as a CAPS volunteer for the Police Department who recently passed away.

Councilmember Kerri Howell added a request to also adjourn the meeting in honor of Dave West who was a founding member of Folsom Lake Bank as well as a participant in a number of Folsom activities who also passed away recently. She encouraged all to slow down while driving.

**ADJOURNMENT**

There being no further business to come before the Folsom City Council, Mayor Mike Kozlowski adjourned the meeting in memory of Ronald Pew and Dave West at 9:12 p.m.

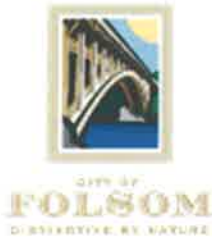
SUBMITTED BY:

\_\_\_\_\_  
Christa Freemantle, City Clerk

ATTEST:

\_\_\_\_\_  
Mike Kozlowski, Mayor





# Folsom City Council Staff Report

|                        |  |
|------------------------|--|
| <b>MEETING DATE:</b>   | 1/12/2021  |
| <b>AGENDA SECTION:</b> | Consent Calendar   |
| <b>SUBJECT:</b>        | Resolution No. 10581 - A Resolution Authorizing the City Manager to Execute a Consultant Agreement with WLC Architects for Architectural Services for the Folsom Police Station Rehabilitation Project |
| <b>FROM:</b>           | Police Department  |

### **RECOMMENDATION / CITY COUNCIL ACTION**

The Police Department recommends that the City Council pass and adopt Resolution No. 10581 - A Resolution Authorizing the City Manager to Execute a Consultant Agreement with WLC Architects for Architectural Services for the Folsom Police Station Rehabilitation Project.

### **BACKGROUND / ISSUE**

The existing Police Department Building was constructed in 1991 as part of the overall City Hall Campus and has served the Department for close to 30 years. From 1991 to present time there has been many changes in growth of the City, growth of the Department, Technology, and Policing Standards. The current facility has outlived its effective life and functionality. At this time it has been determined that rehabilitating and expanding the existing facility is more cost effective than relocating Police Services to another location within the City.

In July 2020 an request for proposal (RFP) for Preliminary Design and Schematic Design was advertised to determine Programming and Facility needs for the next 30 years. After review of five proposals and interview of the three shortlisted architectural firms, WLC Architects was selected to prepare the needed studies and preliminary design to guide the future design of the Police Department Building Rehabilitation Project. The proposed scope includes two phases and a site Boundary, Topographic, and Utility Survey.

Phase 1 – Preliminary Design includes the following to prepare a Functional Facility Assessment:

- Deficiency Assessment
- Space Needs Assessment
- Technical Needs Analysis
- Site Evaluation
- Phasing of Construction and Utilization
- Space Programming Guide
- Facilities Assessment Report

Phase 2 – Schematic Design

- Conceptual Site Plan (2 Alternatives)
- Building Plan Concept
- Conceptual Floor Plan
- Preliminary Interior Elevations
- Preliminary Structural System Plans
- Preliminary Mechanical and Plumbing System Plans
- Preliminary Electrical System Plans
- Preliminary Landscape Plans
- Preliminary Equipment List
- Preliminary Technology Infrastructure
- Preliminary Materials
- Preliminary Schedule
- Preliminary Budget

Upon completion and approval of the Preliminary and Schematic Design staff will present City Council a contract for Design Development Plans, Construction Plans and Documents.

### **POLICY / RULE**

Section 2.36.080, Award of Contracts of the Folsom Municipal Code states, in part, that contracts for supplies, equipment, services and construction with an estimated value of \$62,657 or greater shall be awarded by City Council.

### **ANALYSIS**

On July 31, 2020 the Folsom Police Department advertised an RFP for Architectural Services. Five Architectural Firms submitted proposals on September 10, 2020. Three firms were interviewed the week of October 26, 2020 with WLC Architects selected to negotiate scope and fee.

**FINANCIAL IMPACT**

WLC Architects proposes to provide the requested architectural services for a not-to-exceed amount of \$200,000. The Fiscal Year 2020-21 budget includes sufficient funding for the preliminary phase of this project. The funding is available in the Police Capital Fund (Fund 428).

**ENVIRONMENTAL REVIEW**

Anticipated to be a Categorical Exemption. The project is currently in the Preliminary Study Phase.

**ATTACHMENTS**

1. Resolution No. 10581 - A Resolution Authorizing the City Manager to Execute a Consultant Agreement with WLC Architects for Architectural Services for the Folsom Police Station Rehabilitation Project
2. WLC Architects Scope of Services

Submitted,

---

Rick Hillman, POLICE CHIEF



ATTACHMENT 1

**RESOLUTION NO. 10581**

**A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE A CONSULTANT AGREEMENT WITH WLC ARCHITECTS, INC. FOR ARCHITECTURAL SERVICES FOR THE FOLSOM POLICE STATION REHABILITATION PROJECT**

**WHEREAS**, the existing City of Folsom Police Department Building was built in 1991; and

**WHEREAS**, the City of Folsom desires to rehabilitate the existing Police Department Building for current and future needs; and

**WHEREAS**, the City of Folsom desires to enter into a contract with WLC Architects for preliminary studies and design; and

**WHEREAS**, a request for proposal (RFP) requesting Construction Engineering, Inspection and Materials Testing was advertised on July 31, 2020; and

**WHEREAS**, Proposals were provided on September 10, 2020 and Interviews conducted the week of October 26, 2020 with WLC Architects as the successful consultant to provide services in the amount of \$200,000; and

**WHEREAS**, there are sufficient funds budgeted and available in the amount of \$200,000 in the Police Capital Fund (Fund 428); and

**WHEREAS**, the agreement will be in a form acceptable to the City Attorney:

**NOW, THEREFORE, BE IT RESOLVED** that the City Council of the City of Folsom authorizes the City Manager to Execute a Consultant Agreement with WLC Architects, Inc. for \$200,000 for the Folsom Police Station Rehabilitation Project;

**PASSED AND ADOPTED** this 26<sup>th</sup> day of January 2021, by the following roll-call vote:

- AYES:** Councilmember(s):
- NOES:** Councilmember(s):
- ABSENT:** Councilmember(s):
- ABSTAIN:** Councilmember(s):

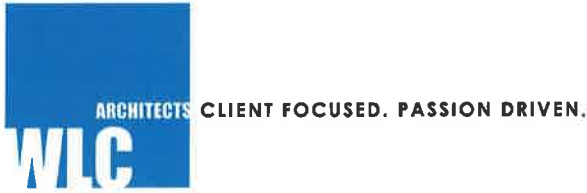
\_\_\_\_\_  
Michael D. Kozlowski, MAYOR

ATTEST:

\_\_\_\_\_  
Christa Freemantle, CITY CLERK

ATTACHMENT 2





November 6, 2020

Mr. Jason Browning  
Commander, Administration Bureau  
Folsom Police Department  
46 Natoma Street  
Folsom, CA 95630

Re: Proposal for Professional Design Services  
Folsom Police Station Rehabilitation Project

Dear Commander Browning,

WLC Architects, Inc. is pleased to submit this proposal for professional design services for the planned Police Department Rehabilitation Project. WLC acknowledges the project scope of services as indicated per the City's RFP document dated July 31, 2020.

#### **Phase One – Preliminary Design**

Prepare a Functional Facility Assessment including but not limited to the following:

- Deficiency Assessment
- Space Needs Analysis
- Technical Needs Analysis
- Site Evaluation
- Phasing of Construction and Utilization
- Space Programming Guide
- Facility Assessment Report

#### **Phase Two – Schematic Design**

Prepare the Schematic Design documents including but not limited to the following:

- Conceptual Site Plan (2 alternatives)
- Building Plan Concept (2 alternatives)
- Conceptual Floor Plan (2 alternatives)
- Preliminary Interior Elevations
- Preliminary Structural System Plans
- Preliminary Mechanical and Plumbing System Plans
- Preliminary Electrical System Plans
- Preliminary Landscape Plans
- Preliminary Equipment List
- Preliminary Technology Infrastructure

Mr. Jason Browning  
Proposal for Professional Design Services  
Folsom Police Station Rehabilitation Project  
November 6, 2020  
Page 2

- Preliminary Materials
- Preliminary Schedule
- Preliminary Budget

**Professional Design Fees (Lump Sum Fixed fee)**

- Phase One - \$ 62,750.00
- Phase Two - \$104,250.00

Estimated Reimbursable Expense Allowance of **\$2,000** for requested bulk reprographic printing, express mail and courier service shall be billed at cost without any mark-up.

**Optional Services (Upon PD/City Authorization)**

- Boundary and Topographical Survey - \$10,300.00

**Project Schedule**

We anticipate completion of each Phase services within these intervals, however, PD/City reviews, workshops, community engagement, formal presentations, etc. are not factored for now. Once we begin services, we can work with the PD/City team to fine tune a detailed schedule.

- Phase 1 Services – Three Months
- Phase 2 Services – Four Months

**Excluded Services Under This Proposal**

- Design Development Plans
- Construction Document Plans
- Bidding Assistance
- Construction Administration
- Geotechnical Soils Investigation and Report
- Tree Arborist Report

Mr. Jason Browning  
Proposal for Professional Design Services  
Folsom Police Station Rehabilitation Project  
November 6, 2020  
Page 3

**Hourly Rate Schedule**

For additional services, the attached hourly rates are proposed for the basis of fee negotiating. Hourly rates include all standard overhead costs. Any reimbursable costs above and beyond base contract items will be negotiated at the time additional services are requested.

Submitted By:



BILL LOUIE  
Architect, AIA  
Principal

BL:fi/20063-mkt

Enclosed: Hourly Rate Schedules



WLC ARCHITECTS, INC.  
2020 HOURLY RATE SCHEDULE

|                                  | Hourly Rates |
|----------------------------------|--------------|
| Principals of Firm               | \$250.00/hr  |
| Associate/Director/Coordinator   | \$220.00/hr  |
| Senior Project Architect/Manager | \$200.00/hr  |
| Project Architect/Manager        | \$170.00/hr  |
| Design Studio                    | \$120.00/hr  |
| Clerical                         | \$100.00/hr  |

Warren Consulting Engineers, Inc.  
HOURLY RATE SCHEDULE

|                 | Hourly Rates |
|-----------------|--------------|
| Principal       | \$215.00/hr  |
| Project Manager | \$175.00/hr  |
| Civil Engineer  | \$175.00/hr  |
| Civil Designer  | \$155.00/hr  |
| Drafter         | \$110.00/hr  |

MLA Structural Engineers, Inc.  
HOURLY RATE SCHEDULE

|                    | Hourly Rates |
|--------------------|--------------|
| Principal Engineer | \$165.00/hr  |
| Project Engineer   | \$ 95.00/hr  |
| Design Engineer    | \$ 85.00/hr  |
| Draftsperson       | \$ 50.00/hr  |
| Clerical           | \$ 40.00/hr  |

Pocock Design Solutions, Inc.  
HOURLY RATE SCHEDULE

|                 | Hourly Rates |
|-----------------|--------------|
| Principal       | \$200.00/hr  |
| Engineer        | \$175.00/hr  |
| Project Manager | \$165.00/hr  |
| Sr. Designer    | \$140.00/hr  |
| Designer        | \$120.00/hr  |
| CAD Drafting    | \$ 90.00/hr  |
| Clerical        | \$ 70.00/hr  |

A & F Engineering Group, Inc.  
HOURLY RATE SCHEDULE

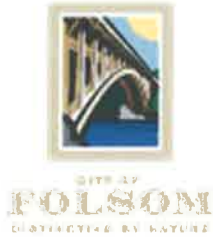
|                 | Hourly Rates |
|-----------------|--------------|
| Principal       | \$155.00/hr  |
| Engineer        | \$120.00/hr  |
| Project Manager | \$100.00/hr  |
| Sr. Designer    | \$ 90.00/hr  |
| Designer        | \$ 80.00/hr  |
| CAD Drafting    | \$ 70.00/hr  |
| Clerical        | \$ 50.00/hr  |

Wilson Design Studio Landscape Architecture  
HOURLY RATE SCHEDULE

|  | Hourly Rates |
|--|--------------|
| Principal Landscape Architect              | \$165.00/hr  |
| Senior Associate/Landscape Architect       | \$150.00/hr  |
| Senior Landscape Architect/Project Manager | \$135.00/hr  |
| Senior Landscape Designer/Project Manager  | \$110.00/hr  |
| Project Landscape Architect                | \$110.00/hr  |
| Landscape Designer I                       | \$ 90.00/hr  |
| Landscape Designer II                      | \$ 80.00/hr  |
| Admin/Clerical/Controller                  | \$ 75.00/hr  |

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# Folsom City Council Staff Report



|                        |   |
|------------------------|---|
| <b>MEETING DATE:</b>   | 1/26/2021   |
| <b>AGENDA SECTION:</b> | Consent Calendar  |
| <b>SUBJECT:</b>        | Resolution No. 10582 – A Resolution Authorizing the City Manager to Execute an Agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project |
| <b>FROM:</b>           | Environmental and Water Resources Department  |

### RECOMMENDATION / CITY COUNCIL ACTION

The Environmental and Water Resources Department recommends the City Council pass and adopt Resolution No. 10582 - A Resolution Authorizing the City Manager to Execute an Agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project.

### BACKGROUND / ISSUE

The Environmental and Water Resources (EWR) Department identifies infrastructure rehabilitation and replacement projects through water and sewer master plans, ongoing condition assessment programs, and regulatory changes. EWR staff completed an analysis of potential Water Treatment Plant (WTP) capacity and reliability projects. Through these efforts, EWR staff identified the Water Treatment Plant Backwash and Recycled Water Capacity Project as a priority project.

There are two Reclaimed Backwash ponds (RBW #1 and RBW #2) at the Water Treatment Plant that store water used to clean the filters, known as backwash water, and this backwash water can be recycled back to the headworks of the WTP. The US Environmental Protection Agency (EPA) allows water agencies to recycle up to 10% of the backwash water based on the water treatment plant capacity. The WTP’s current firm capacity is 35 million gallons per day (MGD), and 10% of the current firm capacity, or 3.5 MGD of backwash water, can be recycled back into the system. The WTP’s future firm capacity will be 50 MGD. This project will

increase redundancy and reliability to allow for 10% of the future firm capacity, or 5.0 MGD of backwash water, to be recycled back into the WTP system. Additionally, increasing the recycled water capacity greatly reduces the City's risk for the potential to overflow the RBW ponds.

The current piping configuration at the inlet of the RBW ponds only feeds RBW #2. This project will upgrade the piping arrangement to feed either RBW #1 or RBW #2 with isolation valves. Having this operational flexibility in feeding either pond will allow for the maintenance and cleaning of one pond at a time, while the other is still operating. This project also involves upgrading the submersible pumps in the decant pump station (DPS) at the outlet of the RBW ponds to meet the peak flow of approximately 5.0 MGD. Additionally, the DPS control system will be upgraded to provide improved operational controls and flexibility. The DPS wet well also has aging and leaking slide gates that will be replaced.

This resolution will authorize the City Manager to execute an agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project in the amount of \$116,526.

### **POLICY / RULE**

In accordance with Chapter 2.36 of the Folsom Municipal Code, supplies, equipment, services, and construction with a value of \$62,657 or greater shall be awarded by City Council.

### **ANALYSIS**

The Water Treatment Plant Backwash and Recycled Water Capacity Project will allow for reliability and redundancy in recycling backwash water of the water treatment process.

The modifications to the RBW ponds will allow for 10% of the WTP's future firm capacity of 50 MGD, or 5.0 MGD of backwash water, to be recycled back into the WTP system. The submersible pumps and SCADA control system will be upgraded to automate the DPS control system. Aging and leaking slide gates will be replaced along with upgrading the piping arrangement to feed either RBW #1 or RBW #2.

In 2018, the EWR Department completed a pre-qualification process for consultants for design and construction management services. The consulting firm HDR Engineering Inc. was one design firm selected to provide design and construction administration services for Water Treatment Plant projects through the pre-qualification process.

Design Services will include engineering drawings and project specifications suitable for a competitive bidding process per the City's requirements. HDR Engineering Inc., by reason of their statement of qualifications, past experience, and abilities for performing these types of services, are qualified to perform the required design services for this project.

The Environmental and Water Resources Department recommends that the City Council authorize the City Manager to execute an agreement with HDR Engineering Inc. for a not-to-exceed amount of \$116,526.

### **FINANCIAL IMPACT**

The Water Treatment Plant Backwash and Recycled Water Capacity Project was included in the FY 2020-21 Capital Improvement Plan with a total project budget of \$619,000. Sufficient funds are available in the Water Operating Fund (520) and the Water Capital Fund (521) for this agreement.

### **ENVIRONMENTAL REVIEW**

An initial review of the project indicates that the project likely qualifies for a “replacement or reconstruction” exemption under California Environmental Quality Act (CEQA) Section 15302. HDR Engineering Inc. and their environmental consultant will review all technical reports, develop the project description, and prepare the Notice of Exemption Form (NOE) from Appendix E of the CEQA Guidelines. If any findings require additional CEQA work or analysis beyond the work required for the NOE, this will be brought back to the City Council for consideration and approval.

### **ATTACHMENT**

Resolution No. 10582 - A Resolution Authorizing the City Manager to Execute an Agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project

Submitted,

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Marcus Yasutake, Director  
ENVIRONMENTAL AND WATER RESOURCES DEPARTMENT



**RESOLUTION NO. 10582**

**A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AN AGREEMENT WITH HDR ENGINEERING INC. FOR DESIGN SERVICES FOR THE WATER TREATMENT PLANT BACKWASH AND RECYCLED WATER CAPACITY PROJECT**

**WHEREAS**, the City identifies that the project is critical to ensuring the treatment of high quality water supply to be delivered to all residents; and

**WHEREAS**, the City of Folsom has identified this project as a priority to maintain the integrity and operation of the water treatment system; and

**WHEREAS**, HDR Engineering Inc. by reason of their past experience and abilities for performing these types of services, are qualified to perform the required design services for this project; and

**WHEREAS**, sufficient funds have been budgeted and are available in the Water Operating Fund (520) and Water Capital Fund (521); and

**WHEREAS**, the agreement will be in a form acceptable to the City Attorney:

**NOW, THEREFORE, BE IT RESOLVED** that the City Council of the City of Folsom authorizes the City Manager to execute an agreement with HDR Engineering Inc. for Design Services for the Water Treatment Plant Backwash and Recycled Water Capacity Project for a not-to-exceed amount of \$116,526.

**PASSED AND ADOPTED** this 26<sup>th</sup> day of January 2021, by the following roll-call vote:

- AYES:** Councilmember(s):
- NOES:** Councilmember(s):
- ABSENT:** Councilmember(s):
- ABSTAIN:** Councilmember(s):

\_\_\_\_\_  
Michael D. Kozlowski, MAYOR

ATTEST:

\_\_\_\_\_  
Christa Freemantle, CITY CLERK



CITY OF  
**FOLSOM**  
CREATED BY NATURE

# Folsom City Council Staff Report



|                        |  |
|------------------------|--|
| <b>MEETING DATE:</b>   | 1/26/2021  |
| <b>AGENDA SECTION:</b> | Old Business   |
| <b>SUBJECT:</b>        | Presentation Regarding the Impacts of Organics Recycling Mandated by SB1383 and Direction to Staff |
| <b>FROM:</b>           | Public Works Department  |

### BACKGROUND / ISSUE

The Public Works Department will make a presentation about the impacts of SB 1383 and request direction to staff. The presentation includes updates since it was originally presented to Folsom City Council on November 11, 2019.

Submitted,

\_\_\_\_\_  
Dave Nugen, Public Works Director

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# Update on Impacts of State Residential Organics Recycling Mandate SB1383

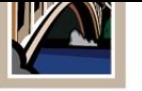
January 26, 2021



CITY OF  
**FOLSOM**

# Presentation Overview

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**



- Background of SB1383
- Requirements and Timeline for Implementation



- Organics Capacity Procurement
- Strategic Plan



- Impacts to Jurisdictions

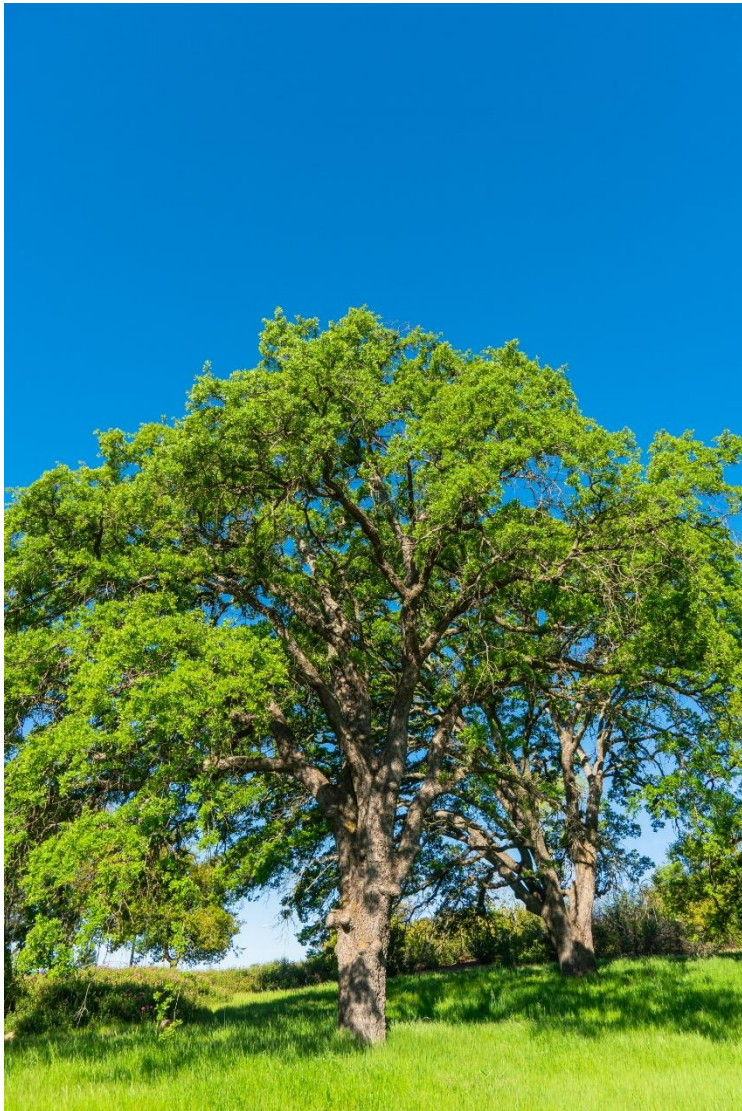


# This is a Climate Protection Law

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**



- In 2016, Governor Brown signed SB 1383 to reduce emissions of short-lived climate pollutants (methane).
- Regulations were finalized November 3, 2020 and take effect on January 1, 2022.

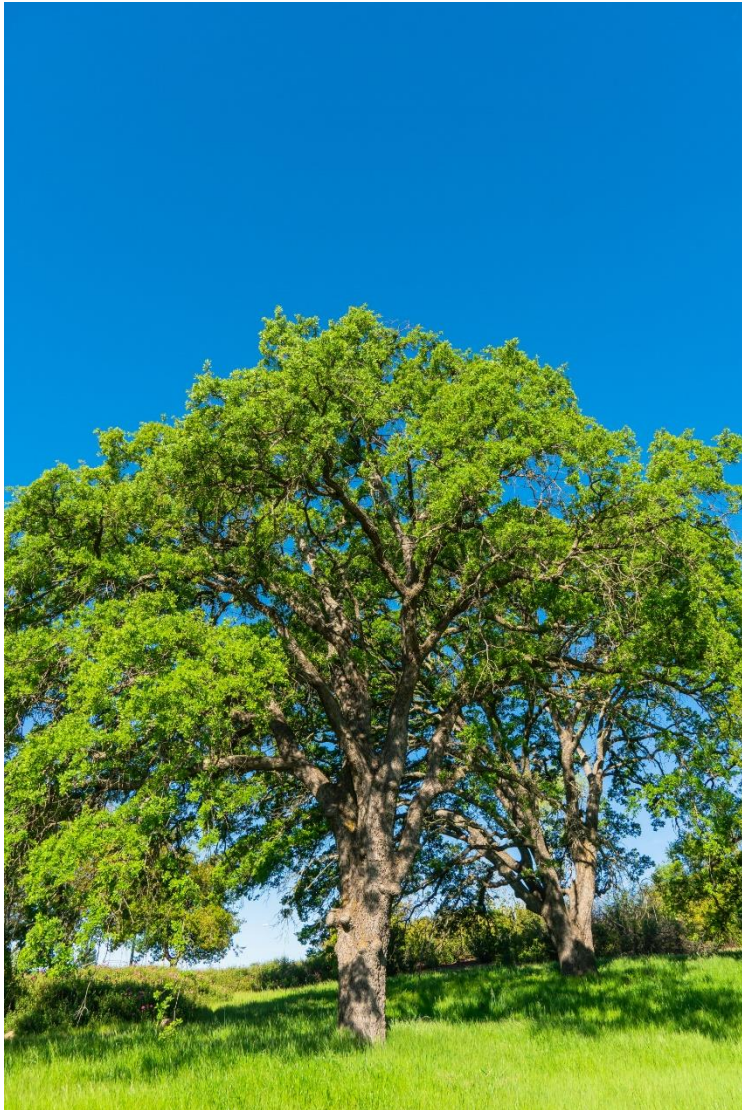


# SB 1383 Goals

01/26/2021 Item No.7.



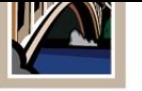
CITY OF  
**FOLSOM**



- Reduce organic waste disposal 75% by 2025.
- Rescue at least 20% of currently disposed surplus food for people to eat by 2025.

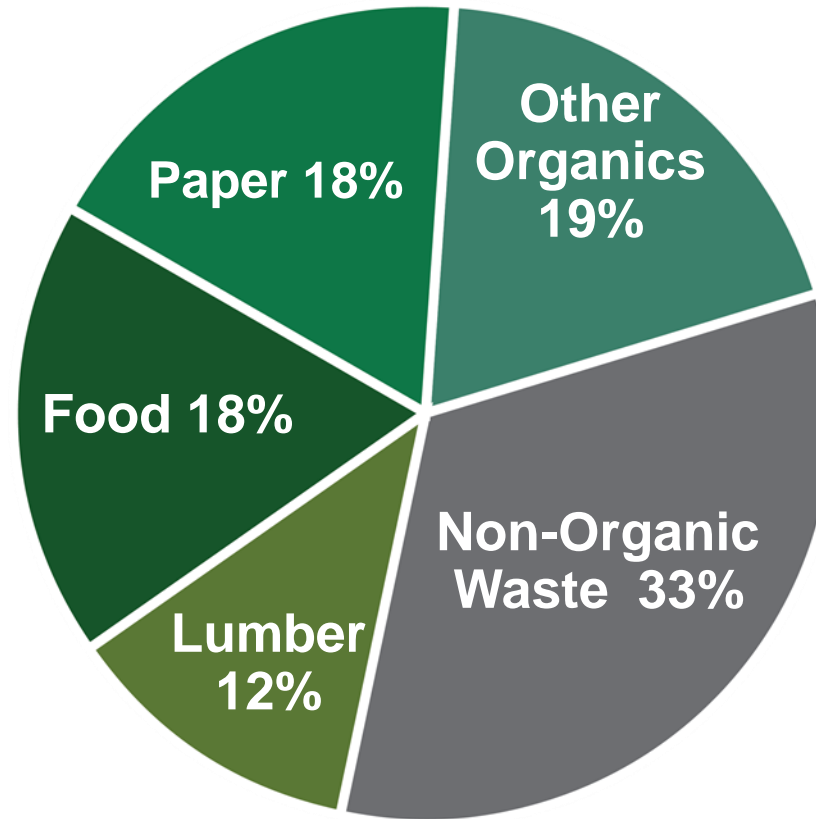
# Organic Waste Is the Largest Waste Stream in California

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**

CALIFORNIA  
DISPOSED OF  
APPROXIMATELY  
**27 MILLION TONS**  
OF ORGANIC  
WASTE IN 2017



**California's Waste Stream**

**IN CALIFORNIA, MILLIONS ARE**

## **FOOD INSECURE**

**1 IN 8 CALIFORNIANS**

**1 IN 5 CHILDREN**



CALIFORNIA THROWS AWAY  
**MORE THAN 6 MILLION TONS**  
OF FOOD WASTE EVERY YEAR!

# CLIMATE CHANGE NEGATIVELY IMPACTS CALIFORNIA

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**

- Landfilled Organic Waste Emits **Methane Gas—**  
**A Super Pollutant**  
More Powerful than CO<sub>2</sub>

**Methane Gas Contributes to Climate Change in California**



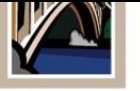
**CALIFORNIA**  
is already experiencing  
the impacts of  
**CLIMATE CHANGE**

IN 2015 THE DROUGHT COST THE AGRICULTURE INDUSTRY IN THE CENTRAL VALLEY AN ESTIMATED \$2.7 BILLION & 20,000 JOBS



# SB 1383 Jurisdiction Responsibilities

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**

**Provide Organics Collection  
Services to All Residents and  
Businesses**



**Conduct Education and  
Outreach to Community**



**Secure Access to Recycling and  
Edible Food Recovery Capacity**



**Establish Edible Food  
Recovery Program**



**Procure Recyclable and  
Recovered Organic  
Products**



**Monitor Compliance  
and Conduct  
Enforcement**



# Major City Staff Involvement



## SB 1383 IN ACTION

### INSPECTION AND ENFORCEMENT REQUIREMENTS



**Monitor Compliance and  
Conduct Enforcement**

## JURISDICTION REQUIREMENTS

### Ordinance 2022



Adopt an Ordinance  
(Enforceable  
Mechanism)  
Including  
Enforcement

### Compliance Monitoring & Education 2022-2024



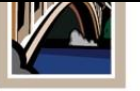
Annual Compliance  
Reviews, Route  
Reviews,  
Inspections  
  
Educate Violators

### Compliance Monitoring & Enforcement 2024



Annual Compliance  
Reviews  
Route Reviews,  
Inspections,  
Notice of Violations,  
Penalties for Violators

# Extensive Recordkeeping



## SB 1383 IN ACTION

JURISDICTION REQUIREMENTS



**Maintain Records and Report to CalRecycle**

### Recordkeeping Requirements:



Organic Collection Services



Hauler Program



Contamination Minimization



Waivers



Education & Outreach



Edible Food Recovery Program



Recycled Organic Waste Procurement



Recycled Paper Procurement



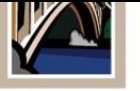
Commercial Edible Food Generators



Jurisdiction Inspection & Enforcement



# CalRecycle Will Enforce the Law



STATE  
ENFORCEMENT



## CALRECYCLE OVERSIGHT (BEGINS IN 2022)



### Authorize Waivers

- Low Population
- Rural Areas

### Emergency Circumstances

### Oversee and Monitor

- State Agencies and Facilities
- Local Education Agencies



### Oversee and Monitor for Compliance

### Jurisdiction Review

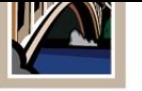
- Conduct joint inspections with jurisdictions
- Review Implementation Record



### If Violations

- Issue Notices of Violation
- May Authorize Corrective Action Plan
- Allows up to 24 months to address barriers outside of a jurisdiction's control

# Planning



- SB 1383 is an unfunded mandate.



- Current rates include funding for one administrative employee and drivers.



- Other program costs are not included in the scheduled rate increases.
- Additional rate increases will be unavoidable.

# Organics Recycling Capacity

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**

SB 1383 IN ACTION

INFRASTRUCTURE  
REQUIREMENTS



**Evaluating Current  
Infrastructure and Planning  
New Compost and AD Facilities  
and Edible Food Recovery**





# Selected Contractor

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**



- Compost produced at existing facilities in the short term
- Vendor will provide compost to meet requirements of SB1383
- Compost, gas and digestate produced at new anaerobic digestion facility in the long term

# Our Current System Remains

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**

SB 1383 IN ACTION

JURISDICTION  
REQUIREMENTS



**Provide organics collection  
service to all residents and  
businesses**

## Organic Waste Collection Services

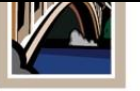


### RESIDENTIAL - Three-Container “source separated” Collection Service

- Organics are prohibited from gray container
- Blue Recycling Cart stays the same
- Food waste and food soiled paper is placed in bags before placement in Green Cart
- All organic waste (bagged food waste and food soiled paper, green waste) goes in Green Cart for collection and recycling

- Minimum contamination monitoring and reduction requirements
- Collection waivers authorized for certain documented circumstances

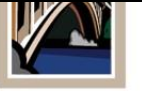
# Interim Organics Management



|  | <b>PRIOR</b>   | <b>CURRENT</b>  | <b>SB 1383</b>   |
|--|--|---|--|
|  | Delivered to Kiefer Landfill and used as Alternative Daily Cover (ADC) | Delivered to Elder Creek Transfer Station and land applied at Silva Ranch | Delivered to Elder Creek Transfer Station destined for compost |
|  | No Diversion Credit Effective Jan. 2020 - AB 1594                      | Diversion Credit Received Started July 2020                               | Diversion Credit Received                                      |
|  | Green Waste Only<br>9,000 tons   | Green Waste Only<br>9,000 tons  | Green Waste and Food Waste<br>10,500 tons                      |
|  | \$30 per ton<br>Rate study projected \$34.06 per ton in FY 22          | \$50 per ton  | \$97 per ton   |
|  | Contract expired June 30, 2020   | Contract expires December 31, 2021  | Starts January 1, 2022   |



# Cost Impacts



- Processing of organics from curbside collection.
- Edible food capacity.
- Staffing for program development and ongoing management including education, record keeping, inspections and enforcement.



- Collection staff for additional routes.
- Curbside containers for 3,500+ homes that currently do not have green waste collection.



- Collection vehicles to support weekly service (approximately 1,500 additional miles per week).
- Start up promotional supplies including compostable bags and kitchen food waste bins.

# Potential Rate Impacts



## On-Going Organics Management Expenses Not Included in Current Rates

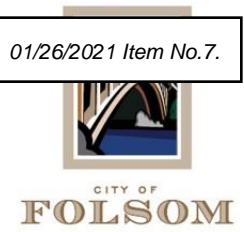
| Description                         | Current Interim Program | Annual SB 1383<br>(Based on FY 23 Estimate) |
|-------------------------------------|-------------------------|---|
| Tipping Fees                        | \$ 160,000              | \$ 674,000                                  |
| Additional Fuel Cost                | 2,000                   | 18,000                                      |
| Additional Maintenance (parts only) | 3,024.0                 | 23,000                                      |
| Truck Replacement                   | N/A                     | 208,000                                     |
| Container Replacement               | N/A                     | 18,000                                      |
| Procurement Requirements            | N/A                     | TBD   |
| Edible Food Waste Capacity          | N/A                     | TBD   |
| Education/Enforcement Materials     | N/A                     | 16,000                                      |
| Senior Environmental Specialist (1) | N/A                     | 264,000                                     |
| Environmental Technician (1)        | N/A                     | 129,000                                     |
| <b>Ongoing Program Costs</b>        | <b>\$ 165,224</b>       | <b>\$ 1,351,500</b>                         |
| Residential                         | \$ 165,224              | \$ 1,147,000                                |
| Commercial                          | \$ -                    | \$ 204,500                                  |

## Preliminary Ongoing Monthly Rate Impacts

|             |         |          |
|-------------|---------|----------|
| Residential | \$ 0.60 | \$ 4.15  |
| Commercial  | N/A     | \$ 29.03 |



# Potential Rate Impacts Cont.



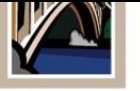
## One-time Implementation Costs

|                                   |           |                  |
|-----------------------------------|-----------|------------------|
| Residential Collection Trucks (4) | \$        | 1,500,000        |
| Curbside Containers               |           | 179,000          |
| Compostable Bags                  |           | 36,000           |
| Kitchen Containers                |           | 70,000           |
| Educational Materials/Postage     |           | 32,000           |
| Prop 218 Notice/Postage           |           | 21,000           |
| <b>One-Time Startup Total</b>     | <b>\$</b> | <b>1,838,000</b> |

|                    | Estimated One-Time Cost |                  | Total per Account |              |
|--------------------|-------------------------|------------------|-------------------|--------------|
| <b>Residential</b> | <b>\$</b>               | <b>1,836,683</b> | <b>\$</b>         | <b>79.72</b> |
| <b>Commercial</b>  | <b>\$</b>               | <b>1,317</b>     | <b>\$</b>         | <b>2.24</b>  |



# Next Steps



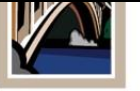
- **Staffing**

- We are requesting the addition of two (2) Environmental Specialist positions to be added to the existing FY 21 Budget
- This staffing is necessary to meet the existing mandates in the Recycling Division to avoid regulatory fines from CalRecycle and will assist with the future policy and program requirements for SB 1383 regulations
- With your concurrence we will return to with the appropriate Resolution to authorize the additional staff

- **Proceed with Rate Study**

# Questions?

01/26/2021 Item No.7.



CITY OF  
**FOLSOM**



City of Folsom  
Department of Public Works  
Solid Waste Division  
Division of Recycling  
(916) 461-6730  
solidwaste @ folsom.ca.us



CITY OF  
**FOLSOM**  
DISTINCTIVE BY NATURE

## Folsom City Council Staff Report



|                        |  |
|------------------------|--|
| <b>MEETING DATE:</b>   | 1/26/2021  |
| <b>AGENDA SECTION:</b> | New Business   |
| <b>SUBJECT:</b>        | <p>Affordable Housing Fund Requests and Direction to Staff</p> <ul style="list-style-type: none"> <li>a. Resolution No. 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City’s Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds</li> <li>b. Resolution No. 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City’s Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement And Related Documents and Authorizing the City’s Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds</li> </ul> |
| <b>FROM:</b>           | Community Development Department   |

**RECOMMENDATION / CITY COUNCIL ACTION**

Staff respectfully seeks Council direction on affordable housing loan funding requests for the proposed Sage at Folsom Multifamily Affordable Housing Development Project and the proposed Mangini Place Affordable Housing Project.



With respect to the Sage at Folsom Project, staff respectfully recommends that the City Council adopt the following resolutions:

- a. Resolution No. 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City’s Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds
- b. Resolution 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City’s Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement And Related Documents and Authorizing the City’s Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds

Please note that only one of the above referenced resolutions will ultimately be implemented, depending on whether or not the Sage at Folsom project is successful in securing highly competitive State tax credits.

**BACKGROUND / ISSUE**

The City of Folsom has a strong commitment to providing a variety of housing strategies and programs to address the City’s need for affordable housing. Since 2002, the City has committed financial assistance for the development of 750 multifamily affordable rental units. All of these units have long-term 55-year affordability requirements. As such, none of the affordable units in Folsom are at risk of conversion to market-rate uses within the next 25 years. Attachment 3 lists the developed and approved affordable rental projects in the City.

The City’s Housing Element, which implements the City's "fair share" of the regional affordable housing needs allocated (RHNA) to the City by the Sacramento Area Council of Governments (SACOG), is broken down into four income categories: very low-, low-, moderate- and above moderate-income (see Table 1 below for a breakdown of how these categories are defined in terms of median income and maximum affordable rent.

| <b>Table 1 - HUD Income Limits and Corresponding Maximum Affordable Rental Cost</b> |                                      |  |   |
|---|--------------------------------------|--|---|
| <b>State Defined Income Categories</b>  | <b>County Median Income Category</b> | <b>4-Person Household Maximum State and Federal Income Limits Sac County, 2020</b> | <b>Maximum Affordable Gross Rental Cost/Month</b> |
| Moderate Income   | 81%-120%                             | \$103,550  | \$3,020   |
| Median Income   | 100%                                 | \$86,300   | \$2,158   |
| Low Income  | 51% -80% of median                   | 69,050   | \$1,726   |
| Very Low Income   | 31% - 50% of median                  | \$43,150   | \$1,079   |
| Extremely Low Income  | < 30% of median                      | \$26,200   | \$655   |

The City's current Housing Element called for 1,218 very low-income units and 854 low-income units over the eight-year period from 2013 to 2021. During this past Housing Element cycle, the City provided an affordable housing grant in the amount of \$780,000 to the Talavera Ridge Apartments for six extremely low-income units and three affordable housing loans totaling over \$14 million for the Bidwell Pointe Mixed-use Project, Bidwell Place Apartments and Parkway Apartments (see loan summary and funding breakdown in Table 2 below).

| Development        | Sponsor                  | Affordable Units | City Loan           | Subsidy/Unit |
|--------------------|--------------------------|------------------|---------------------|--------------|
| Bidwell Pointe     | St. Anton                | 100              | \$5,300,000         | \$53,000     |
| Parkway Apartments | Pacific West Communities | 71               | \$4,680,000         | \$65,915     |
| Bidwell Place      | St. Anton                | 74               | \$4,150,000         | \$56,801     |
| <b>Totals</b>      |                          | <b>246</b>       | <b>\$14,130,000</b> |              |

### City Housing Funds

With regards to City funds, there are currently four types of City funding sources for affordable housing loans. As of December 31, 2020, the City's unencumbered housing fund balance is \$7.437 million in funds available to assist future affordable housing projects as shown in Table 3 below. It is important to note, of the four funds, only the Folsom Housing Fund (Fund 238) and the Housing Trust Fund (Fund 221) are expected to generate future City housing funds. During the last 18-month period, the City collected over \$3.5 million in inclusionary in-lieu fees as a result of the thriving new single-family housing development (primarily in the Folsom Plan Area) and approximately \$180,000 in housing trust fund fees associated with new commercial development. In addition to providing affordable housing loans, these funds are used for other housing related activities such as the Housing Element Update and housing financing consulting services.

| Housing Fund Name                 | Source                          | Fund Balance        |
|-----------------------------------|---------------------------------|---------------------|
| Housing Trust Fund (Fund 221)     | Commercial Fees                 | \$1,145,724         |
| Folsom Housing Fund (Fund 238)    | Inclusionary In-lieu Fees       | \$6,129,778         |
| Oaks at Willow Springs (Fund 274) | Willow Springs Inclusionary Fee | \$23,730            |
| Bonds Fund                        | Former Redevelopment Bonds      | \$138,370           |
| <b>Total</b>                      |                                 | <b>\$7,437,602*</b> |

\*In addition to providing affordable housing financial subsidies, Total includes funds utilized for consulting services, special reports and other housing related activities.

Earlier this year, the City received a funding request of up to \$4.5 million from USA Properties Fund, Inc. (USA) for a proposed 110-unit 100% affordable senior project called Sage of Folsom, to be developed on a 4.6-acre multi-family site at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area.

FIGURE 1: SAGE PROJECT SITE- AERIAL PHOTOGRAPH



In November 2020, the City received a second proposal from St. Anton Communities, LLC (St. Anton) seeking up to \$8.25 million in City-funding for a proposed 150-unit 100% affordable project to be known as the Mangini Place Project, which proposes to be developed on a 5.02-acre mixed-use designated site in the Folsom Plan Area on the northwest corner of Mangini Parkway and Savannah Parkway.

In mid-January of 2021, following the passage of the second COVID-19 relief package which significantly changed affordable housing underwriting, St. Anton revised their project and reduced the amount of the requested subsidy (See Analysis section). Under the revised project, St. Anton is now seeking \$6.86 million, representing a \$1.39 million reduction in requested City-funding for a proposed 152-unit 100% affordable project.

FIGURE 2: MANGINI PLACE PROJECT SITE





Historically, the City has received affordable housing fund requests sequentially and has analyzed and brought those individual requests forward for City Council consideration. In each circumstance, the available funds exceeded the individual requests. Currently, the City has two requests for affordable housing funds, which collectively exceed the current fund approximate balance of \$7.437 million. As such, staff is providing information, analysis, and preliminary recommendation to the City Council regarding the two affordable housing fund requests for consideration and direction. See analysis section for project descriptions, requests, financial analysis, considerations, and preliminary recommendation.

### **POLICY / RULE**

Financial support of affordable housing projects is consistent with the City's Housing Element Goal of facilitating affordable housing.

### **ANALYSIS / COUNCIL DIRECTION**

As mentioned in the background section of this report, the City currently has two affordable housing projects requesting affordable housing funds which exceed our current fund balance. Staff is presenting project information, financial analysis, and other considerations with preliminary recommendations and seeking direction from the City Council.

In order to preliminarily evaluate the two affordable housing funding requests (Sage at Folsom and Mangini Place - "Projects"), the City engaged the services of TDA Consulting, Inc. (TDA), a national provider of affordable housing consulting services, to provide technical assistance related to determining whether or not the Projects' proforma projections and City loan requests were reasonable. TDA conducted a preliminary review of each of the Projects' financial proformas. The Projects' assumptions, methodologies, and calculations were reviewed and evaluated for reasonableness and accuracy. For both proposed Projects, TDA concluded that the amount of the City loan request appeared to be appropriate and viable. TDA presented its analysis in project review memos, which are attached to this staff report as Attachment 5 and Attachment 6.

Subsequent to TDA's analysis of the two Projects on December 28, 2020, Congress passed a COVID-19 relief package that included a permanent 4% floor for of Low-Income Housing Tax Credits (LIHTC) projects' tax credit rate. This is a significant change to affordable housing underwriting and will serve to increase the amount of equity that a given affordable housing development project can generate from the syndication of Low-Income Housing Tax Credits. As indicated in the background section of this report, in response to this new development, St. Anton has revised their project and reduced the City subsidy request. At the time of this staff report, the updated project pro forma has been provided to TDA, but their review has not been completed. Given the reduction of the affordable housing funding request, it is anticipated that the TDA review would be equally if not more favorable than the original analysis.

Based on initial TDA analysis of the pro formas, staff consideration of the proposed projects, and the revised Mangini Place funding request, staff is recommending support for the funding of both projects as funding is available. Given that USA has entitlements and is further along

in the process, staff is recommending that the City Council review and approve the funding request of that project first, and direct staff to come back with a funding plan for St. Anton's to address the current funding deficit.

### **Affordable Housing Loan Requests**

#### **1. Sage at Folsom Apartments (USA Properties Fund, Inc. –“USA”)**

Sage at Folsom Apartments (a.k.a. Scholar Senior Apartments) received Planning Commission Planned Development approval on November 18, 2020. The project is a new construction, 100% affordable multifamily rental development and is proposed on the 4.6-acre site located at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area. The Sage project will consist of 110 one-bedroom units affordable to low-, very-low-, and extremely-low-income senior households. The original entitlement application for Sage included 86 units. In response to the City staff's request, USA added 24 units for a total of 110 units and increased the number of units designated for extremely low-income units. Although the original funding request was for \$5.6 million, following conversations with staff regarding limited availability of the City's housing funds, USA restructured the project in order to reduce the requested funding needed.

There are two potential project funding strategies pursued by USA: Scenario A, which anticipates receipt of federal HOME funds from the Sacramento Housing Redevelopment Agency (SHRA) and Scenario B, which anticipates a competitive application for State of California tax credits. Scenario A includes \$800,000 in SHRA HOME funds and \$4.5 million in City affordable housing funds. Scenario B, on the other hand, anticipates an award of competitive State of California tax credits generating equity of approximately \$1.8 million and \$3.5 million in City affordable housing funds.

Approving the two attached resolutions provides USA with two separate alternatives to secure funding for the Sage at Folsom project. Since the application for State of California tax credits is highly competitive, staff supports this approach because it provides the project with a “contingency” funding source in the event that the project is unable to secure the State tax credits.

#### **Key Project Details:**

The following are key project details associated with the Sage at Folsom funding request:

- The project received Planning Commission approval (Planned Development Permit) on November 18, 2020.
- USA owns the 4.2-acre project site and plans to begin construction in 2021.
- The City currently has a total of 926 (604 family and 322 senior) developed and approved affordable rental units (see Attachment 3). The City has not provided funding for a low-income senior project since 2007 and this project will provide 109 additional affordable senior apartments, increasing the total senior affordable units in the City to 431 units.

- USA, with staff’s support, applied to SHRA for \$800,000 in HOME funds. The total \$800,000 amount includes a forward commitment of the City’s HOME funding allocation through 2025. SHRA intends to take this request to the SHRA Board on February 3, 2021 and the County Board of Supervisors on February 23, 2021.
- USA plans to submit tax credit application to the State by the February 4, 2021 application deadline. Based on the project’s location it should score favorably in terms of proximity to amenities such as medical services, retail, grocery store, pharmacy, parks, and transit. However, in order to be viable, public subsidy is still required for the project to receive a competitive score.

**2. Mangini Place (St. Anton Communities, LLC – “St. Anton”)**

Mangini Place (a.k.a Folsom Ranch) is a proposed 152-unit, 100% affordable multifamily rental development to be located in the Folsom Plan Area located at the northwest corner of Mangini Parkway and Savannah Parkway. The recently submitted project requires design review approval from the Planning Commission, which is tentatively scheduled for this Spring. The Mangini Place project (as recently updated) will consist of 152 one-, two- and three-bedroom units affordable to low-, very-low-, and extremely-low-income households. All units will be family units with no age restrictions. St. Anton’s financing plan for this project proposes an overall permanent capital mix which includes a tax-exempt bond first mortgage, equity generated from the sale of federal 4% tax credits million and a City affordable housing loan \$6.86 million.

As previously indicated, in response to recent LIHTC changes, St. Anton restructured the proposed Mangini Place project. Under the updated proposal, the project provides two additional units and adjusts the affordability mix. In addition, the updated project has a reduced City subsidy funding request. Table 4 below summarizes these changes.

| <b>Table 4 – Mangini Place Project Comparison Summary</b> |   |  |
|---|---|--|
| <b>Design Development</b>                                 | <b>Original</b>                                   | <b>Updated/Revised</b>   |
| Unit #  | 150   | 152  |
| Unit Mix  | 85 1BR, 51 2BR, 14 3BR                            | 92 1BR, 48 2BR, 12 3BR   |
| Affordability Mix   | 45 @ 50% AMI<br>103 @ 60% AMI<br>2 Employee Units | 15 @ 30% AMI<br>16 @ 50% AMI<br>68 @ 60% AMI<br>51 @ 70% AMI<br>2 Employee Units |
| Funding Request   | \$8,250,000<br>\$55,743/restricted unit           | \$6,860,000<br>\$45,733/restricted unit  |



Key Project Details:

The following are key project details associated with the Mangini Place Apartments funding request:

- The proposed project is tentatively scheduled to be reviewed by the Planning Commission for Design Review in Spring of 2021.
- The City currently has a total of 926 (604 family and 322 senior) developed and approved affordable rental units (see Attachment 3). This project (as recently updated) will provide 154 additional affordable apartments which will be counted towards the City's RHNA during the next 2021 Housing Element planning period.
- The project provides affordable housing units in the Folsom Plan Area which supports General Plan Policy H 3.1 - The City shall encourage residential projects affordable to a mix of household incomes and disperse affordable housing projects throughout the City to achieve a balance of housing in all neighborhoods and communities.
- The project has a pedestrian focus, within walking proximity to Mangini Ranch Elementary school, and proximate to a variety of grocery stores, retail shopping and restaurants.

**Funding Analysis**

As of December 31, 2020, the City's unencumbered housing fund total is \$7.437 million in funds currently available to assist future affordable housing projects. As such, the City currently does not have sufficient housing funds available to fund both projects. However, the City's housing fund balance is growing relatively rapidly given the pace inclusionary housing in-lieu fees are being collected for new market rate for-sale housing development, primarily in the Folsom Plan Area. In the fourth quarter of 2020, the City issued 182 building permits for new single-family homes in the Folsom Plan Area with more home builders coming on-line. For 2021, staff is estimating at least 50 building permits per month with an average inclusionary in-lieu fee of \$6,000 per new single-family home. At that rate, the City will grow our Housing Fund by approximately \$900,000 per quarter for an estimated total of \$3.6 million in 2021. Given the total affordable housing fund ask of \$11.36 million for these two projects, the current fund balance of \$7.437 million, and the projected rate of fund growth, both projects could potentially be funded over the next 12 to 18 months.

Based on these assumptions, staff is recommending that the City Council approve both funding Scenarios (State tax credits and HOME funds), presented in Resolution No. 10583 and Resolution No. 10584 (but only one of the two Scenarios will be implemented) for the USA project now, and direct staff to bring St. Anton's Mangini Place funding request back to City Council in the future with a specific funding plan as additional housing funds become available, including potential advance in-lieu fee payments from one or more builders in the Folsom Plan Area.

## **FINANCIAL IMPACT**

The City has sufficient housing funds from the City's Housing Fund (Fund 238) available to commit to the Sage at Folsom Project under Scenario A (HOME) or Scenario B (State tax credit). This funding source does not impact the City's General Fund.

As outlined in TDA's Scholar Senior Apartment- Preliminary Project Review Memo (Attachment 5), from the City's perspective, the notable difference between funding scenarios A and B, is the reduction of \$1 million in City gap financing. On that grounds alone, Scenario B would obviously be better. The issue, however, is that Scenario B has more execution risk in that it relies on the project successfully competing within an upcoming funding round for a 4% state tax credit award.

An appropriation of \$3.5 million will be required if the project is able to secure the preferred State tax credit funding (Scenario B); otherwise, an appropriation of \$4.5 million will be required as part of the HOME funding request (Scenario A). The above-identified funding will only be provided upon proof, satisfactory to the City, that the Developer has financing commitments from all other sources of project financing necessary to fund the Project including, but not limited to, an award from the Tax Credit Allocation Committee.

Future funding commitments for the proposed Mangini Place project will most likely become available from the City's Housing Fund (Fund 238) and thus not impact the City's General Fund.

## **ENVIRONMENTAL REVIEW**

An Initial Study, Mitigated Negative Declaration, and Mitigation Monitoring and Reporting Program for the Sage at Folsom project was prepared in accordance with the California Environmental Quality Act (CEQA). With mitigations, the Sage at Folsom project will not have a significant effect on the environment. A Mitigated Negative Declaration was prepared and adopted by the City, and mitigation measures have been included in the project's Conditions of Approval. Environmental review will be conducted for the Mangini Place Affordable Housing Project in accordance with CEQA when the project is presented to the Planning Commission for review and consideration.

## **ATTACHMENTS**

1. Resolution 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds
2. Resolution 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement

And Related Documents and Authorizing the City's Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds

3. Affordable Multifamily Housing Developments
4. Folsom's Housing Funding "Toolbox"
5. Scholar Senior Apartments (Sage at Folsom) - Preliminary Project Review by TDA
6. Folsom Ranch (Mangini Place) - Preliminary Project Review by TDA
7. Term Sheet for \$3,500,000 loan request
8. Term Sheet for \$4,500,000 loan request (HOME funds)
9. PowerPoint Presentation – Affordable Housing Fund Request and Direction to Staff

Submitted,



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Pam Johns, Community Development Director

## Attachment 1

Resolution 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds



**RESOLUTION NO. 10583**

**A RESOLUTION OF THE CITY OF FOLSOM APPROVING AN AFFORDABLE HOUSING LOAN IN THE AMOUNT OF \$3,500,000 FROM THE CITY'S HOUSING FUND TO USA PROPERTIES FUND, INC. AND AUTHORIZING THE CITY MANAGER TO EXECUTE A LOAN AGREEMENT AND RELATED DOCUMENTS FOR THE CONSTRUCTION OF 110 AFFORDABLE SENIOR HOUSING UNITS AT THE SAGE AT FOLSOM MULTIFAMILY AFFORDABLE HOUSING DEVELOPMENT PROJECT, AND APPROPRIATION OF FUNDS**

**WHEREAS**, the developer of the proposed Sage at Folsom project, located at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area, is in the process of securing the majority of funding necessary to build the 110-unit multifamily 100% affordable senior housing project in which units will be affordable to extremely low, very-low and low income households; and

**WHEREAS**, the developer has requested an affordable housing loan from the City of Folsom in the amount of \$3,500,000 in order to assist with project financing; and

**WHEREAS**, the City's commitment to provide the requested affordable housing loan to the project will help the project qualify and compete for additional financing from the California Debt Limit Allocation Committee and Tax Credit Allocation Committee programs; and

**WHEREAS**, providing financial assistance to affordable housing projects is consistent with the Goal H-3: Facilitating Affordable Housing in the City's Housing Element; and

**WHEREAS**, the request for an affordable housing loan of \$3,500,000 is appropriate given the project's costs and development expenses; and

**WHEREAS**, funding for the requested affordable housing loan is available from the City's Housing Fund (Fund 238); however, an appropriation will be required; and

**WHEREAS**, the terms of the affordable housing loan are outlined in the term sheet dated January 21, 2021; and

**WHEREAS**, the term of the affordable housing loan will be 35 years at three percent simple annual interest, to be repaid with a share of residual cash flow to be generated from the project with final repayment terms subject to approval by the Finance Director; and

**WHEREAS**, receipt of all loan repayments will be deposited into the City's Housing Fund (Fund 238) and will be used to provide future assistance for affordable housing.

**NOW, THEREFORE BE IT RESOLVED THAT** the City of Folsom does hereby approve an affordable housing loan, in the amount of \$3,500,000 to USA Properties Fund, Inc. or a related affiliate to construct the 110-unit affordable senior multifamily project known as Sage

at Folsom, located at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area, subject to the developer entering into an affordable housing loan agreement in a form acceptable to the City Attorney.

**BE IT FURTHER RESOLVED** that the City Manager is authorized to execute an affordable housing loan agreement, and other related documents, consistent with and in furtherance of this Resolution.

**BE IT FURTHER RESOLVED** that the Finance Director is directed to appropriate \$3,500,000 from the City’s Housing Fund (Fund 238) for purpose of providing the affordable housing loan for the construction of the Sage at Folsom project.

**BE IT FURTHER RESOLVED** that, notwithstanding any provision to the contrary, this Resolution shall be null and void and shall have no force or effect in the event the Sage at Folsom project fails to qualify for financing from the California Debt Limit Allocation Committee and Tax Credit Allocation Committee programs.

**PASSED AND ADOPTED** this 26<sup>th</sup> day of January 2021 by the following vote, to wit:

- AYES:** Councilmember(s):
- NOES:** Councilmember(s):
- ABSENT:** Councilmember(s):
- ABSTAIN:** Councilmember(s):

\_\_\_\_\_  
Michael D. Kozlowski, MAYOR

ATTEST:

\_\_\_\_\_  
Christa Freemantle, CITY CLERK

## Attachment 2

Resolution No. 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement And Related Documents and Authorizing the City's Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds

**RESOLUTION NO. 10584**

**A RESOLUTION OF THE CITY OF FOLSOM APPROVING AN AFFORDABLE HOUSING LOAN IN THE AMOUNT OF \$4,500,000 FROM THE CITY'S HOUSING FUND TO USA PROPERTIES FUND, INC. AND AUTHORIZING THE CITY MANAGER TO EXECUTE A LOAN AGREEMENT AND RELATED DOCUMENTS AND AUTHORIZING THE CITY'S ALLOCATION OF \$800,000 IN HOME FUNDS RECEIVED THROUGH PARTICIPATION IN THE SHRA HOME CONSORTIUM FOR THE CONSTRUCTION OF 110 AFFORDABLE SENIOR HOUSING UNITS AT THE SAGE AT FOLSOM MULTIFAMILY AFFORDABLE HOUSING DEVELOPMENT PROJECT, AND APPROPRIATION OF FUNDS**

**WHEREAS**, the developer of the proposed Sage at Folsom project has requested an affordable housing loan from the City of Folsom in the amount of \$3,500,000 (Resolution No. 10583), to assist the project qualify and compete for additional financing from the Tax Credit Allocation Committee program, and this Resolution is expressly subject to the event the project does not qualify or receive financing from the California Debt Limit Allocation Committee and Tax Credit Allocation Committee programs; and

**WHEREAS**, the developer of the proposed Sage at Folsom project, located at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area, is in the process of securing the majority of funding necessary to build the 110-unit multifamily 100% affordable senior housing project in which units will be affordable to extremely low, very-low and low income households; and

**WHEREAS**, the developer has requested an affordable housing loan from the City of Folsom in the amount of \$4,500,000 in order to assist with project financing, in the event the project fails to qualify or receive financing from the Tax Credit Allocation Committee program; and

**WHEREAS**, providing financial assistance to affordable housing projects is consistent with the Goal H-3: Facilitating Affordable Housing in the City's Housing Element; and

**WHEREAS**, the request for an affordable housing loan of \$4,500,000 is appropriate given the project's costs and development expenses; and

**WHEREAS**, the City's commitment to provide the requested affordable housing loan to the project will help the project qualify for additional financing from the HOME Investment Partnerships Program (HOME); and

**WHEREAS**, the City is allocated HOME funding annually or through a three-year cycle by the Sacramento Housing and Redevelopment Agency (SHRA) HOME Consortium for the purpose of supporting low-income housing creation; and



**WHEREAS**, the developer has submitted a HOME application to SHRA requesting a \$800,000 commitment of the City's HOME allocation to the project which includes a forward commitment of and will utilize the City's Home funds through 2025; and

**WHEREAS**, the Developer's request for an additional loan of \$800,000 in HOME funds is appropriate given project costs and development fees; and

**WHEREAS**, funding for the requested affordable housing loan is available from the City's Housing Fund (Fund 238); however, an appropriation will be required; and

**WHEREAS**, the terms of the affordable housing loan are outlined in the term sheet dated January 21, 2021; and

**WHEREAS**, the term of the affordable housing loan will be 35 years at three percent simple annual interest, to be repaid with a share of residual cash flow to be generated from the project with final repayment terms subject to approval by the Finance Director; and

**WHEREAS**, receipt of all loan repayments will be deposited into the City's Housing Fund (Fund 238) and will be used to provide future assistance for affordable housing.

**WHEREAS**, receipt of all loan repayments will be deposited into the City's Housing Fund (Fund 238) and will be used to provide future assistance for affordable housing.

**NOW, THEREFORE BE IT RESOLVED THAT**, in the event the 110-unit affordable senior multifamily project known as the Sage at Folsom fails to qualify or receive financing from the Tax Credit Allocation Committee program, an affordable housing loan in the amount of \$4,500,000 shall be provided to USA Properties Fund, Inc. or a related affiliate to construct the project located at the northeast corner of the intersection of East Bidwell Street and Scholar Way within the Broadstone Unit No. 3 Specific Plan Area, subject to the developer entering into an affordable housing loan agreement in a form acceptable to the City Attorney. The approval provided in this Resolution shall expire December 31, 2021.

**BE IT RESOLVED THAT** the City of Folsom does hereby authorize commitment of \$800,000 in HOME funds received through SHRA to USA Properties Fund, Inc to construct the Sage at Folsom project.

**BE IT FURTHER RESOLVED** that the City Manager is authorized to execute an affordable housing loan agreement, and other related documents, consistent with and in furtherance of this Resolution.

**BE IT FURTHER RESOLVED** that the Finance Director is directed to appropriate a total of \$4,500,000 from the City's Housing Fund (Fund 238) for purpose of providing the affordable housing loan for the construction of the Sage at Folsom project.

**BE IT FURTHER RESOLVED** that, notwithstanding any provision to the contrary, this

Resolution shall be null and void and shall have no force or effect in the event the Sage at Folsom project qualifies and receives financing from the Tax Credit Allocation Committee program.

**PASSED AND ADOPTED** this 26<sup>th</sup> day of January 2021 by the following vote, to wit:

**AYES:** Councilmember(s):

**NOES:** Councilmember(s):

**ABSENT:** Councilmember(s):

**ABSTAIN:** Councilmember(s):

\_\_\_\_\_  
Michael D. Kozlowski, MAYOR

ATTEST:

\_\_\_\_\_  
Christa Freemantle, CITY CLERK

# Attachment 3

## Affordable Multifamily Housing Developments

## Affordable Multifamily Housing Developments

| Name of Development              | Sponsor   | Funding Sources  | Year Built/<br>Rehabilitated            | Housing<br>Units         | Target Income Groups                              |
|----------------------------------|---|--|---|--------------------------|---|
| Folsom Gardens I*                | Mercy Housing                                       | Section 8  | 1970/1997                               | 48                       | Extremely low-income families                     |
| Folsom Gardens II*               | Mercy Housing                                       | Section 8  | 1970/1997                               | 47                       | Extremely low-income families                     |
| Mercy Village                    | Mercy Housing                                       | Tax credits, CHFA, CDBG and Redevelopment funds, County HOME funds | 1960/1999                               | 81                       | Very low-income families                          |
| Creek View Manor                 | Mercy Housing                                       | Tax credits, CHFA, CDBG, Redevelopment funds, County HOME funds    | 2007                                    | 138                      | Very low- and low-income seniors                  |
| Vintage Willow Creek             | USA Properties                                      | Tax credits, CHFA, CDBG and Redevelopment funds                    | 2003                                    | 184                      | Very low- and low-income seniors                  |
| Folsom Oaks Apartments           | TLCS and Mercy Housing                              | HUD Section 811, MHP, CHFA, County HOME funds, City funds          | 2011                                    | 18                       | Extremely low-income households                   |
| Forestwood at Folsom Apartments  | USA Properties                                      | Tax credits, County HOME funds, City funds                         | 2012                                    | 54                       | Very low- and low-income families                 |
| Granite City Apartments          | St. Anton Partners                                  | Tax credits, City funds  | 2013                                    | 80                       | Very low- and low-income families                 |
| Bidwell Pointe                   | St. Anton Partners                                  | Tax credits, City funds  | 2019                                    | 100                      | Very low- and low-income families                 |
| Talavera Ridge                   | USA Properties                                      | City grant funds   | 2020                                    | 6                        | Extremely low-income households                   |
| Parkway Apartments               | Pacific West  | Tax credits, City funds  | Under Construction                      | 71                       | Extremely low-, Very low- and low-income families |
| Bidwell Place                    | St. Anton Partners                                  | Tax credits, City funds  | Pending Construction                    | 75                       | Extremely low-, Very low- and low-income families |
| Bidwell Street Studios           | Hirani Family Foundation/Sac. Commercial Properties | State grant funds  | Pending Construction/<br>Rehabilitation | 24                       | Extremely low-income households                   |
| <b>Total<br/>(Family/Senior)</b> |   |  |   | <b>926<br/>(604/322)</b> |   |



# Attachment 4

## Folsom's Housing Funding "Toolbox"

## Folsom's Housing Funding "Toolbox"

Affordable housing projects typically include numerous and oftentimes complex financing mechanisms including tax credits, conventional debt, developer equity, state and federal funding sources and local government subsidies. The following is an overview of major funding tools that are (of have been) available to Folsom to assist in the production of affordable housing:

- *Redevelopment Bond Funds.* With the dissolution of redevelopment in 2012, the State eliminated this significant financial resource available to the City to assist in the production of affordable housing. However, in September 2015 the Governor signed into law Senate Bill 107, which authorized the City's successor agency to designate the use of and commit 100% of former redevelopment bond proceeds that were issued for affordable housing purposes prior to June 28, 2011. As a result, the City was able to secure \$9,602,537.28 in bonds which the City has committed to recently approved affordable housing projects.
- *Inclusionary Housing Ordinance.* The City of Folsom has implemented an inclusionary housing program that requires developers of all new for-sale residential projects greater than 10 units to include at least 10% of their units as affordable to lower-income households. Since its inception in 2002, the City's inclusionary program has undergone several revisions, including the 2013 revisions which reduced the inclusionary requirement from 15% to 10%, added an in-lieu fee alternative, and removed the inclusionary requirements pertaining to rental units in accordance with the 2009 Palmer/Sixth Street Properties, L.P. v. City of Los Angeles court decision. Since 2014, the City has collected over \$6,899,347 in inclusionary housing in-lieu fees, with the majority of these fees being attributed to development in the Folsom Plan Area over the last year and a half. It is also important to note that as part of the 2021-2029 Housing Element Update, a program to review the current inclusionary housing in-lieu fee is proposed.
- *Housing Trust Fund (HTF).* In 2002, the Folsom City Council established the housing trust fund as a source of revenue for the development of affordable housing. Currently, Folsom charges a \$1.73 per square foot affordable housing fee to all new commercial development. The fee is based on the relationship between employment and need for affordable housing. The HTF has primarily been used with other sources of funding to provide gap funding for affordable rental projects. With the current economic conditions, this fund has not increased much over the past years. As of December 2020, the Housing Trust Fund had an unrestricted cash balance of \$1,145,724.
- *Public Local Housing Allocation (PLHA).* Senate Bill 2 (SB 2, Atkins) was part of a 15-bill housing package aimed at addressing the state's housing shortage and high housing costs. Specifically, it establishes a permanent source of funding intended to increase the affordable housing stock in California. The revenue from SB 2 varies from year to year, as revenue is dependent on real estate transactions with fluctuating activity. The legislation directs the California Department of Housing and Community Development (HCD) to use 70 percent of the revenue collected, beginning in calendar year 2019, to provide financial assistance to local governments for eligible housing related projects and programs to assist in addressing the unmet housing needs of their local communities. As part of the Urban

County, the City of Folsom (which is not an entitlement city) is ineligible to receive PLHA funds directly from the state. The City, is however, eligible to receive a proportional share of the County's allocation. Annual distribution for Folsom is 4.95% of the County's allocation which is estimated to be \$161,538 a year for a total of \$807,692 over the next 5 year period.

- *Combinations of federal and state housing funding sources.* These funding sources include Community Development Block Grant (CDBG) and Home Investment Partnership Program (HOME) funds, each of which are available to the City as part of the City's Consortium Agreement with the Sacramento Housing and Redevelopment Agency (SHRA). The City currently receives \$165,000 of CDBG funding annually to support the Seniors Helping Seniors program and to fund participation in the Sacramento region's Renter's Helpline. In February of 2011, the City Council authorized HOME funds in the amount of \$625,000 for the Forestwood 55-unit affordable project. As of December 2020, the City's net allocation of HOME funds is over \$400,000, which increases annually by approximately \$81,000 a year through 2024. Other State funding sources, such as the Infill Infrastructure Grant Program and the recently awarded Bidwell Street Studios \$2.5 million Homekey Grant are available through the California Department of Housing and Community Development. These State funding sources are highly competitive, and especially challenging for high opportunity jurisdictions like Folsom. Furthermore, these State funding sources typically require prevailing wage which increases the development costs associated with the project.
- *Federal and state low-income housing tax credits.* Tax credits are available to for-profit and non-profit developers of affordable rental housing. The application for tax credits, especially for the more desirable nine percent tax credits, is extremely competitive; often multiple rounds of applications are required before funds are secured. Since 1999, tax credits have been awarded for the development of seven affordable housing projects in the City totaling more than 697 units in Folsom. Included in this total are the 72-unit Parkway Apartments (currently pending construction) and the 75-unit Bidwell Place Apartments (approved the City earlier this year). Both projects will produce extremely low-, very low- and low-income units using tax credits and city housing funds.

## Attachment 5

Scholar Senior Apartments (Sage at Folsom) - Preliminary Project Review by TDA



## SCHOLAR SENIOR APARTMENTS – PRELIMINARY PROJECT REVIEW

Date: November 18, 2020

To: Stephanie Traylor Henry, Senior Planner, City of Folsom

From: Peter Hughes, TDA Consulting  
Stephen Lathom, TDA Consulting



**BACKGROUND:** The City of Folsom (City) has engaged TDA Consulting, Inc. (TDA) to provide technical assistance related to the City’s administration of affordable housing funds. As part of TDA’s engagement with the City, we have reviewed information submitted by USA Properties Fund, Inc. (USA) in support of Scholar Senior Apartments (Scholar Senior), a proposed 110-unit multifamily affordable housing development, in an effort to develop an opinion on the reasonableness of USA’s request for City affordable housing funds. This preliminary project review seeks to determine whether or not the current project assumptions are commercially reasonable in the context of the general market for affordable multifamily rental housing supported by public gap funding.

This review encompasses two potential project execution strategies offered by USA – *Scenario A*, which anticipates receipt of federal HOME funds from the Sacramento Housing Redevelopment Agency (SHRA) and *Scenario B*, which anticipates a competitive application for State of California LIHTC.

The primary difference between *Scenario A* and *Scenario B* is in the financing structure. There are relatively minor differences in total project cost – due primarily to subtle variations in the calculation of the interest and fees associated with each execution strategy and the relatively minor (<1%) increase in costs associated with upgraded material requirements imposed by SHRA for HOME projects, but the nature, scope, and cost of the project are substantively identical otherwise. For this reason, our review does not place significant emphasis on a side-by-side comparison of each strategy (e.g., HOME funds vs. State LIHTC) but rather considers the impact each strategy might have on the City’s award of affordable housing gap funds.

As part of our review, TDA used the sources/uses and operating expense projections provided in USA’s project narrative packet to develop a “baseline” proforma using TDA’s in-house proforma format. Ensuring that bottom line figures (e.g. total operating and development costs, cash flow projections, etc.) were consistent between TDA’s proforma and USA’s preliminary financial projections helps to validate the integrity and structure of USA’s assumptions and gives us the ability to test the impact of alternative financial assumptions (e.g. changes in DCR or interest rates and terms). Further, we also evaluate the project’s ongoing viability by stress testing other factors (e.g. inflation or vacancy rates).

It is important to note that, at this early stage, our review cannot be classified as “underwriting” of USA’s proposal. Underwriting would require the availability of substantially more information than has currently been provided, but this is common since developers are unlikely to invest in predevelopment costs ranging from market studies to architectural plans/specifications to other professional reports until their project concept has received at least conditional support for the City’s requested investment. As a result, TDA’s review is appropriately preliminary in nature and primarily based on whether or not USA’s proforma projections and supporting project narrative, as submitted, and taken largely at face value, are internally consistent, structured within industry norms, and therefore likely to be achievable.

**PROJECT SUMMARY:** Scholar Senior is a proposed new construction, 100% affordable multifamily rental development. The project will be located at 89 Cavitt Drive in Folsom near the northeast corner of East Bidwell Street and Scholar Way. Its 110 one-bedroom/one-bathroom units range in size between 530-574 SF and will be restricted to seniors. USA proposes a mix of extremely low-, very low-, and low-income income/rent restrictions (i.e., 30%, 50%, and 80% AMI respectively). As noted below, while the gross rent potential is the same in both Scenario A and B, the relative mix of 30%/50%/80% units varies in achieving that bottom-line figure.

The project site is located in a well-developed area with a diverse mix of commercial, educational, and residential uses in close proximity to multiple amenities. Broadstone Marketplace – a grocery-anchored retail center that also includes a bank, credit union, drugstore, and multiple neighborhood retail and dining establishments – is located immediately south of the site and connected via a pedestrian walkway along East Bidwell Street. Public transportation is readily available as well, with the nearest bus stop adjacent to the north end of the Scholar Senior site. USA’s project narrative proposes updates and improvements to the bus stop as part of the project scope.

Scholar Senior will incorporate sustainable design principles consistent with the California Green Building Standards Code (CALGreen) and is intended to exceed 2016 California Building Energy Efficiency Standards by at least 15%. 12 parking spaces will be dedicated exclusively for electric vehicles and serviced by six (6) charging stations per CALGreen requirements. In addition, the rooftop will include a 199-kW photovoltaic system producing on-site renewable energy for community use. Water-efficient and drought tolerant landscape materials will be employed on-site to further reduce resource consumption and improve operating efficiency.

**FINANCIAL REVIEW:** While regulated affordable housing projects tend to use highly complex financing mechanisms – attempting to take advantage of multiple federal, state, and/or local programs intended to help provide housing at below-market rates so as to be affordable to low-income tenants – the financial evaluation can be distilled into five relatively simple questions:

1. Who does the project seek to serve, and what rents can, and will they pay given both regulatory requirements and market realities? (Revenue)
2. What will it cost to operate the project once built, including the need to set aside reserves for future capital repairs? (Operating Budget)
3. Will the project remain viable over time? (Long Term Proforma/Cash Flow)
4. What will it cost to develop the project? (Development Costs)
5. What sources are available? (Sources)

**REVENUE:** To meet SHRA’s low-income targeting requirements, USA has organized projections for rental income, based on income targeting, as depicted in the table below. Here Scenario A and Scenario B are slightly different in the specific mix of income targeting, but both achieve the same gross rent potential. Scenario A has more 30% AMI units but accomplishes that, in comparison, by increasing the number of 80% units.

| <u>% AMI Target</u> | <u># Units</u><br><u>Scenario A</u> | <u># Units</u><br><u>Scenario B</u> | <u>Net Rent</u> | <u>Utility Allowance</u> | <u>Gross Rent</u> |
|---------------------|-------------------------------------|-------------------------------------|-----------------|--------------------------|-------------------|
| 30%                 | 6                                   | 3                                   | \$454           | \$47                     | \$501             |
| 50%                 | 68                                  | 73                                  | \$787           | \$47                     | \$834             |
| 80%                 | 35                                  | 33                                  | \$1,288         | \$47                     | \$1,335           |
| Mkt/Mgr.            | 1                                   | 1                                   | \$1,292         | \$47                     | \$1,339           |

While initially based on HUD's 2020 HOME rent limits for the MSA, USA's proforma assumes that HOME (and LIHTC) rents will increase at 2.5%/year between now and the anticipated first year of stabilized occupancy in 2025. While not a universal approach to proforma modeling, this is not an unreasonable estimate given recent patterns in California. It does introduce some risk however since future income increases cannot be guaranteed, especially as the impact of the pandemic continues to reverberate across major portions of the economy. This said, given the acute demand for affordable housing in the State of California generally, and the City of Folsom specifically, USA's rent projections appear to be neither unrealistic nor unachievable given this early stage review.

USA's proforma does include a monthly utility allowance of \$47/unit, however the methodology used for calculating this monthly amount was not provided in USA's project narrative or proforma. While USA's updated project narrative outlines plans for on-site renewable energy production – a 199-kW rooftop photovoltaic system – the dollar-for-dollar impact on monthly utility costs remains unclear. Likewise, understanding whether this monthly utility allowance figure was benchmarked off of other properties in USA's portfolio or, perhaps, by using a third-party engineer to determine the estimate would be useful.

Our concern is the monthly utility allowance may still be somewhat understated. As a means of comparison, we used SHRA's utility allowance schedule to calculate a monthly utility allowance of \$82/unit assuming that all utility consumption would be sourced from electric power and that USA (i.e., the landlord) would pay for all water, sewer, and trash collection charges.

For reference, the impact of a higher utility allowance would be a decrease in contract rents and therefore in net revenue. In an \$82/month scenario, this would result in a reduction of more than \$45,000 in annual gross rent potential. While not a "deal killing" concern at this early stage of review, this is an important distinction that we recommend be further clarified by USA going forward.

Vacancy is projected at 5% annually which is standard in California markets. Likewise, non-rental income is projected at \$176/unit/year, within TDA's recommended underwriting maximum of \$240/unit/year. Receipt and review of a third-party rental housing market study – a requirement for SHRA HOME funds investment – should corroborate these baseline estimates.

**OPERATING COSTS:** Operating expense projections provided by USA are very clearly "early stage" numbers (i.e., limited chart of accounts, no current line-item expenses for repairs and maintenance, lump sum utility estimates, all budget numbers rounded to the nearest hundred, etc.). At \$4,808/unit/year, projections do meet the CTCAC required *minimum* of \$4,800/unit/year for non-elevator, multifamily buildings. However, USA's projections fall below three operating expense metrics outlined in a Novogradac study<sup>1</sup> for data compiled thru 2019: Large Metropolitan (\$5,531/unit), New Construction (\$5,351/unit), and Properties with 100< Units< 200 (\$5,052/unit). At the same time, we note that this comparison is based on a backward-looking review of operating costs (and in the case of the CTCAC figure this year's underwriting metric), USA has already built in higher-than-current rent assumptions. In a forward-looking approach, it would be fair to also inflate operating costs over the same period when estimating the first year of stabilized operations.

Ultimately, because USA will serve as property manager for Scholar Senior and with a local portfolio of 32 apartment communities appears well positioned to do so, our concern with the potentially low operating expense projection is somewhat more muted than it otherwise might be. This said, we

<sup>1</sup> 2020 Multifamily Rental Housing Operating Expense Report: Survey and Analysis of LIHTC Properties, Novogradac

recommended that the City request and review historical operating expense reports from comparable properties owned and operated by USA during future due diligence to confirm the validity of USA's operating expense projections for Scholar Senior.

**LONG TERM PROFORMA/CASH FLOW:** USA's project narrative included a 15-year cashflow projection which, as noted above, we extended to develop a 20-year cashflow projection for the project. As submitted, and accounting for the nominal increase in NOI resultant from the City's willingness to reduce its requirement for supportive service hours, debt service coverage is 1.25 in the first year of stabilized operations. This represents the upper limit of the industry standard range of 1.15 – 1.25. The proforma operating margin in this scenario is over 23%. As structured, these projections do not seem unreasonable and are likely achievable, especially given the historically low interest rate environment in which we currently find ourselves.

Assuming fully amortizing payments on senior debt after conversion and taking at face value USA's inflation factors of 2.5% for rental income and 3.5% for operating expenses, the 20-year cashflow projects roughly \$800K in "free" surplus cash after the repayment of the deferred developer fee (achieved in year 17). If accurate, this would retire only a nominal amount of the accrued interest on the City and SHRA loans (assuming each subsidy is structured to earn 3% simple interest and that collective payment of 50% of surplus cash following retirement of the deferred fee). Said another way, available surplus cash is insufficient to repay any outstanding principal on either subordinate loan in the first 20 years of projected operations. This is not unusual, but it is worth noting.

**DEVELOPMENT COSTS:** Total development costs (outlined in the table below) are ~\$31.67M or ~\$288K/unit. Though still only pre-development estimates, these projections are substantially aligned with similar new construction affordable housing projects also under consideration by the City.

| <b>Development Costs<sup>2</sup></b> | <b>Total</b>        | <b>Per Unit</b>  | <b>% of Total</b> | <b>Per Sq. Ft.</b> |
|--------------------------------------|---------------------|------------------|-------------------|--------------------|
| Acquisition                          | \$1,250,000         | \$11,364         | 3.9%              |                    |
| Site Work and Construction           | \$19,390,912        | \$176,281        | 61.2%             | <b>\$332.61</b>    |
| Soft Costs                           | \$4,783,293         | \$43,484         | 15.1%             |                    |
| Financing Costs                      | \$2,035,686         | \$18,506         | 6.4%              |                    |
| Reserves & Start Up                  | \$546,565           | \$4,969          | 1.7%              |                    |
| Developer Fee                        | \$3,661,166         | \$33,283         | 11.6%             |                    |
| <b>Total Development Costs</b>       | <b>\$31,667,622</b> | <b>\$287,887</b> | <b>100.0%</b>     | <b>\$543.18</b>    |

**FUNDING SOURCES:** As noted in the background section above, USA has proposed two different financial structures (shown below as Scenario A and B respectively). Both scenarios include a private first mortgage of ~\$12.2M, equity generated from the sale of federal LIHTC of ~\$10.2M (at a presumed rate of \$0.91), NOI during construction of ~\$1M, and a deferred developer fee of ~\$2.5-2.7M.

Scenario A includes \$800,000 in SHRA HOME funds and \$4.5M in City affordable housing funds. Scenario B, on the other hand, anticipates an award of competitive State of California tax credits generating equity of ~\$1.8M (at a presumed rate of \$0.75) and \$3.5M in City affordable housing funds.

<sup>2</sup> For purposes of comparison we utilized the nominally higher cost (~\$250K) to develop Scholar Senior based on the updated project narrative and financial information provided by USA in early October 2020. This accounts for the increase in material cost to build the project to meet SHRA's design standards for projects receiving an award of HOME funds.



From the City’s perspective, the notable difference between scenarios A and B, is the reduction of \$1M in City gap financing. On that grounds alone, Scenario B would obviously be better. The issue, however, is that Scenario B has more execution risk in that it relies on the project successfully competing within an upcoming funding round for a 4% state LIHTC award. If the project is not successful, then it may not happen at all. The question to be considered is whether this \$1M “savings” the City might realize is worth the risk of the project not happening. Among the factors in that consideration are the presence of other pipeline projects being considered and the total funding currently available. If agreeing to the competitive application allows the City to commit to two projects, for example, the risk inherent in the competition may be offset by the chance for additional projects and their units in the local marketplace.

Alternatively, the City may elect to move forward under Scenario A utilizing an allocation of HOME funds from SHRA. While the upfront cost to the City would be an additional \$1M in City funding (as a partial replacement of State of California tax credit equity), SHRA standards of design require recipients of HOME funds to implement the use of higher quality construction materials (e.g., solid wood cabinets, hard surface countertops, and more durable flooring) which would likely improve the long term physical viability of Scholar Senior. A higher quality project would likewise be an asset to the community for a longer period of time, justifying the larger initial investment of City funding.

Ultimately, there is no “right” answer from a technical standpoint in choosing between the two execution strategies. Both scenarios appear plausible subject to the award of either additional subsidy (SHRA HOME) or equity (State of California LIHTC), but the relative likelihood of accessing those sources seems to vary.

| Sources – Scenario A           | Total               | Per Unit         | % of Total    |
|--------------------------------|---------------------|------------------|---------------|
| Mortgage                       | \$12,275,000        | \$111,591        | 38.8%         |
| LIHTC Equity                   | \$10,298,097        | \$93,619         | 32.5%         |
| SHRA HOME Funds                | \$800,000           | \$7,273          | 2.5%          |
| <b>Folsom Loan</b>             | <b>\$4,500,000</b>  | <b>\$40,909</b>  | <b>14.2%</b>  |
| NOI During Construction        | \$1,094,899         | \$9,954          | 3.5%          |
| Deferred Developer Fee         | \$2,699,626         | \$24,196         | 8.5%          |
| <b>Total Development Costs</b> | <b>\$31,667,622</b> | <b>\$287,887</b> | <b>100.0%</b> |

| Sources – Scenario B           | Total               | Per Unit         | % of Total    |
|--------------------------------|---------------------|------------------|---------------|
| Mortgage                       | \$12,287,000        | \$111,700        | 39.0%         |
| LIHTC Equity                   | \$10,255,209        | \$93,229         | 32.6%         |
| CA State TC Equity             | \$1,836,680         | \$16,697         | 5.8%          |
| <b>Folsom Loan</b>             | <b>\$3,500,000</b>  | <b>\$31,818</b>  | <b>11.1%</b>  |
| NOI During Construction        | \$1,101,732         | \$10,016         | 3.5%          |
| Deferred Developer Fee         | \$2,497,427         | \$22,704         | 7.9%          |
| <b>Total Development Costs</b> | <b>\$31,408,787</b> | <b>\$285,534</b> | <b>100.0%</b> |

**PRELIMINARY CONCLUSIONS & ADDITIONAL QUESTIONS:** In addition to the items noted above, there are a couple additional questions raised by our initial review. Neither is necessarily a “showstopper,” but each will require attention in any future evaluation of the project if it moves forward and may impact the speed at which it can proceed.

First, at the writing of this memorandum, USA is scheduled to present its proposal for Scholar Senior to the City of Folsom Planning Commission on November 18, 2020 for approval of a Planned Development Permit. This approval is important from a timing perspective and, depending upon the development finance path USA decides to pursue, may be a requirement for submitting an application for HOME funds to SHRA or for tax credits to CTCAC. We recommend the City confirm USA's receipt of this approval prior to a preliminary commitment of AHF subsidy.

Second, the site was created via a parcel split with the adjacent LDS Church. USA's updated project description calls for a partial reconfiguration of the site entry (e.g. ingress/egress) along Cavitt Drive; relocating an existing entry gate among other "driveway improvements." As well, USA's update notes that a private access easement has been recorded on the Parcel Map. TDA reviewed the County of Sacramento Assessor's parcel map but was unable to confirm that this easement has been recorded. We recommend that the City confirm the recording of this easement prior to a preliminary commitment of AHF subsidy.

While still noting that our review of Scholar Senior is preliminary in nature, we believe the information presented with regard to the project narrative, experience and capacity of the development team, development costs, and operating projections provides evidence of a viable project that is generally structured within industry norms for regulated multifamily affordable housing. Following the City's decision about its preferred development financing path, and prior to the City making a preliminary commitment of affordable housing funds, we recommend seeking additional clarity on the items noted herein.

## Attachment 6

Folsom Ranch (Mangini Place) - Preliminary Project Review by TDA

**FOLSOM RANCH – PRELIMINARY PROJECT REVIEW**

Date: December 28, 2020  
To: Stephanie Traylor Henry, Senior Planner, City of Folsom  
From: Peter Hughes, TDA Consulting  
Stephen Lathom, TDA Consulting



**BACKGROUND:** The City of Folsom (City) has engaged TDA Consulting, Inc. (TDA) to provide technical assistance related to the City’s administration of affordable housing funds. As part of TDA’s engagement with the City, we have reviewed information submitted by St. Anton Communities (St. Anton) in support of Folsom Ranch, a proposed 150-unit multifamily affordable housing development, to develop an opinion on the reasonableness of St. Anton’s request for an investment of City affordable housing funds. This preliminary project review seeks to determine whether or not the current project assumptions are commercially reasonable in the context of the market for affordable multifamily rental housing supported by public subsidy.

As part of our review, TDA used St. Anton’s static (i.e. PDF, not MS excel) proforma and project narrative to develop a “baseline” excel proforma using TDA’s in-house format. Ensuring that bottom line figures (e.g. total operating and development costs, long-term cash flow projections, etc.) were consistent between TDA’s format and St. Anton’s preliminary financial projections helps to validate the integrity and structure of St. Anton’s assumptions and allows us to test the impact of alternative financial assumptions on the total project gap (e.g. changes in DCR or interest rates and terms). Further, it enables us to evaluate the project’s ongoing viability by stress testing other assumptions (e.g. inflation or vacancy rates).

We also note that at this early stage, TDA’s review cannot be classified as “underwriting” of St. Anton’s proposal. Underwriting would require the availability of substantially more information than St. Anton has currently provided, but this is not uncommon since developers are unlikely to invest in predevelopment costs ranging from market studies to architectural plans/specifications to other professional reports until their project concept has received at least conditional support for the City’s requested investment. As a result, TDA’s review is preliminary in nature and primarily based on whether or not St. Anton’s proforma and project narrative, as submitted and taken largely at face value, are internally consistent, structured within market norms and, therefore, likely to be achievable.

**PROJECT SUMMARY:** Folsom Ranch is a proposed 150-unit, 100% affordable multifamily rental development to be located in the Folsom Plan Area (i.e., Folsom Plan Area Specific Plan and/or Development South of 50) a 3,520-acre area bounded by Highway 50 (north), Prairie City Road (west), White Rock Road (south), and the El Dorado County line (east) in Folsom, California, 95630. Folsom Ranch would be comprised of 85 one-bedroom/one-bathroom units at 685 SF, 51 two-bedroom/two-bathroom units at 945 SF, and 14 three-bedroom/two-bathroom units at 1,135 SF. All units would be available to low-income (60% AMI) and very low-income (50% AMI) tenants under the following unit configuration: 26 one-bedroom, 15 two-bedroom, and four (4) three-bedroom units would be income and rent restricted at 50% AMI; 59 one-bedroom, 34 two-bedroom, and 10 three-bedroom units would be income and rent restricted at 60% AMI. All units would be family units with no age restrictions or preference given for special needs populations.



The specific project site is yet to be determined but would be located in the Folsom Plan Area south of California Hwy 50 so proximity to amenities is a relative matter at this early stage of the development process; ultimately, proximity to amenities will be dictated by the timing and density of commercial property development in the Folsom Plan Area. However, the Palladio Shopping Center – located north of Hwy 50 at Bidwell Street – contains a grocery store, bank, and out-patient medical facilities while other neighborhood retail, entertainment, and dining, as well as several big box retailers are located in the Folsom Gateway Shopping Mall roughly ¼ mile south of Palladio. Public transportation does not currently run south of Hwy 50 – the nearest Folsom Stage Line bus stop is located on Iron Point Road just west of Bidwell Street.

**FINANCIAL REVIEW:** Projects such as Folsom Ranch are highly complex – taking advantage of multiple state, federal, and local programs intended to help provide housing at below-market rates that are affordable to low-income tenants (as outlined above) – but the initial financial evaluation can be distilled into five relatively simple questions:

1. Who does the project seek to serve, and what rents can, and will they pay given both regulatory requirements and market realities? (Revenue)
2. What will it cost to operate the project once built, including the need to set aside reserves for future capital repairs? (Operating Budget)
3. Will the project remain viable over time? (Long Term Proforma/Cash Flow)
4. What will it cost to develop the project? (Development Costs)
5. What sources are available? (Sources)

**REVENUE:** St. Anton currently projects rents for all units at the gross 2020 regulatory limits for LIHTC projects (established by limiting rent to 30% of XX% AMI based on imputed occupancy of 1.5 persons per bedroom). Rental revenue is inflated at 2% per annum. These projections also include allowances for tenant-paid utilities of \$74/one-bedroom, \$95/two-bedroom, and \$115/three-bedroom unit calculated using the Sacramento Housing and Redevelopment Agency (SHRA) utility allowance schedule. St. Anton is also projecting \$777/unit/year in non-rental income including allowances for in-unit washer and dryer rentals as well as garage rentals for 40% of all units in addition to the more standard NSF, late fees, and miscellaneous/interest charges which are standard “other income” items.

This projection is well in excess of our typical underwriting practice of limiting such revenue to no more than \$250/unit/year. Given St. Anton’s track record developing and operating multifamily projects, we would expect they can provide operating histories from comparable projects supporting this level of fee-based amenity revenue. This said, we encourage the City to request additional supporting documentation to document requisite demand for these amenities – presumably as part of the third-party market analysis – prior to any formal commitment of City funds.

Vacancy is projected at 5% annually which, in addition to being the California Tax Credit Allocation Committee (CTCAC) minimum vacancy requirement for tax-exempt bond executions, is fairly standard in California markets. This is supported by both the generally tight regional market for affordable multifamily rental housing and, at least in the near term, the fact that St. Anton’s most recent development, Bidwell Pointe – located in central Folsom – is currently running at a 2% vacancy rate having received a certificate of occupancy less than 18 months ago. If Folsom Ranch overperforms (i.e., achieves stabilized vacancy of less than 5%) additional resources will be available for repayment of deferred developer fee and/or operating and replacement reserves, contributing to the long-term viability of the project.

**OPERATING COSTS:** The operating expense projections provided by St. Anton are clearly very “early stage” numbers (i.e., limited chart of accounts, repairs and maintenance budget provided as “lump sum” amount, all budget numbers rounded to the nearest hundred, etc.). Because St. Anton’s property manager is an affiliated entity – St. Anton Multifamily – which affords some operating efficiencies that are otherwise difficult to obtain when employing a third-party property management firm, these “best guess” estimates for operations are not uncommon. In addition, having an affiliated entity serve as property manager can also offer efficiencies. As an example, the property management fee for Folsom Ranch is projected at 3%, while the industry standard is normally closer to 5%.

Of note however, is that St. Anton’s operating expense projection of \$4,413/unit/year falls short of the CTCAC required *minimum* of \$4,600-4,800/unit/year, for multifamily buildings (the range is provided because it is not yet known whether Folsom Ranch will contain elevators which have a \$200/unit/year operating expense premium). This said, CTCAC policy does allow for a 15% reduction in operating expense budgeting through a waiver request process that requires St. Anton to submit letters of support from both banking (debt) and investor (equity) partners consenting to the proposed budget. St. Anton applied for and was granted this waiver for their recently completed Bidwell Pointe project and, though not mentioned specifically in the project narrative, we presume they are planning the same for Folsom Ranch.

We remark here as well that St. Anton’s projections also compare somewhat less favorably with several benchmarks for operating expense trends outlined in a Novogradac & Company study of LIHTC properties nationwide than their Bidwell Place proposal, which we reviewed in March 2020.<sup>1</sup> For example, 2019 operating expenses for new construction LIHTC properties were \$5,351/unit, for properties ranging in size between 100 and 200 total units were \$5,052/unit, and for properties marketed to families were \$5,489/unit. While LIHTC properties located in California specifically (a large data subset in the Novogradac study) averaged \$6,013/unit annually. Operating expenses are inflated at 3% in St. Anton’s initial projections.

In sum, while it is important to remain cognizant that this is an “early stage” review, there is some evidence that St. Anton’s operating expense projections for Folsom Ranch are understated – relying on sustained performance at lower-than industry standard spending levels for ongoing viability.

**LONG TERM PROFORMA/CASH FLOW:** As presented, the 20-year cashflow projection for Folsom Ranch appears viable. Revenues are projected to grow at 2% and operating expenses at 3% – both standard metrics for new construction LIHTC developments; though slightly more conservative than the CTCAC allowable 2.5%/3.5%. As submitted, debt service coverage is 1.16 in year-one, 1.32 in year-ten, and 1.49 in year-twenty. If we “stress” Folsom Ranch by including a placeholder for additional operating expenses of \$387/unit (i.e., to meet the CTCAC non-waiver minimum for elevator buildings), debt service ratios decline but still meet what we would consider the low-end for industry standard threshold underwriting criteria – 1.10 in year-one, 1.23 in year-ten, and 1.38 in year-twenty.

<sup>1</sup> Novogradac 2020 Multifamily Rental Housing Operating Expense Report: Survey and Analysis of LIHTC Properties.

Additionally, and importantly from the City’s perspective, the 20-year cashflow projects just more than \$2M in “free” surplus cash *after* the repayment of the entire deferred developer fee. If St. Anton’s projections are accurate, this would allow for at least the partial repayment of the City’s loan (depending in part on the City’s final loan terms and repayment provisions) which could then be deployed as a gap financing source into future affordable housing projects.

**DEVELOPMENT COSTS:** As submitted, total development costs (outlined in the table below) are \$45.4M or ~\$302K/unit. These projections are significantly lower than the statewide average for new construction 4% LIHTC transactions which in 2019 was \$426,231<sup>2</sup>. Here again, the fact that St. Anton is vertically integrated and employs an identity of interest general contractor – Hurley Contractors (Hurley) – along with its reportedly good track record from the City’s standpoint on its prior project – somewhat mitigates TDA’s concern about cost projections. According to St. Anton development staff, Hurley builds exclusively for St. Anton; employing the same labor force and subcontractors for all multifamily projects. These factors allow for economies of scale across projects and, when staged in geographical and temporal proximity to other St. Anton projects (e.g., Bidwell Phase II) offer procurement and staging efficiencies that would otherwise add costs. In addition to these factors, St. Anton notes that in its perspective the City has a progressive stance on limiting impact fees for affordable housing projects – further driving down total costs. Because of the very preliminary nature of this review, TDA recommends that the City continue monitoring the cost structure for Folsom Ranch to prevent any unwanted “surprises” once hard construction cost estimates are “firmed up” as the pre-development and due diligence review process moves forward.

**FUNDING SOURCES:** St. Anton proposes an overall permanent capital mix (outlined in the table below) which includes a tax-exempt bond first mortgage of \$17.62M, equity generated from the sale of federal 4% LIHTC of ~\$15.14M, the City’s loan of affordable housing funds of \$8.25M, net operating income during lease-up of ~\$270K, a managing general partner loan (GP Loan) of \$2M, deferred interest on the City and GP Loans of \$615K, and a deferred developer fee of ~\$1.47M.

At this early stage of the process St. Anton has not provided letters of interest for either the construction/permanent debt or for the syndication of 4% LIHTC which is currently projected \$1.00/credit. Though similar to the \$1.01/credit pricing St. Anton quoted for the Bidwell Place project, the national average for LIHTC pricing as currently published by Novogradac is \$0.92/credit. The 9% premium St. Anton projects for Folsom Ranch is indicative of both a highly competitive LIHTC syndication market in California and, by extension, strong demand for the delivery of affordable housing units in the Sacramento MSA of which the City of Folsom is a part.

The portion of St. Anton’s developer fee that is deferred represents 33% of the total developer fee. Based on current 20-year cash flow projections, this portion of deferred fee will be fully repaid during the eleventh year of stabilized operations which is within normal expectations of equity investors.

| <b>Development Costs</b>   | <b>Total</b> | <b>Per Unit</b> | <b>% of Total</b> | <b>Per Sq. Ft.</b> |
|----------------------------|--------------|-----------------|-------------------|--------------------|
| Acquisition                | \$5,000,000  | \$33,333        | 11.0%             |                    |
| Site Work and Construction | \$25,777,654 | \$171,851       | 56.8%             | <b>\$210.76</b>    |
| Soft Costs                 | \$6,871,702  | \$45,811        | 15.1%             |                    |

<sup>2</sup> California Tax Credit Allocation Committee: 2019 Annual Report (April 2020)

|                                |                     |                  |                   |                 |
|--------------------------------|---------------------|------------------|-------------------|-----------------|
| Financing Costs                | \$1,738,113         | \$11,587         | 3.8%              |                 |
| Reserves & Start Up            | \$1,467,045         | \$9,780          | 3.2%              |                 |
| Developer Fee                  | \$4,510,000         | \$30,067         | 9.9%              |                 |
| <b>Total Development Costs</b> | <b>\$45,364,514</b> | <b>\$302,430</b> | 100.0%            | <b>\$370.90</b> |
| <b>Sources</b>                 | <b>Total</b>        | <b>Per Unit</b>  | <b>% of Total</b> |                 |
| Mortgage                       | \$17,620,000        | \$117,467        | 38.8%             |                 |
| LIHTC Equity                   | \$15,139,251        | \$100,928        | 33.4%             |                 |
| <b>Folsom Loan</b>             | <b>\$8,250,000</b>  | <b>\$55,000</b>  | <b>18.2%</b>      |                 |
| Lease-Up NOI                   | \$269,835           | \$1,799          | 0.6%              |                 |
| Managing GP Loan               | \$2,000,000         | \$13,333         | 4.4%              |                 |
| Deferred Interest              | \$615,000           | \$4,100          | 1.4%              |                 |
| Deferred Developer Fee         | \$1,470,427         | \$9,803          | 3.2%              |                 |
| <b>Total Sources</b>           | <b>\$45,364,513</b> | <b>\$302,430</b> | <b>100.0%</b>     |                 |
| <b>Gap (or Surplus)</b>        | <b>\$1</b>          | <b>\$0</b>       | <b>0.0%</b>       |                 |

**PRELIMINARY CONCLUSIONS:** Our initial review of the proforma projections and project narrative provided by St. Anton suggests that Folsom Ranch is generally structured within broadly accepted industry norms for multifamily affordable housing transactions. Certainly St. Anton's successful track record with previous multifamily affordable housing developments provides a measure of confidence in their proposal that may otherwise be lacking and helps mitigate high level concerns about operating expenses and development cost projections at the lower end of industry averages in California.

Still, we feel it is important to keep in mind the nascent stage of this proposal for the City's limited pool of affordable housing funds. While St. Anton has submitted a Design Review stage (i.e, unit configuration(s), amenity package, schematic renderings) application to the City that is currently in process, at this time St. Anton does not have land control or preliminary commitments for project funding (debt or equity). The opportunity cost of committing limited funding to a project that may still be more than a year from ground-breaking (and could morph in the meantime as different execution paths, e.g. seeking state LIHTC or other gap funding sources) may well be other pipeline projects that are closer to fruition.



## Attachment 7

Term Sheet for \$3,500,000 loan request

## Loan Term Sheet

**Sage at Folsom**

**City of Folsom**

January 21, 2021

1. **Lender:** City of Folsom, a municipal corporation
2. **Borrower:** Folsom 670, L.P., a California limited partnership (to be formed)
  - i. General Partners
    1. USA Folsom 670, Inc., a California corporation (to be formed), Administrative General Partner, a wholly owned entity of USA Properties Fund, Inc.
    2. Riverside Charitable Corporation, a California nonprofit public benefit corporation, Managing General Partner
    3. TBD – Tax Credit Investor, Limited Partner
3. **Loan Amount:** \$3,500,000
4. **Purpose:** Construction and operation of a 110-unit senior rental housing community of which 100 percent (excluding one management unit) will be affordable and deed restricted for 55 years. The planned affordability mix varies between 30% and 80% AMI using TCAC income and rent limits.
5. **Timing of Funding:** The City's loan will be funded upon closing of the primary construction loan.
6. **Interest Rate:** 3% simple per annum
  - a. **Annual Payments:** Repayment of the principal amount of the loan together with accrued interest will be to the extent "Residual Cash Flow" exists. Principal and interest payments equal to fifty percent (50%) of "Residual Cash Flow" are due beginning on May 1<sup>st</sup> of each year until the loan is fully repaid. Notwithstanding, annual payments on the City's loan will be deferred until the earlier of i) 15 years following Permanent Loan Conversion or ii) repayment of the Deferred Developer Fee, provided further that the Deferred Developer Fee note shall carry no interest.
7. **Residual Cash Flow:** Residual Cash Flow is identified as all income generated by the project after:
  - a. Payment of typical operating expenses for the project, including:
    - i. Property management fee not to exceed fees which are standard in the industry
    - ii. Advertising, legal, accounting, security, and other general office administration expenses
    - iii. Payroll, benefits, and payroll taxes
    - iv. All utilities
    - v. All repair and maintenance costs
    - vi. Property insurance
    - vii. Property taxes
  - b. Replacement reserve replenishment: cash deposited into a reserve for capital replacements of project improvements in such reasonable amounts as are required by the project lenders and/or tax credit investor
  - c. Senior amortizing debt service agreed to by the City as of initial closing.

In any year in which payment on the City's loan is deferred, Residual Cash Flow shall be used exclusively as follows:

- d. First, for payment of an Asset Management Fee to the Limited Partner in the amount of no more than \$7,500 for the first year and escalating at no more than 3% per year thereafter;
- e. Second, for payment of a non-cumulative Managing General Partner fee to the non-profit Managing General Partner for their management duties in the amount of 1% of the effective gross income generated by the affordable units capped at \$25,000 for the first year and an escalating cap at no more than 2% per year thereafter
- f. With all remaining Residual Cash Flow used as payment toward any outstanding Deferred Developer Fee.

These categories as listed above shall not materially change without written approval of the City for the purposes of calculating the annual payment.

8. Term: 35 years from Permanent Loan Conversion. Balance of loan will be due on sale.
9. Balloon Payment: At the expiration of the loan term, 100% of the principal balance of the loan and all accrued interest will be due.
10. Refinancing: In the event of refinancing, the City will subordinate to the new senior loan on substantially similar terms as the original financing.
11. Conditions: The funding of the City loan is conditioned on the following:
  - a. The project has secured the unconditional commitment of all funding sources necessary to develop the project pursuant to the pro forma, including the construction loan, the permanent loan, and 4% federal and state tax credit equity
  - b. The Borrower has fee ownership of the land (the developer currently holds fee simple title of the land)
  - c. The project has secured all building permits or permit-ready letters and is ready to begin construction
  - d. In the event of cost overruns in development of the project, the Developer will defer as much of its estimated developer fee as IRS requirements permit prior to requesting any additional funding from the City.
12. Net Cost Savings/Increased Sources:
  - a. Closing will be contingent upon further review by the City and its determination that Borrower has reasonably maximized the permanent loan and tax credit equity within then current market conditions. As of initial/construction loan closing, to the extent project sources are in excess of project costs (assuming a deferred developer fee of \$1,879,146) and to the fullest extent allowed by applicable CDLAC and CTCAC Regulations and the Project's award of Bond Volume Cap and Tax Credits, the first \$1,000,000 of any such excess shall be used to reduce the City's loan and then any remaining excess shall thereafter be used 50% to further reduce the City's loan and 50% to reduce deferred developer fee.

- b. Following completion of construction Borrower shall submit to City a cost certification prepared by a qualified independent auditor acceptable to City setting forth the total sources and uses for the Project. To the extent the Cost Certification shows that project sources are in excess of project costs (assuming a deferred developer fee of \$1,879,146), to the fullest extent allowed by applicable CDLAC and CTCAC Regulations and the Project's award of Bond Volume Cap and Tax Credits, such an amount shall first be used to reduce the City's loan to \$2.5 million and then any remaining excess shall thereafter be used 50% to further reduce the City's loan and 50% to reduce deferred developer fee.
13. Reporting: Developer will provide the City with annual audited financial statements for the project demonstrating compliance with the formula for the distribution of cash flow.
14. Security: City's loan will be secured by a deed of trust junior to construction and permanent financing sources set forth.



## Attachment 8

Term Sheet for \$4,500,000 loan request (HOME funds)

## Loan Term Sheet

**Sage at Folsom**

**City of Folsom**

January 21, 2021

1. Lender: City of Folsom, a municipal corporation
2. Borrower: Folsom 670, L.P., a California limited partnership (to be formed)
  - i. General Partners
    1. USA Folsom 670, Inc., a California corporation (to be formed), Administrative General Partner, a wholly owned entity of USA Properties Fund, Inc.
    2. Riverside Charitable Corporation, a California nonprofit public benefit corporation, Managing General Partner
    3. TBD – Tax Credit Investor, Limited Partner
3. Loan Amount: \$4,500,000
4. Purpose: Construction and operation of a 110-unit senior rental housing community of which 100 percent (excluding one management unit) will be affordable and deed restricted for 55 years. The planned affordability mix varies between 30% and 80% AMI using TCAC income and rent limits.
5. Timing of Funding: The City's loan will be funded upon closing of the primary construction loan.
6. Interest Rate: 3% simple per annum
  - a. Annual Payments: Repayment of the principal amount of the loan together with accrued interest will be to the extent "Residual Cash Flow" exists. Principal and interest payments equal to fifty percent (50%) of "Residual Cash Flow" are due beginning on May 1<sup>st</sup> of each year until the loan is fully repaid. Notwithstanding, annual payments on the City's loan will be deferred until the earlier of i) 15 years following Permanent Loan Conversion or ii) repayment of the Deferred Developer Fee, provided further that the Deferred Developer Fee note shall carry no interest.
7. Residual Cash Flow: Residual Cash Flow is identified as all income generated by the project after:
  - a. Payment of typical operating expenses for the project, including:
    - i. Property management fee not to exceed fees which are standard in the industry
    - ii. Advertising, legal, accounting, security, and other general office administration expenses
    - iii. Payroll, benefits, and payroll taxes
    - iv. All utilities
    - v. All repair and maintenance costs
    - vi. Property insurance
    - vii. Property taxes
  - b. Replacement reserve replenishment: cash deposited into a reserve for capital replacements of project improvements in such reasonable amounts as are required by the project lenders and/or tax credit investor
  - c. Senior amortizing debt service (including the SHRA loan) agreed to by the City as of initial closing.

In any year during which payment on the City's loan is deferred, Residual Cash Flow shall be used exclusively as follows:

- a. First, for payment of an Asset Management Fee to the Limited Partner in the amount of no more than \$7,500 for the first year and escalating at no more than 3% per year thereafter;
- b. Second, for payment of a non-cumulative Managing General Partner fee to the non-profit Managing General Partner for their management duties in the amount of 1% of the effective gross income generated by the affordable units capped at \$25,000 for the first year and an escalating cap at no more than 2% per year thereafter
- c. With all remaining Residual Cash Flow used as payment toward any outstanding Deferred Developer Fee.

These categories as listed above shall not materially change without written approval of the City for the purposes of calculating the annual payment.

8. Term: 35 years from Permanent Loan Conversion. Balance of loan will be due on sale.
9. Balloon Payment: At the expiration of the loan term, 100% of the principal balance of the loan and all accrued interest will be due.
10. Refinancing: In the event of refinancing, the City will subordinate to the new senior loan on substantially similar terms as the original financing.
11. Conditions: The funding of the City loan is conditioned on the following:
  - a. The project has secured the unconditional commitment of all funding sources necessary to develop the project pursuant to the pro forma, including the construction loan, the permanent loan, and 4% federal tax credit equity
  - b. The Borrower has fee ownership of the land (the developer currently holds fee simple title of the land)
  - c. The project has secured all building permits or permit-ready letters and is ready to begin construction
  - d. In the event of cost overruns in development of the project, the Developer will defer as much of its estimated developer fee as IRS requirements permit prior to requesting any additional funding from the City.
12. Net Cost Savings/Increased Sources:
  - a. Closing will be contingent upon further review by the City and its determination that Borrower has reasonably maximized the permanent loan and tax credit equity within then current market conditions. As of initial/construction loan closing, to the extent project sources are in excess of project costs (assuming a deferred developer fee of \$2,699,626), to the fullest extent allowed by applicable CDLAC and CTCAC Regulations and the Project's award of Bond Volume Cap and Tax Credits, any such excess shall be used to reduce the SHRA Loan. If any excess remains after the SHRA Loan has been eliminated, the first \$1,000,000 shall be used to reduce the City's loan and then any amount remaining thereafter used 50% to further reduce the City's loan and 50% to reduce deferred developer fee.
  - b. Following completion of construction Borrower shall submit to City a cost certification prepared by a qualified independent auditor acceptable to City setting forth the total sources and uses for

the Project. To the extent the Cost Certification shows that project sources are in excess of project costs (assuming a deferred developer fee of \$2,699,626), to the fullest extent allowed by applicable CDLAC and CTCAC Regulations and the Project's award of Bond Volume Cap and Tax Credits, any such excess shall be used to reduce the SHRA Loan. If any excess remains after the SHRA Loan has been eliminated, such amount shall be used to reduce the City's loan to \$3.5 million and then any amount remaining thereafter used 50% to further reduce the City's loan and 50% to reduce deferred developer fee.

13. Reporting: Developer will provide the City with annual audited financial statements for the project demonstrating compliance with the formula for the distribution of cash flow.
14. Security: City's loan will be secured by a deed of trust junior to construction and permanent financing sources set forth and SHRA loan.

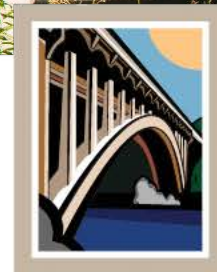


## Attachment 9

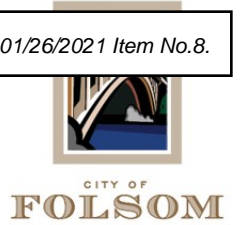
PowerPoint Presentation  
Affordable Housing Fund Request and Direction to Staff



# Affordable Housing Fund Requests and Direction to Staff Resolution No. 10583 & Resolution No. 10584



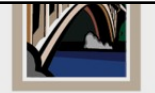
# Folsom Housing Funds



**Table 3 – Folsom Housing Funds**

| Housing Fund Name                 | Source                          | Fund Balance        |             |
|-----------------------------------|---------------------------------|---------------------|-------------|
| Housing Trust Fund (Fund 221)     | Commercial Fees                 | \$1,145,724         | } Fee based |
| Folsom Housing Fund (Fund 238)    | Inclusionary In-lieu Fees       | \$6,129,778         |             |
| Oaks at Willow Springs (Fund 274) | Willow Springs Inclusionary Fee | \$23,730            |             |
| Bonds Fund                        | Former Redevelopment Bonds      | \$138,370           |             |
| <b>Total</b>                      |                                 | <b>\$7,437,602*</b> |             |





## Housing Loan Requests

### **Two Affordable Housing Project Loan Requests**

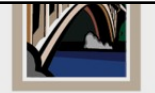
- Sage of Folsom Senior Apartment Project request up to \$4.5M Loan
- Mangini Place Apartment Project request of \$6.8M Loan

**The City has historically received affordable housing fund requests sequentially**

**Two requests for affordable housing funds collectively exceed the current housing fund balance of \$7.437M**

**Seeking City Council direction on the two affordable housing project fund requests**





## Housing Loan Requests

Developer Pro Formas analyzed by City's consultant (TDA) for reasonableness and accuracy of assumptions, methods, and calculations

TDA found the proposed loan requests reasonable and comparable to other City approved per unit loans

December 28, 2020, Congress passed, and the President signed, a very significant COVID-19 relief package that included a permanent 4% floor for of Low-Income Housing Tax Credits (LIHTC) projects' tax credit rate

Reduced subsidy request for Mangini Place



# Sage at Folsom Project Details:

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**

Planning Commission approved in 2020

4.2-acres site

110 multifamily affordable one-bedroom senior units

Affordable to low-, very-low-, and extremely-low-income seniors

Last funding for affordable senior project was in 2007

Currently, there are 322 affordable senior units

Requesting up to \$4.5M loan from City's Housing Fund

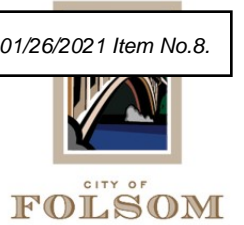
Two different funding scenarios:

- Scenario A - \$4.5M Loan and HOME funds
- Scenario B - \$3.5M Loan and State tax credits



# Sage at Folsom Site Plan and Rendering

01/26/2021 Item No.8.



East Bidwell Street



**ISB** PROPERTIES  
Scholar Way Senior Housing  
FOLSOM, CALIFORNIA

VIEWS

**kuchman** A3.4

# Sage at Folsom Funding Request: Two Scenarios

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**

| <b>Funding Scenarios</b>    | <b>Scenario A (Home Funds)</b>  | <b>Scenario B (CA State TC)</b>   |
|-----------------------------|---|---|
| <b>Staff Recommendation</b> | <b>Contingency Scenario</b>   | <b>Preferred Scenario</b>   |
| <b>Resolution No.</b>       | <b>10584</b>  | <b>10583</b>  |
| <b>Source</b>               | <b>\$800,000</b>  | <b>\$1,836,680</b>  |
| <b>City Loan</b>            | <b>\$4,500,000</b>  | <b>\$3,500,000</b>  |
| <b>Cost Per unit</b>        | <b>\$40,909</b>   | <b>\$31,818</b>   |
| <b>Affordability Mix</b>    | <b>11 @ ELI 30% AMI</b><br><b>58 @ LI 50% AMI</b><br><b>40 @ LI 80% AMI</b><br><b>1 Employee Unit</b> | <b>11 @ ELI 30% AMI</b><br><b>61 @ LI 50% AMI</b><br><b>37 @ LI 80% AMI</b><br><b>1 Employee Unit</b> |



# Mangini Place Project Details:

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**



Planning Commission review proposed for Spring 2021

5.02-acres site

First proposed affordable project in the Folsom Plan Area

152 multifamily affordable one-, two-, and three-bedroom units

Project will provide 152 additional units toward RHNA

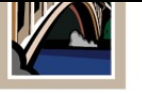
Affordable to low-, very-low-, and extremely-low-income households

Pedestrian focus - walking distance of elementary school

Requesting \$6,860,000 loan from City's Housing Fund

# Mangini Place Proposed Site Plan and Rendering

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**



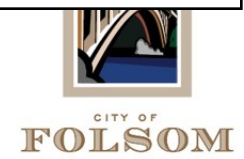
MANGINI PARKWAY

SAVANNAH PARKWAY





# Mangini Housing Loan Request



| <b>Mangini Place Project Comparison Summary</b> |   |  |
|---|---|--|
| <b>Design Development</b>                       | <b>Original</b>                                   | <b>Updated/Revised</b>   |
| <b>Unit #</b>                                   | 150   | 152  |
| <b>Unit Mix</b>                                 | 85 1BR, 51 2BR, 14 3BR                            | 92 1BR, 48 2BR, 12 3BR   |
| <b>Affordability Mix</b>                        | 45 @ 50% AMI<br>103 @ 60% AMI<br>2 Employee Units | 15 @ 30% AMI<br>16 @ 50% AMI<br>68 @ 60% AMI<br>51 @ 70% AMI<br>2 Employee Units |
| <b>Funding Request</b>                          | \$8,250,000<br>\$55,743/restricted unit           | \$6,860,000<br>\$45,733/restricted unit  |

# Folsom Previous Housing Loan Approvals

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**

## Housing Loan Request Comparison

Bidwell Point Mixed-use Project: \$53,000 per affordable unit

Forestwood Apartment Project: \$54,545 per affordable unit

Granite City Apartment Project: \$51,000 per affordable unit

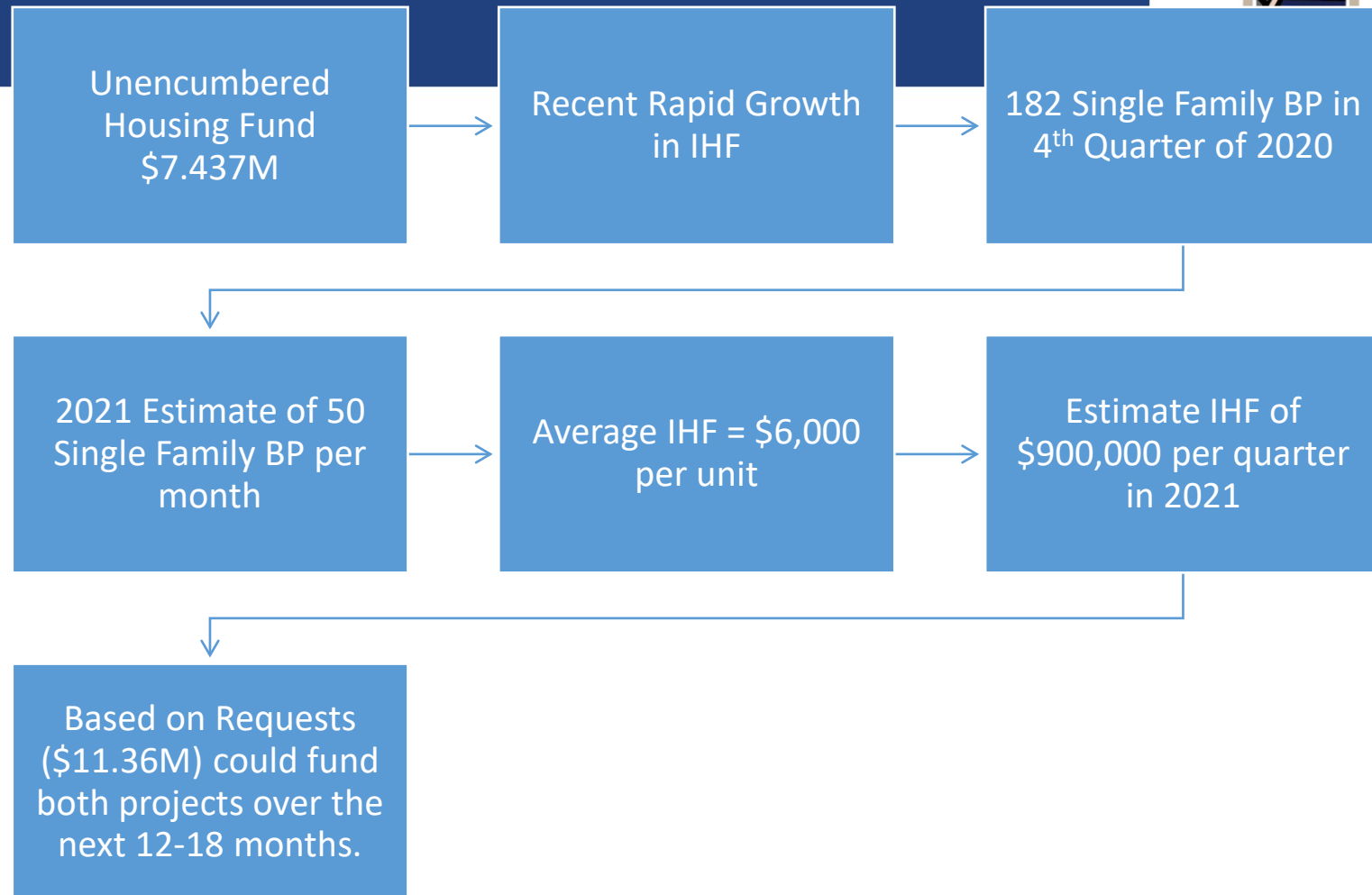
Bidwell Place Project: \$55,333 per affordable unit

**Sage at Folsom Project:** \$40,909/\$31,818 per affordable unit

**Mangini Place Project:** \$45,733 per affordable unit



# Funding Analysis



# Staff Recommendation

01/26/2021 Item No.8.



CITY OF  
**FOLSOM**

## Adopt the following Resolutions for Sage Affordable Senior Housing Project:

Resolution No. 10583 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in the Amount of \$3,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement and Related Documents for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds

Resolution No. 10584 - A Resolution of the City of Folsom Approving an Affordable Housing Loan in an Amount of \$4,500,000 from the City's Housing Fund to USA Properties Fund, Inc. and Authorizing the City Manager to Execute a Loan Agreement And Related Documents and Authorizing the City's Allocation of \$800,000 In Home Funds Received Through Participation in the SHRA HOME Consortium for the Construction of 110 Affordable Senior Housing Units at the Sage at Folsom Multifamily Affordable Housing Development Project, and Appropriation of Funds

Support a future affordable housing loan for the proposed Mangini Place Affordable Housing project and direct staff to bring the item back to City Council with a specific funding plan

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# Folsom City Council Staff Report



|                        |   |
|------------------------|---|
| <b>MEETING DATE:</b>   | 1/26/2021   |
| <b>AGENDA SECTION:</b> | New Business  |
| <b>SUBJECT:</b>        | Appointment of City Council Representatives to Regional Commissions |
| <b>FROM:</b>           | City Clerk's Department   |

**RECOMMENDATION**

Staff requests that the City Council approve the proposed regional commission assignments.

**BACKGROUND / ISSUE**

In addition to their responsibilities on the City Council, the Mayor and City Councilmembers also represent the City of Folsom on a variety of regional commissions. These commissions address important issues of regional interest, and Folsom City Council participation ensures that Folsom’s interests are addressed at the regional level.

**POLICY**

Each commission’s membership and appointing authority are established by their specific enabling documents.

**ATTACHMENT**

Proposed City Council Regional Representation Assignments

Respectfully submitted,

\_\_\_\_\_  
Christa Freemantle, CMC  
City Clerk

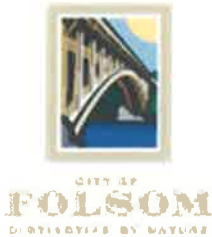


# CITY COUNCIL – Regional Representation Assignmen

01/26/2021 Item No.9.

Proposed for Approval – January 12, 2021

| <u>NAME</u>                                | <u>ASSIGNMENTS</u>   |
|--|--|
| <b>Sarah Aquino<br/>Vice Mayor</b>         | <b>Primary Representative:</b> <ul style="list-style-type: none"> <li>• Association of CA Cities Allied with Public Safety</li> <li>• Folsom/El Dorado County JPA</li> <li>• Folsom Tourism and Economic Development Corporation (TEDCorp)</li> <li>• Sacramento Metropolitan Air Quality Management District</li> </ul>   |
|  | <b>Alternate Representative:</b> <ul style="list-style-type: none"> <li>• SACOG (Sacramento Area Council of Governments)</li> <li>• Sacramento Regional County Sanitation District (Includes Sacramento Area Sewer District)</li> <li>•</li> </ul>   |
| <b>YK Chalamcherla<br/>Councilmember</b>   | <b>Primary Representative:</b> <ul style="list-style-type: none"> <li>• 2x2 – City of Folsom / FCUSD</li> <li>• Sacramento Metro Cable Commission Board of Directors</li> </ul>  |
|  | <b>Alternate Representative:</b> <ul style="list-style-type: none"> <li>• Sacramento Metropolitan Air Quality Management District</li> <li>• Sacramento-Placerville Transportation Corridor JPA</li> <li>•</li> </ul>  |
| <b>Kerri Howell<br/>Councilmember</b>      | <b>Primary Representative:</b> <ul style="list-style-type: none"> <li>• Ad-Hoc Committee for Regional Water Collaboration Study</li> <li>• Capital Southeast Connector Joint Powers Authority</li> <li>• Regional Transit District Board of Directors</li> <li>• Regional Water Authority</li> <li>• Sacramento-Placerville Transportation Corridor JPA</li> <li>• Sacramento Regional County Sanitation District (Includes Sacramento Area Sewer District)</li> </ul> |
|  | <b>Alternate Representative:</b> <ul style="list-style-type: none"> <li>• Sacramento Central Groundwater Authority</li> <li>• Sacramento Groundwater Authority (SGA)</li> </ul>  |
| <b>Mike Kozlowski<br/>Mayor</b>            | <b>Primary Representative:</b> <ul style="list-style-type: none"> <li>• 2x2 – City of Folsom / FCUSD</li> <li>• Greater Sacramento Economic Council</li> <li>• Retirement Board of Authority</li> <li>• SACOG (Sacramento Area Council of Governments)</li> <li>• STA (Sacramento Transportation Authority) / Sacramento Abandoned Vehicle Authority</li> </ul>  |
|  | <b>Alternate Representative:</b> <ul style="list-style-type: none"> <li>• Capital Southeast Connector Joint Powers Authority</li> <li>• Regional Transit District Board of Directors</li> <li>•</li> </ul>   |
| <b>Rosario Rodriguez<br/>Councilmember</b> | <b>Primary Representative:</b> <ul style="list-style-type: none"> <li>• Folsom/El Dorado County JPA</li> <li>• Retirement Board of Authority</li> <li>• Sacramento Homeless Policy Council</li> </ul>  |
|  | <b>Alternate Representative:</b> <ul style="list-style-type: none"> <li>• Folsom Tourism and Economic Development Corporation (TEDCorp)</li> <li>• STA (Sacramento Transportation Authority) / Sacramento Abandoned Vehicle Authority</li> </ul>   |



# Folsom City Council Staff Report

|                        |   |
|------------------------|---|
| <b>MEETING DATE:</b>   | 1/26/2021   |
| <b>AGENDA SECTION:</b> | New Business  |
| <b>SUBJECT:</b>        | Mayor’s Appointment and Confirmation by the City Council of Planning Commissioners to Serve on the Historic District Commission |
| <b>FROM:</b>           | City Clerk's Department   |

### **RECOMMENDATION**

Staff is requesting that the Mayor, with the consent of the City Council, appoint Kevin Duewel and Daniel West as the Planning Commission representatives to the Historic District Commission for the term ending in December 2022, as recommended by the Planning Commission.

### **BACKGROUND / ISSUE**

The terms of all at-large appointments to City of Folsom commissions and committees (except three of the at-large appointments to the Historic District Commission) expire in December of even numbered years. Two members of the Planning Commission are designated by ordinance to serve on the Historic District Commission. Historically the Planning Commission has voted to recommend members of the Planning Commission to serve on the Historic District Commission.

### **POLICY**

Folsom Municipal Code Section 17.52.020 establishes the Historic District Commission as a seven member commission appointed by the Mayor with the consent of the City Council. Specific seat requirements are set forth as:

- A. One representative who is actively involved with historic preservation;

- B. One representative who is a resident of the historic district;
- C. One representative who owns a business within the Sutter Street subarea;
- D. Two planning commissioners;
- E. One representative from a historic district business outside the Sutter Street subarea;
- F. One architect, landscape architect, or other design professional with expertise in historic preservation.

Folsom Municipal Code Section 17.52.040 provides that members of the Historic District Commission are appointed to serve two years.

### **ANALYSIS**

At their January 20 meeting, the Planning Commission nominated Kevin Duewel and Daniel West to serve on the Historic District Commission.

Respectfully submitted,

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Christa Freemantle, CMC  
City Clerk