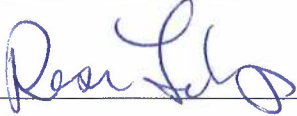


Whatcom County
RFP #25-43
Funding for Workforce Housing Infrastructure and Facilities Projects
EXHIBIT A
CONTRACTOR INFORMATION AND ACKNOWLEDGEMENT

The Proposer acknowledges the requirements of this RFP and funding as described.

Proposing Contractor: Kulshan Community Land Trust

Submitted by	<u>Rose Lathrop</u> <small><i>Print name</i></small>	Title	<u>Executive Director</u>
Address	<u>1715 C St. #201 Bellingham, WA 98225</u>	Phone	<u>360-671-5600</u>
Signature	<u></u>	Date	<u>6/30/25</u>
Email	<u>Rose@kulshanclt.org</u>		



June 13, 2025

ADDENDUM 1

RFP #25-43

Funding for Workforce Housing Infrastructure or Facilities Projects

ATTENTION:

This Addendum 1 consists of 2 pages, including this page.

All documented holders are hereby notified that the RFP documents for the subject RFP have been amended as hereinafter set forth. The following changes, additions, and/or deletions are hereby made a part of the RFP documents.

- The following pages contain answers to questions received by 5:00 PM, Wednesday, June 11, 2025.
- The deadline for responses to this RFP is hereby extended one (1) week. The new deadline is 2:30 PM, Tuesday, July 1, 2025.

NOTE: Acknowledgment of the receipt of this addendum is required in order for the response to be considered complete. Failure to acknowledge receipt of this addendum may become cause for rejection of the proposal response.

Please sign below and submit this page of the addendum with your proposal response:

Signed

A handwritten signature in blue ink, appearing to read "Rose Lathrop", is written over a horizontal line.

Contractor Name

Rose Lathrop, Kulshan Community Land Trust

Whatcom County RFP #25-43
Funding for Workforce Housing Infrastructure and Facilities Projects
Addendum 1 – Responses to Questions Received by 5:00 PM, Wednesday, June 11, 2025

Questions:

As indicated in the RFP, the County encourages brief answers to the questions not already contained in the RFP. Answers to questions received are as follows:

1. Q: Program guidelines identify funding may be used for “housing infrastructure, facilities, or land”; is there any additional information on allowable costs? My interpretation is that any construction/acquisition costs are eligible.

A: All allowable costs are aligned to the guiding RCW 82.14.370 as referenced in the RFP.

2. Q: The guidelines provide a paragraph on prevailing wage rate requirements.

Applicants, including any subsequent subcontractors or subrecipients, must agree to pay prevailing wages for all capital projects. Specifically, RCW 39.12.040 requires that every general contractor and subcontractor on the project, file a Statement of Intent to Pay Prevailing Wages with the Washington State Department of Labor and Industries (L&I) immediately after the contract is awarded and before work begins. In addition, RCW 39.12.120 stipulates that all general contracts must file certified payroll reports at least once per month for all prevailing wage jobs. Lastly, RCW 39.12.040 also requires that every general contractor and subcontractor on the project file an Affidavit of Wages Paid after the work has been completed. Current prevailing wages can be found on the L&I website.

Are you able to confirm that if L&I provides a determination that prevailing wage rates do not apply, for instance when funds are provided as a loan to the project and therefor not regarded as cost to the state, the prevailing wages will not be required?

A: The County will follow state law regarding the payment of prevailing wage. Should L&I make a project specific determination as to prevailing wage, the County may or may not use that determination to fulfill the County’s obligation to follow state law.

3. Q: Question 5 of exhibit B reads “Qualifications and firm names for any proposed subcontracts” – is in reference to firms that would be directly subcontracted to the funds provided by the EDI program? Or is this referencing any firms subcontracted by the project team to do the work (e.g. Architects, etc.)?

A: Subcontractors are reference to firms the EDI recipients are contracting with to complete the contracted project.

4. Q: Question 10 of exhibit B reads “Pro forma demonstrating project financial feasibility [Include private partner contingency agreement.]” – can you clarify what exactly is intended by the phrase ‘private partner contingency agreement’?

A: If private partners are investing in your project an agreement to that effect should be included with the response.

June 18, 2025

ADDENDUM 2

RFP #25-43

Funding for Workforce Housing Infrastructure or Facilities Projects

ATTENTION:

This Addendum 1 consists of 1 page, including this page.

All documented holders are hereby notified that the RFP documents for the subject RFP have been amended as hereinafter set forth. The following changes, additions, and/or deletions are hereby made a part of the RFP documents.

CORRECTIONS:

1. The page numbering in the original RFP is incorrect – there are 9 (nine) pages total, including the Invitation page. The footer beginning on the second page of the pdf of the complete RFP is hereby **CORRECTED** and should note “Page **X** of 8 – Whatcom Co. RFP #25-43”, whereas **X** represents the current page as indicated in the original RFP.
2. The Exhibit number on the header title on the final page of the RFP is hereby **CORRECTED** to be **Exhibit C**.

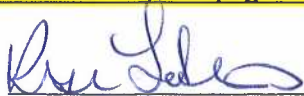
DEADLINE:

1. The deadline for responses to this RFP remains 2:30 PM, Tuesday, July 1, 2025, as extended in Addendum 1.

NOTE: Acknowledgment of the receipt of this addendum is required in order for the response to be considered complete. Failure to acknowledge receipt of this addendum may become cause for rejection of the proposal response.

Please sign below and submit this page of the addendum with your proposal response:

Signed



Contractor Name

Rose Lothrop, Kulshan Community Land Trust

END OF ADDENDUM 2 – WHATCOM CO. RFP #25-43

EXHIBIT B

SCOPE OF PROJECT

1. Project Abstract

In 2022, Kulshan Community Land Trust (KCLT) purchased a 7.98-acre parcel of land at 2039 Thornton Street in Ferndale. The project aligned with the Whatcom County 2022 American Rescue Plan Act (ARPA) funding goals, aiming to stimulate local development by including plans for approximately 50 affordable homeownership units designated for low- and moderate-income households.

The current site plan, designed in response to the pre-application meeting with the City of Ferndale, features clusters of single-family homes, duplexes, and townhomes surrounding central courtyards with plenty of open space. 44 homes are in the current plan with four 1-bedroom, eighteen 2-bedroom, and twenty-two 3-bedroom homes. Using the Community Land Trust model, these homes will be sold to first-time homebuyers under 80% AMI and remain permanently affordable.

The project is expected to begin construction before the end of 2026, with certificates of occupancy by December 2028. By providing affordable homeownership opportunities, this project will stabilize households living and working in Whatcom County. Not only will new homeownership opportunities be created, but the project will also free up rentals for other Whatcom County residents joining our workforce. The project also provides construction jobs, apprenticeship opportunities, and tax revenue.

KCLT is requesting \$192,840 in grant funding to support critical pre-development work for the Thornton Village project. While we have secured a pre-development loan from the Whatcom Community Foundation, the amount is not sufficient to fully cover the comprehensive pre-construction costs required to move this project forward.

Unlike construction-phase financing, which can be supported by project-based loans and sales revenue, pre-development expenses—such as site planning, engineering, permitting, and legal work—must be paid upfront. These costs fall directly on KCLT's organizational operating budget, which is extremely limited due to our nonprofit model focused on permanent affordability rather than profit generation.

This grant will bridge the gap between the pre-development loan and the total costs needed to complete the entitlement process, finalize construction plans, and prepare the project for financing and groundbreaking. Without this support, the project timeline could

be delayed, jeopardizing both the funding stack and the delivery of 44 permanently affordable homes for working families in our community

2. **Project Address:** 2039 Thornton St., Ferndale

Whatcom County Assessor’s parcel number: 3902200795140000

3. **Project Team Details:**

Name	Title and Affiliated Organization (e.g., executive director, project manager.)	Years’ Experience in Affordable Housing
Rose Lathrop	Executive Director KCLT	7
David Ellsworth-Keller & Nina Rommelmann	Homeownership Director KCLT & Homeownership Coordinator KCLT	12+
JP Slagle	Engineer Freeland & Associates	5+
Kate Connelly	Architect Architects FORA	15
Mike Hammes & Sarah Rose	Senior Project Executive & Project Manager, RAM Construction	15+
Ali Taysi	Principal/Owner, AVT Consulting	19

Rose Lathrop became the Executive Director of Kulshan CLT on September 15th, 2024. Rose has 7 years of experience as a Project Manager for local builders and developers, has over a decade of experience in local land use policy, and is a City of Bellingham Planning Commissioner. She has a BA in Environmental Policy and Urban Planning, is a Certified Sustainable Building Advisor, and is a LEED accredited professional.

David Ellsworth-Keller has worked in community and housing development for over 12 years. As the Homeownership Program Director at Kulshan CLT, he has been working

directly with homebuyers and overseeing the financial and programmatic aspects of scattered-site acquisition and new construction projects.

Nina Rommelmann joined the Kulshan CLT team in April of 2025 to support the homeownership program. She has a law degree from the University of Texas and provided legal support to real estate transactions at a Texas law firm. She worked as the Director of Programs for the Houston Community Land Trust from 2018-2021 and has worked as a CLT consultant for other community land trusts.

See **Attachment A** for Organizational Chart and Resumes

4. Project experience and examples:

a. Experience in developing workforce housing:

Kulshan CLT has over 15 years of experience developing workforce housing that serves low- and moderate-income households in Whatcom County. Our first new construction project, Matthei Place (2007), delivered 14 cottage-style homes in Bellingham's Fairhaven neighborhood. In 2015, we added 7 single-family homes on Indiana and Lafayette Streets, including 2 in partnership with Habitat for Humanity and 2 with accessory dwelling units (ADUs) providing affordable rentals to low-income tenants.

Building on this foundation, KCLT has continued to grow its development capacity. In partnership with Habitat for Humanity, we completed 2 single-family homes in Maple Falls (2018) and Sudden Valley (2022) and recently delivered 12 townhomes in Bellingham. Currently, 4 additional homes at Telegraph Townhomes are nearing completion, with sales to income-qualified buyers scheduled for July 2025.

KCLT's current pipeline includes three active developments—Telegraph Townhomes (24 homes), Birchwood LaFreniere Court (18 homes), and Thornton Village (44 homes)—demonstrating our commitment and capacity to deliver permanently affordable workforce housing at a larger scale. Our projects prioritize homeownership opportunities for households earning under 80% AMI, with many serving buyers well below that threshold

b. Experience/expertise in managing affordable housing projects:

Since 2002, Kulshan Community Land Trust (KCLT) has created and stewarded 142 permanently affordable homes, partnering with 235 low- and moderate-income households (under 80% AMI), including 88 successful resales that preserved affordability over generations. While earlier homes were often acquired on the open market—a strategy no longer viable due to escalating prices—KCLT has adapted to directly manage development projects that meet today's affordability challenges.

KCLT has successfully delivered a range of housing types, including condominiums, single-family homes, and modular homes, often in partnership with local government and nonprofit allies. Recent projects include the rehabilitation of three homes purchased from the Bellingham Housing Authority in 2020, and the development of a modular home on city-donated land in 2021.

As both a developer and a steward, KCLT manages complex financing structures that blend public and private sources, including local funding, state Housing Trust Fund, CDBG, HOME, and private philanthropy. We provide comprehensive homebuyer services, including HUD-certified financial counseling, income qualification, and assistance with mortgage financing and down payment support.

5. Qualifications and firm names for any proposed subcontracts:

Ali Taysi provides land use permitting and project management services in the Pacific Northwest and founded AVT Consulting in 2004. He brings nearly 19 years of local project management and hands-on permitting experience.

JP Slagle at Freeland and Associates oversees our stormwater engineering. Freeland & Associates, Inc. provided civil engineering design services for the Lydia Place Heart House project Bellingham, Washington completed in 2022. The project included the development of a new 11-unit 13,500-square-foot transitional housing building with ground floor office space and childcare center. Their scope of design services included parking/sidewalk improvements, municipal utility connections, and stormwater management systems. Freeland & Associates, Inc. also provided civil engineering design services for the following projects in Bellingham: Lighthouse Mission Rebuild project, Bellingham Food Bank, Agape Home for Women and Children and Whatcom County Crisis Stabilization Center.

FORA's extensive housing portfolio features over a million square feet and over 2,200 housing units in a wide variety of award-winning developments built over 40 years. FORA's designs honor and support diverse populations, including very- and extremely-low income residents, seniors, families, the formerly homeless, and developmentally disabled adults. With an attention to materiality, sustainable design, dynamic programming, and community engagement, FORA creates housing that fosters connection, wellness, and empowerment for its residents and the larger neighborhood as a whole. They are 100% women-owned.

RAM Construction is a local builder. Almost all of its employees live in Whatcom County. They emphasize safety, adaptability, and collaboration. RAM was the fourth company in Washington State (1st in construction) to be awarded Washington L&I's Safety Through

Achieving, Recognition, Together (START) certificate, a 5-year collaborative process with L&I. One of RAM's best strengths is finding ways to build projects for non-profits that have some of the most challenging specifications and constraints. To name a few: Heart House, Hope House, Mercy Housing renovations, Whatcom Center for Philanthropy, Lydia Place, DVSAS, and other non-profits with tight budgets and unique reporting requirements.

6. Approach Description:

KCLT's development strategy for Thornton Village emphasizes a measured and strategic pace of development, phasing it to align closely with the availability of state funding from the Housing Trust Fund and the Community Housing Improvement Program (CHIP). This approach ensures that construction and funding cycles are well-coordinated, maximizing resource efficiency and project viability.

Additionally, KCLT's development timeline is structured to correspond with staff capacity, ensuring homes are built and brought to market at a pace that allows for effective outreach, homeowner education, and sales processes. This alignment ensures sustainable project progression, manageable workloads for staff, and successful community integration as Thornton Village progresses.

7. Estimated timeline with key milestones and tasks:

See **Attached B** for Key Milestones and Tasks

8. Status and timeline for all housing development permits and reviews:

See **Attached C** for Permit timeline.

9. Detailed budget breakdown:

See **Attachment D** for Budget Breakdown.

10. Proforma demonstrating project financial feasibility

See **Attachment E** for Proforma

EXHIBIT C

SUPPLEMENTAL QUESTIONS

- 1. What is the project's projected amount of NEWLY generated revenue for Whatcom County?
For example, does the project generate sales tax, property tax, personal property tax, etc.**

This 44-home project is expected to generate approximately \$8,045 monthly in new, ongoing property tax revenue for Whatcom County, while also contributing ~\$6,000–\$12,000 per year in new sales tax revenue from homeowner spending. During construction, the project will generate nearly \$1,338,700 in one-time sales tax revenue plus over \$300,000 in permit and impact fees. While the homes remain permanently affordable to the community, they continue to contribute a steady stream of tax revenue supporting local infrastructure, schools, and services.

- 2. What will the effect of this project be on the natural environment? does the project address any issues related to public health, pollution, or quality of life?**

The project will impact the natural environment due to the transition of the land from a former dairy farm to a housing community. The surrounding neighborhoods have been built up significantly, allowing this development to mesh with the surrounding area as Ferndale grows. The existing house and barn will be moved or demolished. A potential heating oil tank next to the house identified on the Phase 1 Environmental Site Assessment will be removed. Any asbestos found in the home will also be abated.

- 3. Does this project address any existing issues related to public safety and/or does it increase public safety in the future or address a potential future public safety issue?**

The vacant buildings and land were a public safety concern due to vandalism and potential squatters using the site. The need for safe, affordable housing in Ferndale is great, and public health and safety will be improved by providing these new homeownership homes.

- 4. Describe specific quantifiable measures of the outcomes, other than purely jobs or housing units, that will demonstrate project success. Describe how you will measure this and explain what you expect to show as progress toward the outcome.**

Housing stability has been attributed to better health and education outcomes. Thornton Village measures success through a range of community-centered outcomes. We will track homeowner stability, with an expected 90% retention rate after five years, demonstrating the role of affordable homeownership in reducing displacement. Community participation is a key success factor; we aim for 70% of residents to engage in HOA or CLT governance annually. Finally, the diverse unit types — including ADA-accessible homes — will ensure inclusive, multigenerational housing options, with a target of 10% accessible units. Progress toward each outcome will be monitored through annual stewardship reports, homeowner surveys, and operational tracking systems embedded in the CLT model.

- 5. If the project involves broadband infrastructure, describe how it will expand access to affordable and reliable internet for Whatcom County businesses.**

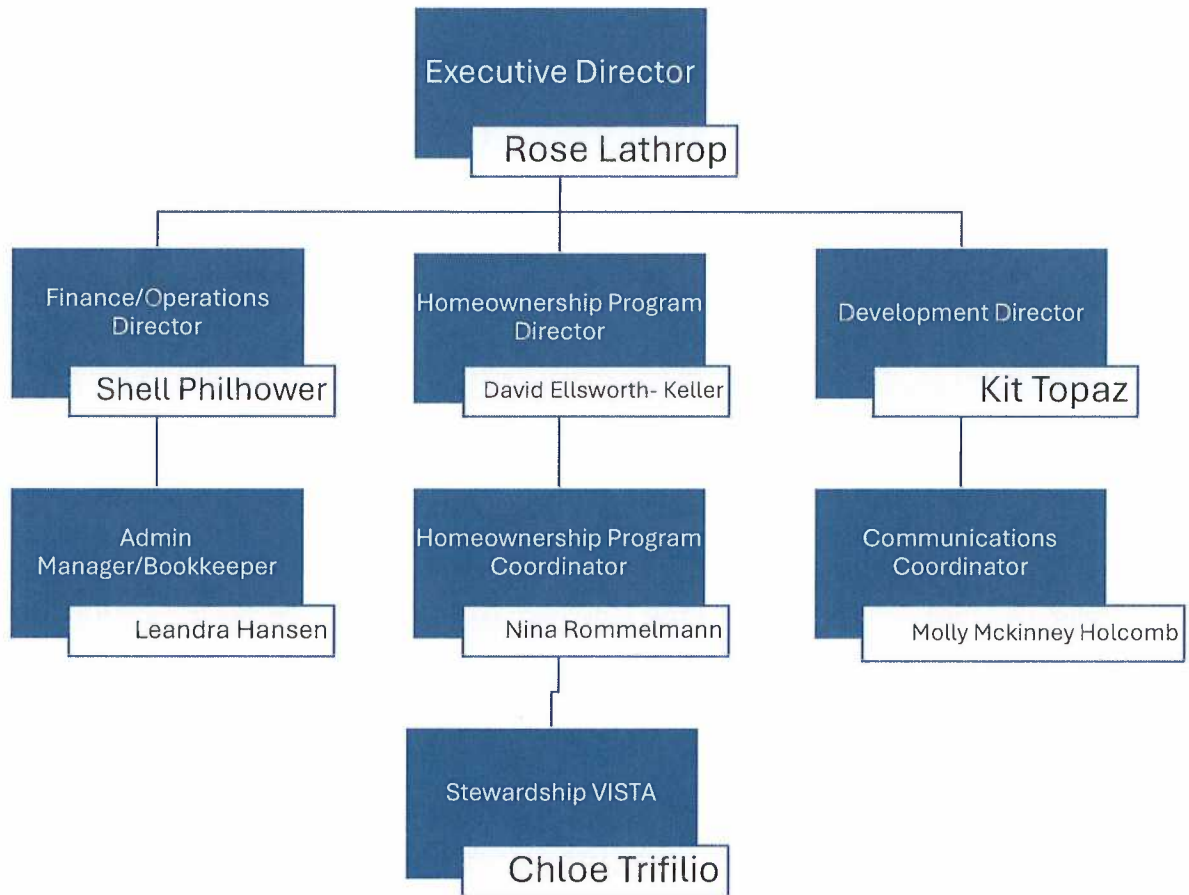
Internet service will be wired to the property for homeowners. While this may not directly impact businesses, for those working from home, connectivity will be especially important.

- 6. IF A LOAN IS REQUESTED:**

Kulshan CLT is requesting grant funding to support the initial and permanent affordability of these homes.



2025 Organization Chart



ROSE LATHROP

Bellingham, WA

360.303.3382 | rose@kulshanclt.org

A dynamic and results-oriented nonprofit leader with a passion for green building, smart growth, community building and empowerment. Known for my vivacious energy and unwavering dedication, I thrive on creating positive change and fostering meaningful connections within diverse communities. Committed to driving strategic initiatives that promote equity, inclusivity, and social impact.

EXPERIENCE

EXECUTIVE DIRECTOR

Kulshan Community Land Trust | Bellingham, WA

2024 – PRESENT

INTERIM EXECUTIVE DIRECTOR/ PROGRAM AND FINANCE DIRECTOR

Sustainable Connections | Bellingham, WA

2012 – 2024

Key Achievements

- Served as a highly valued Interim Executive Director for a 501(c)(3) organization, overseeing a dedicated staff of 36 members and managing a substantial budget of \$3.1 million, effectively maintaining organizational stability and guiding strategic initiatives during the transition period.
 - Facilitated a comprehensive strategic planning process involving staff, board members, and community stakeholders, resulting in the alignment of organizational goals, enhanced collaboration, and increased community engagement.
 - Promoted to Finance Director, where I modernized financial policies and procedures, spearheaded budgeting efforts, developed a comprehensive dashboard for board oversight, and successfully completed the organization's 990 filings.
 - Proficient in grant writing and adept at cultivating relationships with foundations, driving successful individual donor campaigns, and achieving a 20% increase in the organization's budget within a single year.
 - Founded the Whatcom Housing Alliance, a collective impact group of 44 organizations with the mission to create opportunities for more diverse housing choices in all neighborhoods that will contribute toward equitable, prosperous, healthy, and vibrant communities for everyone.
-

EXECUTIVE DIRECTOR

NW American Institute of Architects | Bellingham, WA
2014 – 2016

Worked with the board to support advocacy and policy development to advance the profession. Lead strategic planning and developed communication strategies.
Lead the merger with Seattle AIA and collaborated with regional and national chapters. Managed membership, budget and work plans.

PROJECT MANAGER

Aiki Homes | Bellingham, WA
2005 – 2012

Project manager for the planning and design of low impact, green building developments. Prepared feasibility analyses and application for co-housing developments, and single-family residences.
Organized design charrettes, neighborhood meetings, and public hearings to obtain project approvals.

EDUCATION

BACHELOR OF ARTS ENVIRONMENTAL POLICY AND URBAN PLANNING

Western Washington University
JUNE 2003

- Certified Sustainable Building Advisor
- Leadership in Energy and Environmental Design Accredited Professional

SKILLS

- Microsoft Office and Google Suite
- Financial planning and management
- Quickbooks, Asana, Salesforce
- Management and Human Resources
- Exceptional communication
- Fundraising and development

COMMUNITY INVOLVEMENT

AWARDS AND ACHIEVEMENTS

Living Future Conference Presenter 2019
Home Efficiency Forum Conference Presenter 2018
4 Under 40 Honoree, NW Energy Efficiency Coalition 2016

-
- Downtown Bellingham Partnership Board of Directors, Vice President, 2022-present
 - Shift Zero Steering Committee- Founder and again 2023-present
 - City of Bellingham Planning Commission 2021- present
 - Master Builder's Built Green Executive Committee 2019- 2022
 - NW Ecobuilding Guild Board Member 2015-2017
 - Cascadia Green Building Council NW WA Collaborative Chair 2012-2016
 - Sustainable Connection Board Member August 2010-2012
 - Built Green of Whatcom County Board President 2007-2010

David Ellsworth-Keller

PROFESSIONAL EXPERIENCE

KULSHAN COMMUNITY LAND TRUST, Bellingham, WA

August 2020 - Present: *HomeOwnership Program Director*

ATHENS LAND TRUST, Athens, GA

August 2019 - Present: *Affordable Housing Program Operations Specialist*

- Became a HUD Certified Housing Counselor, with knowledge of fair housing law, proficiency in the provision of financial management guidance, calculating housing affordability, navigating pre- and post-purchase homeownership processes, especially financing, legalities, and delinquency and foreclosure mitigation.
- Co-developed a nascent inclusionary rental housing program based upon incentives for developers and services provided by Athens Land Trust (ALT).
- Provided stewardship guidance for ALT homeowners.
- Worked to support ALT homeowners through COVID-19 related hardships.
- Reviewed and revised Affordable Housing Program procedures and processes.

CHAMPLAIN HOUSING TRUST, Burlington, VT

May 2015 - July 2019: *HomeOwnership Sales Coordinator*

- Responsible for coordinating all aspects of Shared Equity Program transactions including resales, buyer- driven purchases and new construction properties (40-55 transactions annually, located throughout Northwestern Vermont).
- Draft and execute purchase and sale contracts and other real estate documents. \
- Provide technical assistance regarding the Shared Equity Program to all involved constituents (homebuyers, sellers, homeowners, developers, realtors, community partners, and the general public).
- Develop rehab plans for properties, alongside construction project manager.

CHAMPLAIN HOUSING TRUST, Burlington, VT

September 2010 – May 2015: *Leasing and Property Manager*

- Created and maintained operating budgets for five Housing Limited Partnerships with 29 buildings and 62 homes.
- Maintained vacancy information for 1,391 CHT apartments.
- Developed and placed advertising for available homes, including maintaining CHT's website listings for available homes.
- Maintained Site Compliance Specialist status to ensure compliance with all income and occupancy restrictions (LIHTC, HOME, and HUD); performed program certification and reporting.
- Collected and compiled data, prepared reports as needed for evaluation and resource development.
- Demonstrated knowledge of fair housing regulations (both Federal and State).

EDUCATION

MARLBORO COLLEGE, Marlboro, VT **08/2018** Master of Science in Management: Mission-Driven Organizations

NORTHERN ARIZONA UNIVERSITY, Flagstaff, AZ **12/2004** Bachelor of Science in History, Minors in Religious Studies and Asian Studies with an emphasis in Women's and Gender Studies (*magna cum laude*)

SKILLS/TRAININGS

Proficiency in Google (G Suite), Microsoft Office, and Salesforce (HomeKeeper) platforms
Fair Housing training, Diversity and Cultural Competency training, HUD certification in housing counseling

Nina C. Rommelmann

Bellingham, WA 98226 | 713-927-9729 | ninacrommelmann@gmail.com

PROFESSIONAL EXPERIENCE

Homeownership Program Coordinator, Kulshan Community Land Trust | 2025-present
Bellingham, WA (in-person)

New Programs Manager, Arnold Ventures LLC | 2021-2023

Houston, TX (in-person)

Arnold Ventures is a national philanthropy. As manager of the New Programs team, I:

- Managed \$90+ million in active philanthropic investments across three portfolios
- Oversaw project timelines, workflows, and deliverables during proposal development
- Organized and supported calls and meetings with grantees, partners, subject matter experts
- Followed up on action items after all calls and meetings, ensuring projects moved forward
- Managed Salesforce database of existing and potential grants and investments
- Drafted grant/investment proposals and co-presented proposals to the Board of Directors
- Supported development of investment strategies and co-drafted strategy memoranda
- Working with the Director on a two-person team, successfully deployed over \$50 million in new program-related investments in support of affordable housing production

Director of Programs, Houston Community Land Trust | 2018-2021

Houston, TX (hybrid)

Houston Community Land Trust is the Houston region's first community land trust. As a co-founder and director, I:

- Designed, developed and oversaw the organization's homebuyer assistance programs
- Successfully assisted 50 first-time low-income homebuyers, over 90% of whom were people of color, in the organization's first two years
- Drafted the program's policies and procedures and designed team workflows
- Customized Salesforce apps for workflow and client management
- Wrote program collateral; designed and drafted website content
- Negotiated transactional documents and conducted real estate purchases
- Managed a team of four homebuyer-facing employees
- Established strong external partnerships to secure services for homebuyers, build strong community and government relationships, and establish organizational credibility
- Gave presentations to diverse audiences on the community land trust model

Program Development Consultant, Houston Habitat for Humanity | 2023-2024

Houston, TX (remote)

As an independent consultant, I:

- Drafted an MOU outlining a new partnership between Habitat and a partner organization
- Helped Habitat's homebuyer services team shape a pathway for scaling up annual home sales, integrate new tools and templates into their workflow, and improve legal compliance in the home sales process

1

Program Development Consultant, *Homestead Community Land Trust* | 2020-2021

Seattle, WA (remote)

As an independent consultant, I:

- Facilitated a re-design of the homebuyer support team's processes, streamlining workflow to help the team meet upcoming home sales goals with a focus on increasing racial equity and inclusion in the organization's service model
- Delivered comprehensive updates to the organization's policy and procedure manuals and other program collateral
- Customized Salesforce workflows, reports and dashboards to increase efficiency and collaboration and reduce errors in program administration

Associate Attorney, Real Estate, *Baker Botts LLP* | 2017-2018

Houston, TX (in-person)

Baker Botts is a Texas-based law firm. As an associate, I provided legal support to real estate purchase, sale and financing transactions.

EDUCATION AND ADMISSIONS

Admitted to the State Bar of Texas | 2017

Juris Doctor | 2017

University of Texas School of Law, Austin, TX

Chancellor-at-Large of the Class of 2017 (awarded to the top 16 GPAs in each class in year two)

Bachelor of Arts in Interdisciplinary Studies | 2011

New York University, New York, NY

OTHER EXPERIENCE & ACTIVITIES

Continuing Education Credits

"Fundamentals of Project Management", Rice University Glasscock School, 2020

Presentations and Board Memberships

- Co-presenter, *Community Land Trusts*, American Bar Association forum, 2021
- Co-presenter, *Community Land Trusts*, Houston Bar Association presentation, 2020
- *Houston Housing Collaborative* Coordinating Team, 2020-2021
- *Houston Community Land Trust* Founding Board of Directors, 2018
- *Texas Law Fellowships* Board of Directors, 2015-2016

Attachment B

Thornton St. Ferndale Key Milestones and Tasks

Category	Tasks	Date Completed or Expected Complete	Notes / Status
Site Control	Purchase and Sale Agreement / Option	9/2/2021	
Site Control	Closing	9/2/2022	Warranty Deed
Feasibility/Due Diligence	Site survey	12/18/2023	Topo Survey
Feasibility/Due Diligence	Market study	9/1/2025	Projected
Feasibility/Due Diligence	Wetland Delineation	6/15/2023	Completed
Feasibility/Due Diligence	Phase I Environmental Assessment	4/30/2025	Completed
Feasibility/Due Diligence	Archeology Report	1/9/2025	Completed
Feasibility/Due Diligence	SEPA	9/15/2025	Projected
Feasibility/Due Diligence	NEPA clearance	6/15/2026	Projected
Feasibility/Due Diligence	Choice Limiting Actions clearance	6/15/2026	Projected
Feasibility/Due Diligence	Capital needs assessment		Ongoing
Feasibility/Due Diligence	Neighborhood notification (if required)	2/1/2026	Projected
Feasibility/Due Diligence	Inspection of first home	11/15/2027	Projected
Financing	Appraisal	6/1/2026	Projected
Financing	Financial underwriting	7/1/2026	Projected
Financing	Application for funding Whatcom Community Foundation	4/8/2025	Completed
Financing	Application for funding WA Commerce HTF	9/15/2025	Projected
Financing	Application for funding CHIP	9/15/2025	Projected
Financing	Construction cost estimate		Ongoing
Financing	Lender selection	1/15/2026	Projected
Financing	Award date for funding source Whatcom Community Founda	6/15/2025	
Financing	Award date for funding source WA Commerce HTF	1/15/2026	Projected
Financing	Award date for funding source CHIP	1/15/2026	Projected
Financing	Capital finance closing	8/1/2026	Projected
Financing	Permanent financing conversion	12/30/2028	Projected
Design/Permitting	Building permit pre-application meeting	5/23/2025	Completed
Design/Permitting	Preliminary drawings completed	9/15/2025	Projected
Design/Permitting	Zoning approval	9/15/2025	Projected
Design/Permitting	Site plan approval	9/15/2025	Projected
Design/Permitting	Building permit application submitted	3/15/2026	Projected
Design/Permitting	Building permits issued	7/31/2026	Projected
Design/Permitting	Final plans and specs completed	10/15/2026	Projected
Construction	Selection of general contractor	3/20/2024	Completed
Construction	Begin construction	8/1/2026	Projected
Construction	First home issued Certificate of Occupancy/Equivalent	12/1/2027	Projected
Construction	Last home issued Certificate of Occupancy/Equivalent	12/30/2028	Projected
Deliverables	Interim Progress Report 1	6/1/2026	projected
Deliverables	Interim Progress Report 2	12/30/2026	projected
Deliverables	Qualified Buyers Under Contract	10/1/2027	projected
Deliverables	Orientation and Walk Through with Buyers	1/1/2028	projected
Deliverables	Interim Progress Report 3	6/1/2027	projected
Deliverables	Sale to 1st homebuyer	1/31/2028	projected
Deliverables	Sale to final homebuyer	3/31/2029	projected
Deliverables	Final Report Submitted	6/1/2029	projected

Attachment C

2039 Thornton Ferndale Permit and Review Timeline

Site Control	Closing	9/2/2022	
Feasibility/Due Diligence	Site topographic survey	12/18/2023	
Feasibility/Due Diligence	Phase I Environmental Assessment	4/30/2025	
Feasibility/Due Diligence	SEPA	9/15/2025	projected
Feasibility/Due Diligence	NEPA clearance	6/15/2026	projected
Feasibility/Due Diligence	Choice Limiting Actions clearance	6/15/2026	projected
Feasibility/Due Diligence	Neighborhood notification	2/1/2026	projected
Feasibility/Due Diligence	Inspection of first home	11/15/2027	projected
Design/Permitting	Zoning approval	9/15/2025	projected
Design/Permitting	Site plan approval	9/15/2025	projected
Design/Permitting	Building permit application submitted	3/15/2026	projected
Design/Permitting	Building permits issued	7/31/2026	projected
Design/Permitting	Final plans and specs completed	10/15/2026	projected

Attachment D

Thornton Village Pre-Development Budget

Costs		Year 1	Year 2	Year 3
Buyer's Appraisal	\$ 10,000	\$ 10,000		
Market Study	\$ 5,000	\$ 5,000		
Architect	\$ 300,000	\$ 70,000	\$ 200,000	\$ 30,000
Engineering	\$ 180,000	\$ 80,000	\$ 50,000	\$ 50,000
Contractor	\$ 130,000	\$ 65,000	\$ 65,000	
Environmental Assessment	\$ 5,000	\$ 5,000		
Geotechnical Study	\$ 6,200	\$ 3,100	\$ 3,100	
Boundary & Topographic Survey	\$ 10,000	\$ 5,000	\$ 5,000	
Legal - Real Estate	\$ 15,000	\$ 5,000	\$ 5,000	\$ 5,000
Developer Fee	\$ 45,000	\$ 15,000	\$ 15,000	\$ 15,000
Project Management / Dev. Consultant Fees	\$ 75,000	\$ 25,000	\$ 25,000	\$ 25,000
Other Consultants	\$ 20,000	\$ 10,000	\$ 5,000	\$ 5,000
Community Outreach	\$ 25,000	\$ 15,000	\$ 10,000	
Soft Cost Contingency	\$ 75,000	\$ 30,000	\$ 25,000	\$ 20,000
Other: Carry	\$ 79,640	\$ 16,000	\$ 23,640	\$ 40,000
SUBTOTAL	\$ 980,840	\$ 359,100	\$ 431,740	\$ 190,000

Sources		Year 1	Year 2	Year 3
Whatcom Community Foundation	\$ 788,000	\$ 166,260	\$ 431,740	\$ 190,000
Whatcom County EDI Grant	\$ 192,840	\$ 192,840		
SUBTOTAL	\$ 980,840	\$ 359,100	\$ 431,740	\$ 190,000

Attachment E

Thornton Village Development Proforma

Source Name	Source Type	Proposed Amount	Committed Amount
Commerce- HTF	State	\$ 5,000,000.00	
Commerce CDBG/CHIP	State	\$ 4,500,000.00	
Community Frameworks/SHOP	Federal	\$ 750,000.00	
Whatcom County AARPA	County		\$1,250,746.60
Whatcom County EDI*	Grant/Loan	\$ 1,000,000.00	
Whatcom Community Foundation	Private		\$788,000.00
WA State Housing Finance Commission	Private	\$ 9,721,405.00	
Subtotal		\$ 20,971,405.00	\$ 2,038,746.60

Total Production Sources **\$ 23,010,151.60**

*we anticipate loan requests for system development charges and impact fees

Development Budget	Amount	
Acquisition Costs	\$ 1,250,746.60	
Construction	\$ 18,498,939.00	
Soft Costs	\$ 980,840.00	
Construction Financing	\$ 412,000.00	
Other Development Costs	\$ 1,867,626.00	
	\$	
Subtotal		\$ 23,010,151.60

Total Development Cost **\$ 23,010,151.60**

Thornton Village Detailed Development Budget

		Affordable							
		Total	Source: Buyers Mortgages	Source: HTF	Source: CHIP/CDBG	Source: SHOP & HOME	Source: CHIP	Source: AARPA & EDI	
Acquisition Costs:									
Land	\$	1,250,747						\$ 1,250,747	
Existing Structures	\$	-							
Liens	\$	-							
Closing, Title & Recording Costs	\$	-							
Down Payment	\$	-							
Extension payment	\$	-							
Other: <input type="text"/>	\$	-							
		SUBTOTAL	\$ 1,250,747	\$ -	\$ -	\$ -	\$ -	\$ 1,250,747	
Construction:									
Demolition	\$	75,000	\$ 75,000						
New Building	\$	13,000,000	\$ 2,405,416	\$ 5,000,000	\$ 4,500,000	\$ 710,000		\$ 384,584	
Contractor Profit	\$	492,253	\$ 492,253						
Contractor Overhead	\$	325,000	\$ 325,000						
New Construction Contingency	<input type="text" value="10%"/>	\$ 1,450,000	\$ 1,450,000						
Site Work / Infrastructure	\$	1,000,000					\$ 1,000,000		
Off site Infrastructure	\$	200,000					\$ 200,000		
Environmental Abatement - Building	\$	40,000				\$ 40,000			
Sales Tax	\$	1,336,686	\$ 1,336,686						
Bond Premium	\$	80,000	\$ 80,000						
Equipment and Furnishings	\$	500,000	\$ 500,000						
Other: <input type="text"/>	\$	-							
		SUBTOTAL	\$ 18,498,939	\$ 6,664,355	\$ 5,000,000	\$ 4,500,000	\$ 750,000	\$ 1,200,000 \$ 384,584	
Soft Costs:									
Buyer's Appraisal	\$	10,000	\$ 10,000						
Market Study	\$	5,000	\$ 5,000						
Architect	\$	300,000	\$ 230,000					\$ 70,000	
Engineering	\$	180,000	\$ 80,000					\$ 100,000	
Environmental Assessment	\$	5,000	\$ 5,000						
Contractor	\$	130,000	\$ 130,000						
Geotechnical Study	\$	6,200	\$ 6,200						
Boundary & Topographic Survey	\$	10,000	\$ 10,000						
Legal - Real Estate	\$	15,000	\$ 15,000						
Developer Fee	\$	45,000	\$ 45,000						
Project Management Fees	\$	75,000	\$ 52,160					\$ 22,840	
Other Consultants	\$	20,000	\$ 20,000						
Community Outreach	\$	25,000	\$ 25,000						
Soft Cost Contingency	\$	75,000	\$ 75,000						
Bridge Loan Interest	\$	79,640	\$ 79,640						
Other: <input type="text"/>	\$	-							
		SUBTOTAL	\$ 980,840	\$ 788,000	\$ -	\$ -	\$ -	\$ 192,840	
Construction Financing									
Construction Loan Fees	\$	20,000	\$ 20,000						
Construction Loan Expenses	\$	5,000	\$ 5,000						
Construction Loan Legal	\$	2,000	\$ 2,000						
Construction Period Interest	\$	350,000	\$ 350,000						
Lease-up Period Interest	\$	35,000	\$ 35,000						

SUBTOTAL		\$ 412,000	\$ 412,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Development Costs									
Real Estate Tax	\$ -								
Insurance	\$ 125,000	\$ 125,000							
Relocation	\$ -	\$ -							
Bidding Costs	\$ -	\$ -							
Permits, Fees & Hookups	\$ 190,050	\$190,050							
Impact/Mitigation Fees	\$ 422,576							\$ 422,576	
Development Period Utilities	\$ 10,000	\$ 10,000							
Developer Fee	\$ 450,000	\$ 450,000							
Accounting/Audit	\$ 15,000	\$ 15,000							
3 rd Party Certification of Final Development Cost	\$ 5,000	\$ 5,000							
Real Estate Transaction Expenses	\$ 650,000	\$ 650,000							
Carrying Costs at Rent Up/Lease Up Reserve	\$ -								
SUBTOTAL	\$ 1,867,626	\$ 1,445,050	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 422,576	
Total Development Cost:									
		\$ 23,015,152	\$ 9,314,405	\$ 5,000,000	\$ 4,500,000	\$ 750,000	\$ 1,200,000	\$ 2,250,747	
Total Sources:									