



THE CALIFORNIA HOUSING
PARTNERSHIP
35 CELEBRATES
YEARS



CELEBRATING 35 YEARS OF PARTNERSHIP

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The California Housing Partnership was formed in 1988 by tenant lawyers and advocates who, after a multi-year struggle, persuaded the state Legislature and Governor that it was critical to have a private nonprofit entity with the financial technical expertise to help community-based nonprofit and tenant organizations acquire and preserve thousands of affordable homes at risk of being converted to market and to advise state and federal governments on policy changes necessary to advance this work.

I had the opportunity to witness first-hand the power of the Partnership's work in the late 1990s when I was part of a City team working with San Francisco tenant leaders to successfully acquire and preserve more than 3,000 federally assisted affordable homes. By the time I joined the Partnership as CEO in September 2002, the focus of our work had begun to shift away from preservation towards the production of new affordable homes both in recognition of the progress that had been made preserving federally assisted homes and the state's growing shortage of affordable homes.

Thirty-five years later, the Partnership has helped our nonprofit partners leverage \$35 billion in financing to create and preserve 93,000 affordable rental homes for low-income Californians. We also focused on capacity and training, serving as the lead faculty and curriculum designer for LISC's Housing Development Training Institute for more than two decades as well as holding hundreds of separate trainings. In total, we have now helped more than 41,000 people increase their skills and knowledge around affordable housing preservation, production and related policies.

When I joined the Partnership in 2002, we were a small team of eight people focused on providing technical assistance on housing finance transactions and providing input on related state and federal policies. Today, we are a team of 44 providing a wide range of services including financial and sustainability technical assistance as well as policy research, education and leadership.

The last five years with the Partnership have been poignant and transformational, as they have been for the industry and society at large. We now find ourselves on the other side of a global pandemic with even deeper purpose, investment and grounding in equitable outcomes for Californians with low incomes, especially those in communities of color, as evidenced by expanding our work with these organizations and initiating a new area of work assisting and learning from tribal entities we long ignored.

Internally, we have adopted [Core Equity Values](#) to guide our work and created an [Equity Policy Advisory Board](#) to ensure that we live up to these values. We have also expanded our leadership team to include six managing directors who now work side by side with me in making policy decisions in consultation with our staff and board. I am grateful and excited to lead alongside this extraordinarily talented team of dedicated professionals as we find more ways of advancing our mission partnering with passionate housing providers, tenant leaders and policy makers.



Sincerely,

A blue ink handwritten signature of Matt Schwartz.

Matt Schwartz
PRESIDENT AND CEO

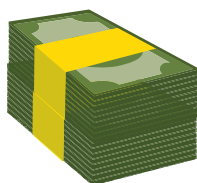
Cover photo center:
Fairview Heights, Courtesy of LINC
Housing

Cover photo bottom right:
Brooklyn Basin by David Wakely,
courtesy of MidPen Housing

PARTNERSHIP BY THE NUMBERS



Over the past 35 years, the California Housing Partnership has helped more than 100 nonprofit and local government partners throughout California



\$35 BILLION
in public and private
funding obtained



93,000 HOMES
for low-income Californians
created and preserved



**262,000 LOW-INCOME
CALIFORNIANS**
served across 42 counties



\$139 MILLION
clean energy
financing accessed



**200,000
METRIC TONS**
of greenhouse gas
emissions reduced



DOZENS OF LAWS
and housing and clean energy
programs contributed to



41,000 PEOPLE
trained on affordable
housing finance,
sustainability and policy



Senior Housing Finance Consultant, Genise Choy, teaching Affordable Housing Finance Fundamentals at the San Diego Housing Federation Conference, Fall 2023

FIGHTING CLIMATE CHANGE

Affordable Homes Near Transit and Jobs

Nearly ten years ago, with funding from the Ford Foundation and assistance from TransForm and Housing California, the California Housing Partnership commissioned the research that helped persuade State leaders to fund the ground-breaking Affordable Housing and Sustainable Communities (AHSC) program from Cap-and-Trade auction revenues. Today, the AHSC program invests more than \$700 million annually in creating affordable homes and transit-related infrastructure to benefit underserved Californians.

Since the program was formed, the Partnership has provided technical assistance to more than 160 AHSC applications – 33 of which have received \$482 million in funding and are in various stages of development. Overall, the AHSC program has now funded 185 developments across the state, allocating more than \$3 billion into new affordable housing and transit investments that have:



AHSC award-winner, Archway Commons, Photo Courtesy of EAH Housing



Reduced more than 4.4 million metric tons of CO₂



Removed approximately 31,734 cars annually from the road and reduce car travel in California by 386 million miles



Created 17,933 high quality, affordable homes for low income Californians



Constructed 242 miles of new or improved bike lanes and 1,589 new or improved crosswalks



Created more than 36,005 jobs, \$3.5 billion in wages and business income, and \$1.31 billion in revenue for State and local government during construction

Advancing Equity in Clean Energy Investments

After co-leading successful education and advocacy efforts that led to the creation of the \$1 billion **Solar On Multifamily Affordable Housing (SOMAH)** program in 2018, the California Housing Partnership is an implementation partner for the program. SOMAH benefits to low-income Californians living in affordable housing will include:



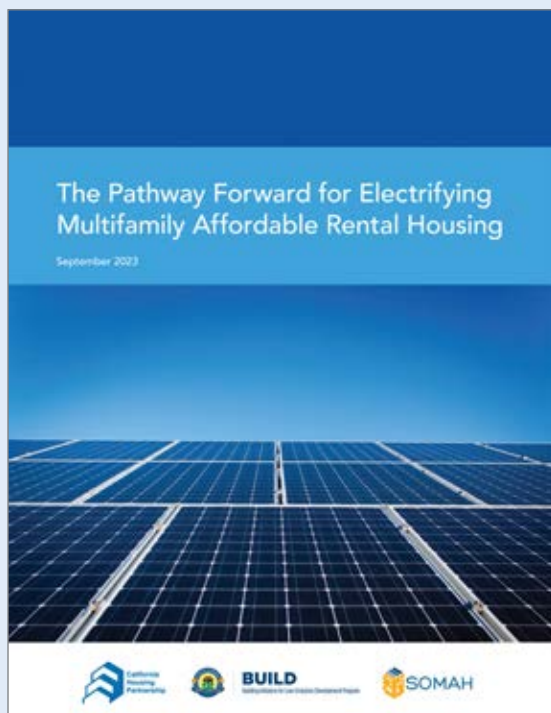
\$100 million annually for 10 years to fund solar photovoltaic energy installations



300 megawatts of solar photovoltaic panels installed by 2030



Millions in an annual utility bill savings for an estimated 255,000 low-income households across the state



LIWP Program Project, SOMA Studio & Family Apartments, San Francisco. (Photo Courtesy of Tenderloin Neighborhood Development Corporation)

Launched in 2016 and shaped by the Partnership's research and advocacy, **California's Low Income Weatherization Program for Multifamily Properties (LIWP)** has helped the state make substantial progress in reducing greenhouse gas emissions in multifamily properties and saved millions of dollars on energy bills for low-income residents. To date, the program has invested \$101.5 million to install energy efficiency measures as well as rooftop solar photovoltaic and solar hot water heating systems for low-income households. In collaboration with the Association for Energy Affordability and California Community Services Development, the California Housing Partnership has helped LIWP achieve:



20,000 low-income households served at completion of retrofits



200,160 metric tons of CO2 reduced



30% projected energy bill savings for residents



44% reduction in energy usage

CULTIVATING OUR EQUITY VALUES



In 2019, the Partnership began an organization-wide journey to explicitly define its equity goals and values. The journey has been complete with challenging conversations surrounding white dominant culture and the ways it manifests in our work, continuous participation in cultural competency trainings to further improve our service delivery with partners such as Tribal organizations as well as dedicated focus on ensuring state housing resources extend to emerging and historically underestimated developers. Three major outgrowths of this work include:

Equity Policy Advisory Board (EPAB).

Created in 2022, this board provides feedback on the Partnership's annual policy agenda and adds low-income renter perspectives into the discussion of our legislative and annual work priorities and consists of representatives from roughly a dozen tenant, tribal, community-based and legal services organizations throughout the state.

Equity Working Group. The Equity Working Group (EWG) formed in late 2020 as an outgrowth of our equity values work and is staffed by volunteers from all parts of the organization. The EWG's purpose is to help the Partnership continue to make progress towards a more equitable, diverse, and inclusive work environment. The EWG was instrumental in helping the Partnership overhaul its recruitment, hiring and compensation policies along with many other internal policies and continues to help leadership identify the key issues and facilitate important equity-focused conversations.

Equity Policy Research Fellowship Program.

The Partnership launched a new paid summer fellowship program in 2022 with the goal of increasing the diversity and capacity of affordable housing policy advocates and researchers in our field. The fellowship is a hands-on 12-week, tailored educational program for undergraduate and graduate students from social justice-related fields with a demonstrated interest in affordable housing. The Partnership hosted seven fellows over the two years the program has been active.



Research Director Anthony Vega, Senior Research/Policy Associate Matt Alvarez-Nissen with the 2022 Equity Research Fellows

CRAFTING CALIFORNIA'S ROADMAP HOME



Roadmap Home 2030

In 2021, after nearly two years of intensive research and policy discussions with hundreds of stakeholders across the state and following two decades of failed attempts to get state leaders to create their own comprehensive long-term plan, the Partnership and Housing California, launched the Roadmap Home 2030.

The Roadmap Home demonstrates how, using an evidence-based, equity-centered, and comprehensive approach, over the next ten years, the state can end homelessness, create affordable homes for those struggling the most, ensure that Californians can stay in their homes, and advance racial equity and economic inclusion — creating a California where everyone can thrive.

To meet the full need over the next 10 years, the Roadmap Home 2030 sets the following goals:

 Roadmap Home 2030

Goals

01

CREATE AFFORDABLE HOMES

Create 1.2 million new affordable homes for low-income Californians, including for those experiencing homelessness.

02

PROTECT LOW-INCOME RENTERS

Protect 1 million low-income renter households from losing their homes, including more than 300,000 who face eviction each year.

We have to put racial equity front and center, because for too long we have not, and the consequences of that are playing today and it's not.

03

END HOMELESSNESS

End homelessness for more than 150,000 Californians who are unhoused every night and over 400,000 who are unhoused.

04

ENSURE RACIAL EQUITY

Close racial equity gaps in housing and homelessness that have been the result of decades of racist housing policies.



Matt Schwartz presenting Roadmap Goals during 2021 Launch Presentation

To meet these goals, the Roadmap Home includes 51 state and six federal policy solutions designed that work synergistically as a package to advance systems reform and structural change in five core areas:

Invest in Our Values

Provide ongoing resources at scale to advance racial equity and create affordable homes for people experiencing homelessness and those struggling to make ends meet.



Promote Fairness

Restructure tax and finance systems to rectify structural discrimination and generate revenue to meet the scale of the need.



Reimagine Growth

Make it easier and cheaper to develop affordable homes in all communities, including opportunity-rich areas where Black, Latinx, Indigenous, and other people of color have been excluded.



Protect People

Ensure that renters have equitable access to housing, can stay in their homes and communities, and are protected from market speculation and systemic discrimination.



Create Efficiency and Accountability

Ensure that taxpayer dollars are spent wisely and equitably through clear leadership, streamlined processes, and seamless coordination.



Next Steps

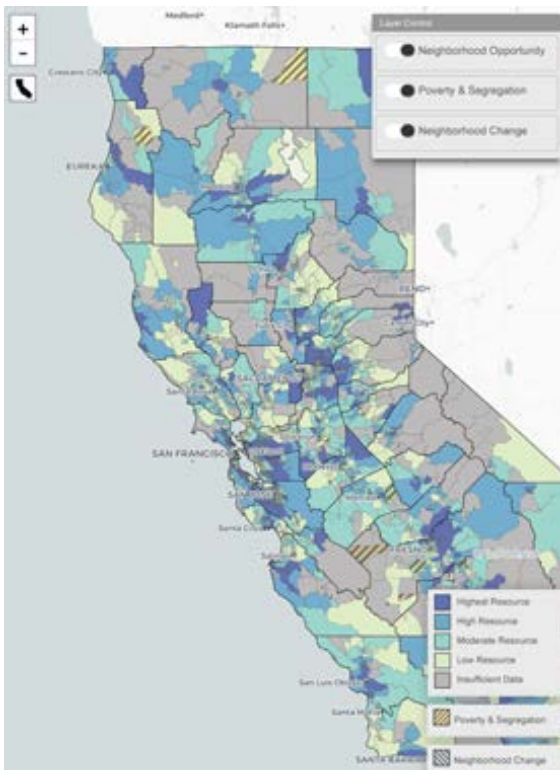
In 2024, Housing California and the Partnership and a growing coalition of partners across the state will be undertaking a comprehensive update dubbed Roadmap Home 2.0. The updated Roadmap is expected to add several new sections to address missing policy areas including affordable housing's role in helping the state meet its climate goals and specific policies developed by tribal leaders to meet their unique needs.

CONTRIBUTING TO AFFORDABLE HOUSING RESEARCH AND POLICY

"The California Housing Partnership is an amazing source of information and evidence-based policy ideas that my staff and I call upon regularly."

**— ASSEMBLYMEMBER JESSE GABRIEL,
ASSEMBLY BUDGET CHAIR**

In recognition of the need for more evidence-based applied research in the field of affordable housing, the Partnership significantly expanded its capacity to do applied research to inform the creation of new policies and program, often in partnership with academic and nonprofit partners. To help policymakers understand the depth of the affordable housing crisis in all parts of the California and the need to increase investment in affordable housing, the Partnership expanded the number of easy-to-understand housing need reports annually at the state and county level. We also began publishing research and policy recommendations related to new laws promoting the development of affordable family housing in communities of opportunity as well as increased protections for low-income people of color against displacement.



In the past five years, we sponsored state legislation that led to important affordable housing policy changes including:

- **AB 434** (2020) streamlined the allocation of nearly a dozen state funding programs administered by the state Department of Housing & Community Development (HCD).
- **AB 84** (2023) improved access to the state welfare property tax exemption for nonprofit housing organizations.
- **AB 346** (2023) increased the amount of private investment generated by the sale of state housing credits by \$42 million annually by clarifying when investors may start claiming the credits.
- **AB 1449 & 1633** (2023) further protected affordable housing from improper application of the California Environmental Quality Act (CEQA).
- **AB 2006** (2022) streamlined the compliance monitoring of affordable housing when more than one state housing agency has provided financing.
- **SB 469** (2023) exempted state-funded affordable housing from Article 34, relieving it from the threat of triggering a public referendum.
- **SB 948** (2022) significantly reduced the cost of affordable housing through the creation of a pooled transition reserve to insure against loss of rental subsidy.
- **AB 482** (2023) ensured that permanent supportive housing has access to critical operating subsidies through the Multifamily Housing Program.



BUILDING CAPACITY AND TECHNICAL EXPERTISE FROM THE INSIDE, OUT

"The California Housing Partnership team is a critical resource for HCD and other state housing agencies in providing input on how to make our programs better and more workable for the end users."

– GUSTAVO VELASQUEZ, DIRECTOR, CALIFORNIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (HCD)

The last five years invited the Partnership to expand and evolve. In recognition of the increasing requests for the Partnership to weigh in on policy matters, we created a new Advocacy team that now consists of two full-time lobbyists directed by the CEO and supported by the Communications Manager. The Partnership is now a staff of 44, a 50 percent increase in five years. Across Research, Sustainability, and Finance, our organization has been graced with ever more talented practitioners with rich varieties of experiences spanning policy, real estate, research, sciences, and community development.

The **Finance** team now stands at 25 professionals, a 50 percent increase in five years, allowing us to assist on a record number of funding applications for HCD's inaugural Multifamily Finance SuperNOFA in 2022. Since 2019, we have helped our partners leverage \$11.7 billion in public and private funds to produce and preserve more than 21,000 housing units for nearly 60,000 low-income residents across the state and trained more than 16,000 professionals in affordable housing finance and development.

The Partnership is well into its third decade as the lead trainer for the Local Initiatives Support Corporation (LISC) flagship **California Housing Development Training Institute (HDTI)**. The intensive year-long training program for new project managers transitioned from a historically in-person experience to an entirely virtual one, enabling participation from multiple Partnership departments.

The **Sustainability** team has more doubled in size and now has a dedicated policy professional embedded in the **Advocacy** team, allowing for more programmatic and legislative improvements for clean energy programs and funds aimed at affordable housing.

Our **Research** team expanded to six people and formed new partnerships with the Urban Institute and academic institutions at UC Berkeley and UCLA as well as the range of issues we address to include displacement of low-income renters and affirmatively furthering fair housing.



Rachael Diaz, Sustainable Housing Program Manager, celebrating SOMAH's first tribal property installation with partners Bishop Paiute Tribe & GRID Alternatives. Photo Courtesy of GRID Alternatives.

EXPANDING THE FOOTPRINT FOR SUSTAINABLE AND AFFORDABLE HOUSING



1 Brooklyn Basin, Oakland

Waterfront mixed-use & mixed-income district housing the Bay's vulnerable families & seniors

Developer: MidPen Housing

Homes: 465 (341 complete, remainder under construction)

AMI: 30%–60% AMI

Populations Served: Seniors, families, formerly homeless

Financing: \$344.1 million (\$234.6 million complete, remainder under construction)

Amenities: Creative retail, parks, and open spaces along 64 acres of waterfront

Opened: 2020–2024



Paseo Estero in Brooklyn Basin Oakland, Photo by David Wakely, Courtesy of MidPen Housing



Halcyon Collective Arroyo Grande. Photo by RRM Design, Courtesy of Housing Authority of San Luis Obispo (HASLO)

2 Halcyon Collective, Arroyo Grande

Small town family living on the Central Coast

Developer: Housing Authority of San Luis Obispo

Homes: 20

AMI: 30%–50% AMI

Population Served: Families

Financing: \$7.3 million

Amenities: Short drive to Pismo Beach, walking distance to schools, dining, retail, hospital

Opened: July 2020

3 Maceo May, Treasure Island

Six-story modular build in the Bay housing formerly homeless veterans & their families

Developer: Chinatown Community Development Corporation & Swords to Plowshares for Veterans

Homes: 105

AMI: 30%–60% AMI

Population Served: Veterans

Financing: \$101.4 million

Amenities: Common outdoor areas, a forested healing garden, a playground, and a roof deck

Opened: March 2023



Maceo May Treasure Island, Photo by Bruce Damonte, Courtesy of Swords to Plowshares for Veterans

4 Wilton Court, Palo Alto

Palo Alto's first affordable housing development in a decade

Developer: Alta Housing

Homes: 59

AMI: 30%–60% AMI

Population Served: Adults with intellectual and/or developmental disabilities

Financing: \$48 million

Amenities: Podium garden area, health & wellness programs, transit-friendly El Camino Real location

Opened: November 2022



Wilton Court Palo Alto. Photo by David Wakely, Courtesy of Alta Housing.



St. Clare at Capitol Park. Photo Courtesy of Mercy Housing

5 St. Clare at Capitol Park, Sacramento

Adaptive reuse and rehabilitation of downtown Sacramento historic hotel

Developer: Mercy Housing

Homes: 134

AMI: 20%–40% AMI

Population Served: formerly homeless individuals

Financing: \$76 million

Amenities: Community space with kitchen, On-site services, ground floor commercial

Opened: January 2024

6 Casa Anita, Chula Vista

Affordable homes serving San Diego's South Bay region

Developer: Wakeland Housing & Development Corporation

Homes: 96

AMI: 20%–60% AMI

Population Served: Families & formerly homeless

Financing: \$42.6 million

Amenities: Clubhouse, picnic area with barbecue, easy access to entertainment & retail

Opened: December 2022



Casa Anita Chula Vista. Photo by Bob Ross, Courtesy of Wakeland Housing & Development Corporation



Photo Courtesy of LINC Housing

7 HiFi Collective, Los Angeles

Community-based developer collaboration in Historic Filipinotown

Developers: LINC Housing

Homes: 64

AMI: 30% AMI supportive housing

Population Served: Formerly homeless

Financing: \$34.9 million

Amenities: Commercial space for SIPA (Search to Involve Pilipino Americans), community room with kitchen, outdoor courtyards

Opened: May 2022

8 Villages at Westview, San Buenaventura

Ventura's first new construction public housing property

Developers: BRIDGE Housing & Housing Authority of the City of San Buenaventura

Homes: 320 (230 complete, remainder under construction)

AMI: 30%–60% AMI

Population Served: Families & seniors

Financing: \$176.9 million (\$141.1 million complete, remainder under construction)

Amenities: Community rooms, public park & picnic areas

Opened: March 2019 & November 2022



Photo Courtesy of Housing Authority of the City of San Buenaventura (HACSB)

FUNDING SOURCES

HCD AHSC, HCD IIG, HHH, LA County NPLH, Bank of America, Raymond James, Citibank, HACSB, City of Ventura HOME, Freddie Mac Bellwether, JP Morgan Chase, Enterprise, CIT, City of Chula Vista, County of San Diego Innovative Housing Trust Fund and No Place Like Home funding, Wells Fargo, California Community Reinvestment Corporation, Alameda County, HCD NPLH, Century Housing, City of Oakland, California Housing Accelerator Program, Pacific Western Bank, Housing Authority of San Luis Obispo, Riverside Capital, City of San Francisco MOHCD, VHHP, NEF, Home Depot Foundation, AHP, MetLife Foundation, Northrop Grumman, Raymond James, Silicon Valley Bank, Treasure Island Development Authority, CA & US Department of Veterans Affairs, City of Palo Alto, CMFA, County of Santa Clara, CalHFA, Sacramento Housing & Redevelopment Agency, US Bank, County of Ventura

PARTNERS

NONPROFIT HOUSING ORGANIZATIONS

A Community of Friends
Abode Communities
Allied Housing
Alta Housing
ASIAN Inc.
BRIDGE Housing
Bold Communities
Brilliant Corners
Burbank Housing Corp.
Cabrillo Economic Development Corp.
Century Housing
Charities Housing
Chinatown Community Development Center
Christian Church Homes Community Corp. of Santa Monica
Community Housing Development Corp. of North Richmond
Community Housing Improvement Program
Community HousingWorks Corporation for Supportive Housing
COVIA
DECRO
Dry Creek Rancheria Band of Pomo Indians
EAH Housing
East Bay Asian Local Development Corp.

East LA Community Corp.
Eden Housing
Enterprise Community Partners
Father Joe's Villages
First Community Housing
HIP Housing
HOLOS Communities
Hollywood Community Housing
HomeRise
HOPE Cooperative
Housing Development Partners
Housing Innovation Partners
Housing Trust Silicon Valley
Innovative Housing Opportunities
Jamboree Housing
LA Family Housing
LA LGBT Center
LINC Housing
Little Tokyo Service Center
Local Initiatives Support Corp.
Los Angeles Housing Partnership
MAAC Project
Mammoth Lakes Housing
Many Mansions
Menorah Housing Foundation
Mercy Housing California
MidPen Housing
Mission Economic Dev. Agency
Mission Housing

Mutual Housing California
Napa Valley Community Housing
Neighborhood Partnership Housing Services
PATH Ventures
PEP Housing
Penny Lane Centers / Abbey Road
People's Self-Help Housing
Resources for Community Development
SRO Housing Corporation
San Diego Community Housing Corp.
San Francisco Housing Development Corp.
Satellite Affordable Housing Associates
Self-Help Enterprises
Skid Row Housing Trust
The Unity Council
Tenderloin Neighborhood Development Corp.
Venice Community Housing
Visionary Home Builders
Volunteers of America
Wakeland Housing & Development Corp.
West Hollywood Community Housing

THINK TANKS & ACADEMIA

UC Berkeley
Center for Law, Energy, & the Environment

Institute for Urban & Regional Development
Othering and Belonging Institute
Terner Center for Housing Innovation
Urban Displacement Project
UC Davis School of Law
UC Irvine
UCLA
California Policy Lab
Lewis Center for Regional Policy Studies
Luskin School of Public Affairs
USC
Center for Social Innovation
Population Dynamics Research Group
Urban Institute

SUSTAINABILITY ORGANIZATIONS

Association for Energy Affordability
California Environmental Justice Alliance
Center for Sustainable Energy
Enterprise Community Partners
GRID Alternatives
Greenlining Institute
Natural Resources Defense Council
National CORE
Rocky Mountain Institute

GOVERNMENT AGENCIES

Alameda Housing Authority
Berkeley Housing Authority
California Department of Housing & Community Development
California Energy Commission
California Housing Finance Agency
California Public Utilities Commission
City of Los Angeles Housing Department
California Department of Community Services and Development
Fresno Housing Authority
Housing Authority of the City of San Buenaventura
Housing Authority of the City of Los Angeles
Housing Authority of San Luis Obispo
Los Angeles County Chief Executive Office
Los Angeles County Development Authority
Los Angeles Department of Water and Power
Metropolitan Transportation Commission
Oakland Housing Authority
Sacramento Housing & Redev Agency
San Diego Housing Commission

San Jose Housing Department
Santa Clara County Housing Authority
Santa Cruz County Housing Authority
San Francisco Mayor's Office of Housing
San Joaquin Housing Collaborative
Sutter County Housing Authority
Ventura County Housing Authority

REGIONAL & STATE ASSOCIATIONS

All Home
Black Developers Forum
California Coalition for Rural Housing
California Housing Consortium
East Bay Housing Organizations
Housing California
Housing Now
San Mateo County Housing Leadership Council
Kennedy Commission
National Housing Law Project
Non-Profit Housing Association of Northern California
PICO California
Sacramento Housing Alliance
The Angeleno Project
San Diego Housing Federation

San Joaquin Valley Housing Partnership
Silicon Valley @Home
Southern California Association of Non-Profit Housing

FUNDERS

Bank of America Foundation
Bank of the West Foundation
Battery Powered
California Community Foundation
Chan Zuckerberg Initiative
Citibank Foundation
First Republic Bank Foundation
Irvine Foundation
JP Morgan Chase Foundation
JPB Foundation
Merritt Community Capital
Meta
Movement Strategy Center
National Low Income Housing Coalition
The San Francisco Foundation
Silicon Valley Community Foundation
Sunlight Giving
US Bank (& Union Bank) Foundation
Wells Fargo Foundation

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