San Diego Regional Housing Finance Authority (SD RHFA)

NOTICE AND AGENDA OF PUBLIC MEETING

To: Those San Diego radio stations, television stations, digital media, and newspapers of general circulation that have requested notice in writing of meetings.

Pursuant to the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5), please take notice that a public meeting of the San Diego Regional Housing Finance Authority is scheduled for:

Wednesday, January 28, 2026 at 1:00 p.m.
San Diego Unified School District (SDUSD)
4100 Normal Street
San Diego, CA 92103

Board Member Richard Barrera will be attending virtually from the following location:

8466 S. Figueora St., Los Angeles, CA 90003

AGENDA:

1. Welcome and Call to Order
2. Non-agenda Public Comment
3. Consent Agenda
    a. Approve November 19, 2025, Meeting Minutes
4. Informational Items
    a. Report on Budget Spend-down (July-December 2025)
5. Action Items
    a. Approve 2026 Board Meeting Calendar
    b. Accept Prebys donation
    c. Approve 2026 Organizational Budget
    d. Approve 2026 GPLA Contract Amendment
    e. Approve SD-RHFA Conflict of Interest (COI) Policy
    f. Approve KNN Contract
6. Presentations
    a. Advisory Committee Update – Results of Board Survey (per SB 440)
    b. SD-RHFA 2026 Workplan
7. Meeting Adjournment
    a. TBD (San Diego Community College District)

All exhibits are available for inspection by the public at the SD RHFA meeting or prior to such meeting, when reports are available. Contact the Board Services Office at (619) 725-5550 for more information.

Reasonable accommodation for any individual with a disability - Any individual with a disability who requires reasonable accommodation to participate in this meeting may request assistance 24 hours prior to the scheduled meeting by contacting the Board Services Office at (619) 725-5550.

San Diego Regional Housing Finance Authority

Meeting Minutes
November 19, 2025

The meeting of the San Diego Regional Housing Finance Authority (SD-RHFA) was held on November 19, 2025, at 1:00 p.m. at the San Diego Community College District, 3375 Camino del Rio South, San Diego, CA 92103.

Participants:

- San Diego Unified School District (SDUSD) Trustee Cody Petterson
  - **Absent**: Richard Barrera
- San Diego Community College District (SDCCD) Trustees Craig Milgrim, Mariah Jameson
- San Diego Unified School District (SDUSD) Superintendent Fabiola Bagula
- San Diego Community College District (SDCCD) Chancellor Gregory Smith
- San Diego Unified School District (SDUSD) Interim General Counsel Andra M. Greene (virtual)

A. Call to Order at 1:10pm
B. Non-agenda Public Comment (3 minutes per speaker)
    a. None
C. Consent Agenda
    a. Approve October 29, 2025 Meeting Minutes
        i. Approval pending addition of "interim" for General Counsel
        ii. Motion by Trustee Mariah Jameson, seconded by Trustee Craig Milgrim, to approve the minutes with the noted correction. Motion passed unanimously.
D. Informational Items
    a. Report on Budget Spend-down (July-December 2025)
E. Action Items
    a. Approve Transitional Strategic Framework (1 vote)
        i. Motion by Trustee Mariah Jameson, seconded by Trustee Craig Milgrim, to approve the Transitional Strategic Framework. Motion passed unanimously.
            1. **Core Values**
                a. Community Focus: We center equity, dignity, and lived experience to ensure housing systems reflect the needs of those most impacted.
                b. Governance & Accountability: We build public trust by practicing transparency, demonstrating responsible stewardship, and making ethical decisions.
                c. Operational Excellence: We act boldly and persistently to deliver measurable housing results.

d. Innovation & Resilience: We embrace new solutions and ensure they endure overtime.
e. Regional Impact: We connect housing to education, health, and community well-being to transform the San Diego region.

2. Mission Statement

a. Build and preserve housing near jobs, schools, and transit so San Diegans can live in communities where they work and thrive.

3. Vision Statement

a. A San Diego where every resident has a quality, affordable home close to current and future opportunities.

4. Goals

a. Housing Production & Preservation: Preserve and increase affordable homes near jobs, schools, and services.
b. Sustainability & Generational Impact: Create sustainable housing solutions that protect today's residents and future generations.
c. Community & Systems Impact: Align housing, education, and transportation investments to strengthen neighborhoods and reduce displacement.

b. Approve 2026 Organizational Budget (January-December 2026)
    i. Motion by Trustee Craig Milgrim, seconded by Trustee Mariah Jameson, to approve the 2026 Organizational Budget (January-December 2026). Motion passed unanimously.
c. Approve 2026 Board Meeting Calendar
    i. Motion by Trustee Mariah Jameson, seconded by Trustee Craig Milgrim, to approve the scheduling of the January meeting, set for Wednesday, January 28, 2026 from 1:00-3:00pm at San Diego Unified School District (4100 Normal Street, San Diego, CA 92103). Motion passed unanimously.

F. Presentations (no vote)
    a. Advisory Board Overview (per SB 440). Public comment received by Raoul Amescua/The Michaels Organization.
G. Meeting Adjournment
    a. Meeting adjourned at 3:02pm.

b. Next Meeting: Wednesday, January 28 from 1-3pm at San Diego Unified School District (4100 Normal Street, San Diego, CA 92103).

SD Regional Housing Finance Authority Program Budget (July 1, 2025 - December 31, 2025)

Budget Summary (at a glance)

Category	Amount/Percentage
Total Budget	$ 250,000
Total Spent	$ 192,876 ~~205,083~~
Remaining	$ 57,124 ~~44,917~~
% of Budget Spent	77% ~~82%~~

Income

#	Sources	In-kind	Contractual		Total
1	Prebys Grant for RHFA work		$ 250,000		$ 250,000
2	In-Kind Resources	$ 162,500			$ 162,500
	Total	**$ 162,500**	**$ 250,000**		**$ 412,500**

Expenditures

#	Expense Items	In-kind	Contractual	November Reallocation Requests	Revised Budget	INVOICE #1 - paid: Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	No invoice: Withhold by Fiscal Agent	INVOICE #2 - paid: Nov-25	Dec-25	INVOICE #3	~~Jan-26~~	Spent to Date	Remaining Balance	% Spent
1	**Contracted Board and Organizational Support**		$ 175,000		$ 175,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000		$ 25,000	$ 25,000			$ 175,000	$ -	100%
2	**Legal Counsel and Meeting Support -** SD Unified	$ 105,000	n/a		$ -											$ -	$ -	
3	**Legal Counsel and Meeting Support -** Outside Municipal Counsel		$ 30,000		$ 30,000											$ -	$ 30,000	0%
4	**Formation and Incorporation Costs**	$ 40,000	n/a		$ -											$ -	$ -	
5	**Accounting/Fiscal Sponsorship (SDCCD)**	$ 17,500	$ 7,500		$ 7,500						$ 7,500					$ 7,500	$ -	100%
6	**Insurance**		TBD	$ 4,953	$ 4,953							$ 4,953			$ (170)	$ 4,953 ~~4,783~~	~~170~~	100% ~~97%~~
7	**IT Services**	TBD			$ -							GC will send invoice; GPLA will pay			GPLA paid invoice based on actual amount provided ($4,783)	$ -	$ -	
8	**Website Launch/Hosting/Graphic Design**		TBD	$ 11,000	$ 11,000										$ ~~11,000~~	$ ~~11,000~~	$ 11,000	0% ~~100%~~
9	**Meeting costs**		$ 1,800	$ -	$ 1,800					$ 1,800		$ (1,377)			$ ~~1,377~~	$ ~~423~~ 1,800	$ 1,377 (0)	24% ~~100%~~
10	**Travel & Training**		$ 5,000		$ 5,000				$ -	$ 5,000		Staff time inadvertently charged to this category				$ 5,000	$ -	100%
11	**Start-Up expenses**		$ 11,000	$ (11,000)	$ -							Overbilled this accidentally				$ -	$ -	
12	**Contingency (for Misc. items, etc.)**		$ 19,700	$ (4,953)	$ 14,747											$ -	$ 14,747	0%
	Total	**$ 162,500**	**$ 250,000**	**$ -**	**$ 250,000**	**$ 25,000**	**$ 25,000**	**$ 25,000**	**$ 25,000**	**$ 31,800**	**$ 7,500**	**$ 28,576**	**$ 25,000**		**$ ~~12,207~~**	**$ 192,876 ~~205,083~~**	**$ 57,124 ~~44,917~~**	**77% ~~82%~~**
									INVOICE #1	**$ 131,800**		**INVOICE #2**	**$ 53,576**	**INVOICE #3**	**$ ~~12,207~~**			

***N/A denotes an "in-kind" resource or a "placeholder" item**

San Diego Regional Housing Finance Authority (SD-RHFA)
2026 Board Meeting Schedule

Pending Board Approval

Board Members: Cody Petterson (SD Unified), Richard Barrera (SD Unified), Fabi Bagula (SD Unified, Ex-officio), Craig Milgrim (SDCCD), Mariah Jameson (SDCCD), Greg Smith (SDCCD, Ex-officio)

The table below is the proposed meeting calendar for the San Diego Regional Housing Finance Authority (SD RHFA) Board for CY 2026.

Month	Date	Time	Location
January	January 28, 2026	1:00–3:00 p.m.	San Diego Unified
February	February 17, 2026	3:00-5:00 p.m.	San Diego Community College
March	March 17, 2026	3:00-5:00 p.m.	San Diego Unified
April	April 21, 2026	3:00-5:00 p.m.	San Diego Community College
May	May 19, 2026	3:00-5:00 p.m.	San Diego Unified
June	June 16, 2026	3:00-5:00 p.m.	San Diego Community College
July	July 21, 2026	3:00-5:00 p.m.	San Diego Unified
August	August 18, 2026	3:00-5:00 p.m.	San Diego Community College
September	September 22, 2026	3:00-5:00 p.m.	San Diego Unified
October	October 12, 2026	3:00-5:00 p.m.	San Diego Community College
November	November 10, 2026	3:00-5:00 p.m.	San Diego Unified
December	No meeting	N/A	N/A

San Diego Community College District (SDCCD) Location:
San Diego Community College District
3375 Camino del Rio South
San Diego, CA 92108

Parking:
Please feel free to park in any unassigned space, either in front of the building or in one of the parking lots directly behind the building. To access the back lot, turn South on Scheidler Way, (immediately east of the building), then turn right into the first lot behind the building (there will be a disabled sign at the entrance). You may also park in the lot further up the hill if there are no available spaces. A parking permit is not required. Chancellor's Conference Room is located on the third floor in Suite 300.

San Diego Regional Housing Finance Authority (SD-RHFA)
2026 Board Meeting Schedule

San Diego Unified School District (SDUSD) Location:

San Diego Unified School District
4100 Normal Street
San Diego, CA 92103

Parking:

Visitor parking is available on the front lawn (near the flagpole) on Normal Street.

SAN DIEGO REGIONAL HOUSING FINANCE AUTHORITY
SAN DIEGO, CALIFORNIA

In the Matter of Acceptance of Donation from Prebys Foundation	**)** **)**	**Resolution**

WHEREAS, the San Diego Regional Housing Finance Authority ("Authority") is a regional housing finance authority created pursuant to SB 440 (2023; Skinner) with all of the powers and duties provided for therein: and

WHEREAS, among those powers, the Authority is vested with the authority to accept grants from public and private entities;

WHEREAS, the Prebys Foundation has offered and the Authority desires to accept a donation of $250,000 to be used by the Authority for operating expenses;

NOW, THEREFORE, BE IT RESOLVED, that Authority hereby accepts the aforementioned donation from the Prebys Foundation, which it will use for its operating expenses in accordance with its adopted budget.

PASSED AND ADOPTED by the governing Board of the San Diego Regional Housing Finance Authority, a public meeting held the 28th day of January 2026 by the following vote:

AYES:
NAYS:
ABSENT:
ABSTAIN:

oOo

STATE OF CALIFORNIA)
COUNTY OF SAN DIEGO)

I, Andra M. Greene, Interim General Counsel, San Diego Regional Housing Finance Authority do hereby certify that the foregoing is a full, true and correct copy of a resolution adopted by said board at a meeting thereof held on the day and by the vote above stated, which resolution is on file with the minutes of said meeting.

_____

**** DRAFT for SD-RHFA board approval ****

SD Regional Housing Finance Authority Program Budget (January 1, 2026 - June 30, 2026)

Budget Summary (at a glance)

Category	Colu	Amount/Percentage
Total Budget	$	307,124
Total Spent / Forecasted	**$**	**307,124**
Remaining	$	-
% of Budget Spent		**100%**

#	Sources	In-kind	2026 Budget
1	Prebys Grant for 2026 RHFA work		$ 250,000
2	Carry-over from 2025		$ 57,124
3	Funds to be raised		
4	In-kind if applicable		
	Total	**$ -**	**$ 307,124**

Forecast Expenditure Schedule

Draw Down Party	#	Expense Items	In-kind	Carry-Over from 2025	Prebys Funds	Total 2026 Budget	To be Raised	2026 Reallocation Requests	Revised Budget	Withholding of Fiscal Agent Fee	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Spent / Forecasted to Date	Remaining Balance	% Spent
GPLA	1	**Contracted Board and Organizational Support - Q1, Q2 Only**			$ 150,000	$ 150,000			$ 150,000		$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000							$ 150,000	$ -	100%
GPLA	2	**Allowance for Advisory Board outreach events; assistance**			$ 8,500	$ 8,500			$ 8,500			$ 4,250	$ 4,250										$ 8,500		
GPLA	3	**Website Launch/Hosting/Graphic Design (to .gov standards)**		$ 11,000	$ 49,000	$ 60,000			$ 60,000			$ 30,000	$ 30,000										$ 60,000	$ -	100%
GPLA	4	**Meeting costs (food, etc)**		$ 1,377	$ -	$ 1,377			$ 1,377		$ 230	$ 230	$ 230	$ 230	$ 230	$ 230							$ 1,377	$ -	100%
GPLA	5	**Contingency (for Misc. items, etc.)**		$ 14,747		$ 14,747			$ 14,747			$ 2,949	$ 2,949	$ 2,949	$ 2,949	$ 2,949							$ 14,747	$ -	100%
GPLA	6	**Travel & Training 15 people @ $2K each (includes advisory board)**			$ 30,000	$ 30,000			$ 30,000							$ 30,000					$ -		$ 30,000	$ -	100%
Fiscal Agent	7	**Fiscal Sponsorship @ 3% (SDCCD)**			$ 7,500	$ 7,500			$ 7,500	$ 7,500													$ 7,500		
SDRHFA	8	**Insurance**			$ 5,000	$ 5,000			$ 5,000							$ 5,000							$ 5,000	$ -	100%
SDRHFA	9	**Financial Consulting**		$ 25,000		$ 25,000			$ 25,000			$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000							$ 25,000	$ -	100%
SDRHFA	10	**Legal Counsel and Meeting Support -** SD Unified	tbd			$ -			$ -														$ -	$ -	#DIV/0!
SDRHFA	11	**Formation and Incorporation Costs**	tbd		n/a	$ -			$ -														$ -	$ -	#DIV/0!
SDRHFA	12	**Accounting**	tbd			$ -			$ -														$ -	$ -	#DIV/0!
SDRHFA	13	**Misc**		$ 5,000		$ 5,000			$ 5,000			$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000							$ 5,000	$ -	100%
		Total	**$ -**	**$ 57,124**	**$ 250,000**	**$ 307,124**	**$ -**	**$ -**	**$ 307,124**	**$ 7,500**	**$ 25,230**	**$ 68,429**	**$ 68,429**	**$ 34,179**	**$ 34,179**	**$ 69,179**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 307,124**	**$ -**	**100%**

Draws by Team Member	Withholding of Fiscal Agent Fee	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Total
GPLA	$ -	$ 25,230	$ 62,429	$ 62,429	$ 28,179	$ 28,179	$ 58,179	$ -	$ -	$ -	$ -	$ -	$ -	$ 264,624
Fiscal Agent	$ 7,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 7,500
SDRHFA	$ -	$ -	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 11,000	$ -	$ -	$ -	$ -	$ -	$ -	$ 35,000
Total Draw	**$ 7,500**	**$ 25,230**	**$ 68,429**	**$ 68,429**	**$ 34,179**	**$ 34,179**	**$ 69,179**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 307,124**

Draw Schedule	Qtr Budget	Less: Fiscal Agent Fee	Less: budget line items for SDRHFA to draw down	GPLA draw down from New & Carry-Over Funds
Q1 - January	$ 169,587	$ 7,500	$ 10,000	**$ 152,087**
Q2 - March	$ 137,537	$ -	$ 20,000	**$ 117,537**
Q3	$ -		$ -	
Totals	**$ 307,124**	**$ 7,500**	**$ 30,000**	**$ 269,624**

GLOBAL POLICY
LEADERSHIP ACADEMY

The Agreement dated August 22, 2025 between San Diego Regional Housing Finance Authority, a California organization, having its principal place of business at 4100 Normal Street, San Diego, CA 92103 (referred to herein as "Client") and Global Policy Leadership Academy, a California corporation, having its principal place of business at 845 15th Street, Suite 103, San Diego, CA 92101 (referred to herein as "Consultant") ("Agreement") is hereby amended as follows:

1. Term. The term of the Agreement shall be extended through and including June 30, 2026 unless terminated in accordance with the provisions of Article 10 of the agreement.

2. Exhibit A ("Scope of Services") is replaced with the Scope of Services attached as Exhibit A to this Amendment.

3. Article 4. Compensation is deleted and replaced with the following: Consultant may draw up to $264,624 for services and reimbursable costs incurred as set for in the Scope of Work (Exhibit A) and the Budget (Exhibit B).

Except as provided herein, the remaining terms of the contract shall remain in full force and effect.

Approved by the Governing Board of the San Diego Regional Housing Finance Authority on January 28, 2026.

Date: _____	Date: _____
Andra M. Greene Interim General Counsel San Diego Regional Housing Finance Authority	Richard Valdez Chief Operations Officer Global Policy Leadership Academy

EXHIBIT A

2026 SCOPE OF SERVICES – January 1, 2026 through June 30, 2026

Overview

This contract provides for strategic consulting, facilitation, coordination, and technical services to be provided to the SD-RHFA by the Global Policy Leadership Academy (GPLA), to advance the operational framework of the San Diego Regional Housing Finance Authority (SD-RHFA). GPLA's scope of work aligns with the 2025-2026 SD-RHFA Workplan and will focus on three core areas described below:

1. Governance and Administration
   - Support the design and facilitation of SD-RHFA Board meetings
   - Draft charters, governance protocols, and internal decision-making frameworks in consultation with legal counsel
   - Support legal counsel in aligning governance structure with Brown Act requirements
   - Develop and track Board deliverables and timelines
   - Coordinate with public agency partners on Board participation and alignment
   - Assist with fundraising for operations
   - Maintain the official records of the SD-RHFA

2. Housing Learning and Capacity
   - Develop and execute learning sessions focused on topics determined by the SD-RHFA Board
   - Curate external speakers, case studies, and materials relevant to SD-RHFA objectives
   - Facilitate partner and Board discussions that connect local priorities to best practices
   - Summarize and synthesize learnings into actionable outputs (e.g., memos, recommendations)

3. Execution Strategy & Program Planning
   - Assist with the development and implementation of SD-RHFA program strategies
   - Develop timelines and infrastructure needs to support launch of SD-RHFA activities including management of third-party deliverables (e.g., website design, IT services, etc.)
   - Prepare summary materials for public communication and funder alignment

4. Deliverables
   - Board agenda-building and meeting support, including facilitation, document management, and strategic support
   - Development of Board charter templates and governance materials, in consultation with Board Counsel

- Creation and implementation of SD-RHFA workplan
- Continuing development and implementation of SD-RHFA workplans
- Ongoing project management and coordination across stakeholders including management of third-party deliverables (e.g., website design, IT services, etc.)
- Final summary report and recommendations for Q1 2027

5. Assumptions
   - GPLA will prepare and send the draft SDRHFA Board meeting package that includes the agendas (categorized by type e.g., action, information, consent, etc.) and related attachments to the agenda (e.g., presentations, reports etc.) to San Diego Unified School District (SDUSD) and San Diego Community College District (SDCCD) staff for review approximately one week prior to the required public notice of the Board hearing. GPLA will collaborate with SDCCD and SDUSD staff to help determine the order of agenda items, estimate time needed per item, and work with staff to finalize the Board package as needed.
   - SDCCD and SDUSD staff will post the final Board meeting agenda at least 72 hours in advance of Board meetings.
   - SDCCD and SDUSD staff will prepare printed Board packets materials, test AV equipment, set up hybrid or in-person logistics, record meetings (as needed), and configure the room etc. for Board meetings. SDCCD will take the lead on this when meetings are held at SDCCD. SDUSD will take the lead on this when meetings are held at SDUSD.
   - During the day of a Board hearing, GPLA will provide light refreshments (water, soda, snacks etc.) for up to 12 people, as needed.
   - GPLA to document meeting minutes (log votes, public comment, and Board directives) in real time. GPLA will keep a record of official SD-RHFA files.
   - GPLA to archive meeting videos (if available, provided by SDCCD and/or SDUSD), Board packets, and other pertinent information on the SD-RHFA website once the website is launched.
   - GPLA to be responsible for website management once created.

EXHIBIT B

** DRAFT for SD-RHFA board approval **

SD Regional Housing Finance Authority Program Budget (January 1, 2026 - June 30, 2026)

Budget Summary (at a glance)

Category	Colu	Amount/Percentage
Total Budget	$	307,124
Total Spent / Forecasted	**$**	**307,124**
Remaining	$	-
% of Budget Spent		**100%**

#	Sources	In-kind	2026 Budget
1	Prebys Grant for 2026 RHFA work		$ 250,000
2	Carry-over from 2025		$ 57,124
3	Funds to be raised		
4	In-kind if applicable		
	Total	**$ -**	**$ 307,124**

Draw Down Party	#	Expense Items	In-kind	Carry-Over from 2025	Prebys Funds	Total 2026 Budget
GPLA	1	**Contracted Board and Organizational Support - Q1, Q2 Only**			$ 150,000	$ 150,000
GPLA	2	**Allowance for Advisory Board outreach events; assistance**			$ 8,500	$ 8,500
GPLA	3	**Website Launch/Hosting/Graphic Design (to .gov standards)**		$ 11,000	$ 49,000	$ 60,000
GPLA	4	**Meeting costs (food, etc)**		$ 1,377	$ -	$ 1,377
GPLA	5	**Contingency (for Misc. items, etc.)**		$ 14,747		$ 14,747
GPLA	6	**Travel & Training 15 people @ $2K each (includes advisory board)**			$ 30,000	$ 30,000
Fiscal Agent	7	**Fiscal Sponsorship @ 3% (SDCCD)**			$ 7,500	$ 7,500
SDRHFA	8	**Insurance**			$ 5,000	$ 5,000
SDRHFA	9	**Financial Consulting**		$ 25,000		$ 25,000
SDRHFA	10	**Legal Counsel and Meeting Support -** SD Unified	tbd			$ -
SDRHFA	11	**Formation and Incorporation Costs**	tbd		n/a	$ -
SDRHFA	12	**Accounting**	tbd			$ -
SDRHFA	13	**Misc**		$ 5,000		$ 5,000
		Total	**$ -**	**$ 57,124**	**$ 250,000**	**$ 307,124**

San Diego Regional Housing Finance Authority (SD-RHFA)

CONFLICT OF INTEREST CODE

Purpose

The purpose of this regulation is to outline what is required for compliance with the "conflict of interest/disclosure provision" of the Political Reform Act of 1974.

The conflict of interest provisions set forth in Chapter 7 of the California Political Reform Act of 1974 ("Political Reform Act" or "the Act") prohibit any public officer or employee from making, participating in making, or influencing any agency decision in which he/she has a financial interest. The Act also requires that certain officers and employees of the agency disclose their financial interests. The SD-RHFA is required to adopt a conflict of interest code that has the force of law and contains the following provisions:

1. A designation of those positions within the agency which involve the making of or participation in the making of decisions that may foreseeably have a material effect on the financial interests of the person holding the position;

2. For each such position, the specific types of investments, business positions, interests in real property and sources of income which must be disclosed; and

3. The circumstances under which a Designated Employee must disqualify themself from making or participating in the making of any decision that may foreseeably have a material effect on the financial interest of the person holding the position.

Penalties for Violation of Code

This Conflict of Interest Code has the force of law. Any violation hereof may constitute a misdemeanor, with specified penalties depending on the nature of the infraction.

All provisions of the Political Reform Act of 1974, regulations of the Fair Political Practices Commission, specifically 2 California Code of Regulations Section 18730, and any amendments to the Act or regulations are hereby incorporated by reference into this Conflict of Interest Code.

Definitions

1. Designated Positions and Designated Employees: Those people holding positions listed in Exhibit (1) are Designated Employees. These are people who make or participate in the making of decisions that may foreseeably have a material effect on financial interests.

2. Disclosure Categories: The disclosure categories set forth in Exhibit (1) specify which kinds of financial interests are reportable by a Designated Employee. Each Designated Employee is required to disclose in his or her statement of economic interests those financial interests he or she has which are of the kind described in the disclosure categories to which he or she is assigned. The financial interests set forth in a designated employee's disclosure categories are the kinds of financial interests that he/she foreseeably can affect materially through the conduct of his/her office.

3. The definitions contained in the Political Reform Act of 1974, regulations of the Fair Political Practices Commission, and any amendments thereto, are incorporated by reference into this Conflict of Interest Code unless modified herein.

Responsibilities

1. Designated Employees shall file disclosure statements and disqualify themselves from making decisions in accordance with the information below.

2. The Governing Board of SD-RHFA shall determine which positions shall be required to file statements of economic interests.

3. The Governing Board of SD-RHFA shall also determine whether a consultant or committee member will be required, depending on the nature of the assignment, to file a statement of economic interests. Members of permanent committees shall be included in the list of Designated Positions (Exhibit 1).

Place of Filing Statements of Economic Interests

Designated Employees shall file a statement of economic interests electronically with the San Diego County Board of Supervisors through the eDisclosure portal. A copy shall be retained in the official records of the SD-RHFA. Its legal counsel shall be responsible for follow-up to ensure compliance with filing requirements.

Time of Filing and Contents of Statements of Economic Interests

1. Initial Statements: Designated Employees shall file initial statements within 30 days of adoption of this Conflict of Interest Code.

2. Assuming Office Statements: Designated Employees who assume office after the adoption of this Conflict of Interest Code shall file a statement within 30 days of assuming office, except for a person who assumes a position within 30 days of leaving another agency for which they filed a statement. Statements shall disclose any reportable investments, interests in real property and positions held on the date of assuming office, and income received during the 12 months prior to the date of assuming office.

3. Annual Statements: Designated Employees shall be required to file an annual statement on or before April 1 of each year. Designated Employees who have filed an assuming office statement between October 31 and December 31 of the prior year are not required to file another statement the following year, but shall be required to file annual statements thereafter. Statements shall disclose any reportable investments, interest in real property, income and business positions held or received during the previous calendar year

4. Leaving Office Statements: Designated Employees who leave a designated position shall file a leaving office statement within 30 days of leaving office, unless they assume a designated position at another agency within 30 days of leaving office. Statements shall disclose reportable investments, interests in real property, income, and business positions held or received during the period between the closing date of the last statement filed and the date of leaving office.

5. Acquisition or Disposal of Real Property: A Designated Employee who is required to disclose any interest in real property shall file a supplementary statement disclosing any partially or wholly newly acquired or disposed of reportable interest in real property within 30 days of that acquisition or disposal.

Manner of Reporting

Statements of economic interests shall be made on forms prescribed by the Fair Political Practices Commission. All statements shall include information concerning reportable investments, interests in real property, income and business positions held or received in accordance with 2 California Code of Regulations Section 18730(b)(7). Designated Employees who are also required to file a statement as a Designated Employee of a constituent agency of the SD-RHFA may file a single statement.

Prohibition on Receipt of Honoraria

No Designated Employee shall accept any honorarium from any source, if the member or employee would be required to report the receipt of income or gifts from that source on his/her statement of economic interests. Government Code Section 89501 shall apply to the prohibitions on receipt of honoraria. This section shall not limit or prohibit payments, advances, or reimbursements for travel and related lodging and subsistence authorized by Government Code Section 89506.

Prohibition on Receipt of Gifts

No Designated Employee shall accept gifts with a total value of more than the limit established each year pursuant to 2 California Code of Regulations 18730 in a calendar year from any single source, if the member or Designated Employee would be required to report the receipt of income or gifts from that source on his/her statement of economic interests. Government Code Section 89503 shall apply to the prohibitions on receipt of honoraria.

Personal Loans Received by Designated Employees

Personal loans received by Designated Employees may be considered gifts under 2 California Code of Regulations Section 18730(b)(8.4), for purposes of reporting them on the statement of economic interests.

Disqualification

No Designated Employee shall make, participate in making, or in any way attempt to use his/her official position to influence the making of any government decision that he/she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, the Designated Employee or a member of their immediate family, or on:

1. Any business entity with which they have a direct or indirect investment worth $2,000.00 or more.

2. Any real property in which they have a direct or indirect interest worth $2,000.00 or more.

3. Any source of income, other than gifts and other than loans by a commercial lending institution in the regular course of business on terms available to the public without regard to official status, aggregating $500.00 or more in value provided to, received by or promised to the Designated Employee within 12 months prior to the time when the decision is made.

4. Any business entity in which they are a director, officer, partner, trustee, employee, or holds a position of management.

5. Any donor or, or any intermediary or agent for a donor of, a gift or gifts aggregating in excess of the annual gift limit established by the FPPC provided to, received by, or promised to the Designated Employee within 12 months prior to the time when the decision is made.

No Designated Employee shall be prevented from making or participating in the making of any decision to the extent their participation is legally required for the decision to be made.

Manner of Disqualification

1. Designated Employees other than a member of the Governing Board. A Designated Employee required to disqualify themselves shall provide written notice of same to the Governing Board or its designee. Upon receipt of same, the Governing Board or designee shall ensure the Designated Employee is reassigned from the matter if reasonably possible.

2. In the case of a Designated Employee who is a member of the Governing Board, notice of disqualification shall be given at the meeting during which consideration of the decision takes place and shall be made part of the official record of the Board. The member then shall refrain from participating and shall attempt in no way to use their position to influence any other person with respect to the matter.

Assistance of the Commission

Any Designated Employee who is unsure of his/her duties under this code may request assistance from the Fair Political Practices Commission pursuant to Government Code Section 83114.

Adopted: January 28, 2026

San Diego Regional Housing Finance Authority (SD-RHFA)

CONFLICT OF INTEREST CODE – Exhibit 1 Designated Positions

The following positions are Designated Positions for purposes of this Conflict of Interest Code:

Position	**Category of Required Disclosure**
Members of the Governing Board	1, 2, 3
General Counsel	1, 2, 3
Chief Executive Officer	1, 2, 3

Categories of Disclosure:

Category 1 – All-Inclusive Reportable Investments (Government Code section 82034)

A Designated Employee shall disclose all reportable investments worth more than $1,000:

1. Owned by the Designated Employee, their spouse or dependent child;

2. Owned by an agent of the Designated Employee;

3. Owned by any business entity owned by the Designated Employee; and

4. Representing the pro rata share of the Designated Employee, their spouse or dependent child in any business entity or trust in which the Designated Employee, their spouse or dependent child own an interest of 10% or greater.

Category 2– Real Estate (Government Code section 82030)

A Designated Employee shall disclose all interests in real property located in the jurisdiction of SD-RHFA worth more than $1,000 which is owned by the Designated Employee, their spouse or dependent child and any interest real property of a business or trust in which the Designated Employee, spouse or dependent child owns a interest of 10% or greater.

Category 3 – All-Inclusive Reportable Income (Government Code section 82030)

A Designated Employee shall disclose all income from any agency-related source valued at $250 or more in the aggregate ($50 or more for gifts) during the reporting period.

November 18, 2025

Cody Petterson, Board President
Andra Greene, Interim General Counsel
San Diego Regional Housing Finance Authority
c/o San Diego Unified School District
Eugene Brucker Education Center
4100 Normal Street, Room 3249
San Diego, CA 92103-2682

Re: Engagement Letter

Dear Cody and Andra,

This letter is for general municipal advisory services on an as-needed basis and specifies the terms of the engagement between KNN Public Finance, LLC ("KNN") located at 2001 Addison Street, Suite 100, Berkeley, CA 94704 and San Diego Regional Housing Finance Authority ("Authority") c/o San Diego Unified School District located at 4100 Normal Street, Room 3249, San Diego, CA 92103-2682.

This engagement between San Diego Regional Housing Finance Authority and KNN Public Finance shall become effective as of the date of its acceptance as provided below.

Scope of Municipal Advisory Activities to be Performed

KNN will provide general municipal advisory services to the Authority as they develop their long-term expenditure and financing plans.

KNN Personnel

Mark Young, Managing Director and Joanna Bowes, Managing Director, will serve as the lead financial advisors and project managers on this engagement. They may be supported by one or more other KNN staff members from time to time.

Term and Termination of Engagement Agreement

The term of the Agreement shall be from January 28, 2026, through December 31, 2026. Any extensions must be mutually agreed upon by all parties in writing.

Either party may cancel and terminate this agreement, for any reason, with thirty (30) days' notice.

Compensation and Out-of-Pocket Expenses

The Authority shall pay KNN for "On-Call" Municipal Advisory Services on an hourly fee basis with a contractual cap of $25,000, subject to annual increases not-to exceed 3%.

Title	Hourly Rate
Senior Managing Director	$415.00
Managing Director	$400.00
Director	$375.00
Vice President	$350.00
Assistant Vice President	$300.00
Associate	$265.00
Analyst	$240.00

Disclosure Statement of Municipal Advisor

Part A - Conflicts of Interest and Other Matters Requiring Disclosures

Pursuant to Municipal Securities Rulemaking Board ("MSRB") Rule G-42, on Duties of Non-Solicitor Municipal Advisors, Municipal Advisors are required to make certain written disclosures to clients, which include, amongst other things, Conflicts of Interest and any Legal or Disciplinary events of KNN Public Finance, LLC (KNN) and its associated persons.

The following are potential conflicts of interest to be considered.

Conflicts of Interest Disclosures (Compensation)

- KNN represents that in connection with the issuance of municipal securities, KNN may receive compensation from an Issuer or Obligated Person for services rendered, which compensation is contingent upon the successful closing of a transaction and/or is based on the size of a transaction. Consistent with the requirements of MSRB Rule G-42, KNN hereby discloses, that such contingent and/or transactional compensation may present a potential conflict of interest regarding KNN's ability to provide unbiased advice to enter into such transaction. The contingent fee arrangement creates an incentive for KNN to recommend unnecessary financings or financings that are disadvantageous to the San Diego Unified School District, or to advise San Diego Unified School District to increase the size of the issue. This potential conflict of interest will not impair KNN's ability to render unbiased and competent advice or to fulfill its fiduciary duty to the San Diego Unified School District.
- KNN's fees under this agreement may be based on hourly fees of KNN's personnel, with the aggregate amount equaling the number of hours worked by such personnel times an agreed-upon hourly billing rate. This form of compensation presents a potential conflict of interest because it could create an incentive for KNN to recommend alternatives that would result in more hours worked. This conflict of interest will not impair KNN's ability to render unbiased and competent advice or to fulfill its fiduciary duty to the San Diego Unified School District.

- KNN's fees under this agreement, may be a fixed amount established at the outset of the Agreement. The amount is usually based upon an analysis by the Municipal Advisor and Client of, among other things, the expected duration and complexity of the transaction and the Scope of Services to be performed by the Municipal Advisor. This form of compensation presents a potential conflict of interest because, if the transaction requires more work than originally contemplated, KNN may suffer a loss. Thus, KNN may recommend less time-consuming alternatives, or fail to do a thorough analysis of alternatives. This conflict of interest will not impair KNN's ability to render unbiased and competent advice or to fulfill its fiduciary duty to the San Diego Unified School District.
- The fee paid to KNN increases the cost of investment to the San Diego Unified School District. The increased cost occurs from compensating KNN for municipal advisory services provided.
- KNN serves a wide variety of other clients that may, from time to time, have interests that could have a direct or indirect impact on the interests of another KNN client. For example, KNN serves as municipal advisor to other municipal advisory clients and, in such cases, owes a regulatory duty to such other clients just as it does to the Client. These other clients may, from time to time and depending on the specific circumstances, have competing interests. In acting in the interests of its various clients, KNN could potentially face a conflict of interest arising from these competing client interests. KNN fulfills its regulatory duty and mitigates such conflicts by dealing honestly and with the utmost good faith with its clients.
- KNN does not have an affiliate that provides any advice, service, or product to or on behalf of the client that is directly or indirectly related to the municipal advisory activities to be performed by KNN.
- KNN has not made any payments directly or indirectly to obtain or retain the Client's municipal advisory business.
- KNN has not received any payments from third parties to enlist KNN's recommendation to the Client of its services, any municipal securities transaction, or any municipal finance product.
- KNN has not engaged in any fee-splitting arrangements involving KNN and any provider of investments or services to the Client.
- KNN does not act as principal in any of the transaction(s) related to this Agreement.

Part B - Legal Events and Disciplinary History

KNN Public Finance, LLC, has never been subject to any legal, disciplinary, or regulatory actions, nor was it ever subject to any legal, disciplinary, or regulatory actions previously when it was a division of Zions First National Bank or Zions Public Finance, Inc.

A regulatory action disclosure has been made on Form MA-I for one of KNN Public Finance's municipal advisory personnel relating to a 1998 U.S. Securities and Exchange Commission ("SEC") order that was filed while the municipal advisor was employed with a prior firm, (not KNN Public Finance). The details

of which are available in Item 9; C(1), C(2), C(4), C(5) and the corresponding regulatory action DRP section on Form MA and Item 6C; (1), (2), (4), (5) and the corresponding regulatory action DRP section on Form MA-I. Issuers may electronically access KNN Public Finance's most recent Form MA and each most recent Form MA-I filed with the Commission at the following website: www.sec.gov/edgar/searchedgar/companysearch.html. For the purpose of accessing regulatory filings, KNN's CIK number is 0001664477, and SEC File number is 867-01996.

The SEC permits certain items of information required on Form MA and Form MA-I to be provided by reference to such required information already filed on a regulatory system (e.g., FINRA CRD). The above noted regulatory action has been referenced on both Form MA and MA-I due to the information already filed on FINRA's CRD system and is publicly accessible through BrokerCheck at http://brokercheck.finra.org. For purposes of accessing such BrokerCheck information, the Municipal Advisor's CRD number is 4457537.

Part C - Future Supplemental Disclosures

As required by MSRB Rule G-42, this Municipal Advisor Disclosure Statement may be supplemented or amended, from time to time as needed, to reflect changed circumstances resulting in new conflicts of interest or changes in the conflicts of interest described above, or to provide updated information with regard to any legal or disciplinary events of the Municipal Advisor. KNN will provide Client with any such supplement or amendment as it becomes available throughout the term of the Agreement.

Part D – Municipal Securities Rulemaking Board Rule G-10 Disclosure

Pursuant to Municipal Securities Rulemaking Board Rule G-10, on Investor and Municipal Advisory Client Education and Protection, Municipal Advisors are required to provide certain written information to their municipal entity and obligated person clients, which include the following:

- KNN is currently registered as a Municipal Advisor with the U.S. Securities and Exchange Commission and the Municipal Securities Rulemaking Board.
- Within the Municipal Securities Rulemaking Board ("MSRB") website at www.msrb.org, the Client may obtain the Municipal Advisory client brochure that is posted on the MSRB website. The brochure describes the protections that may be provided by the MSRB Rules, along with how to file a complaint with financial regulatory authorities.

Sincerely,

KNN Public Finance, LLC

By: _____ By: _____

Mark T. Young, Managing Director

Joanna Bowes, Managing Director

Agreed to and Accepted as of January 28, 2026

San Diego Regional Housing Authority

By: _____
Cody Petterson, Board President

By: _____
Andra M. Greene, Interim General Counsel

San Diego Regional Housing Finance Authority (SD-RHFA):

ADVISORY COMMITTEE UPDATE



Wednesday, January 28, 2026
1:00 – 3:00pm

San Diego Unified School District
4100 Normal Street
San Diego, CA 92103

GLOBAL POLICY
LEADERSHIP ACADEMY



TODAY'S OBJECTIVES

- SD-RHFA Advisory Committee Survey
- Results & Discussion

SB 440 ADVISORY COMMITTEE FRAMEWORK



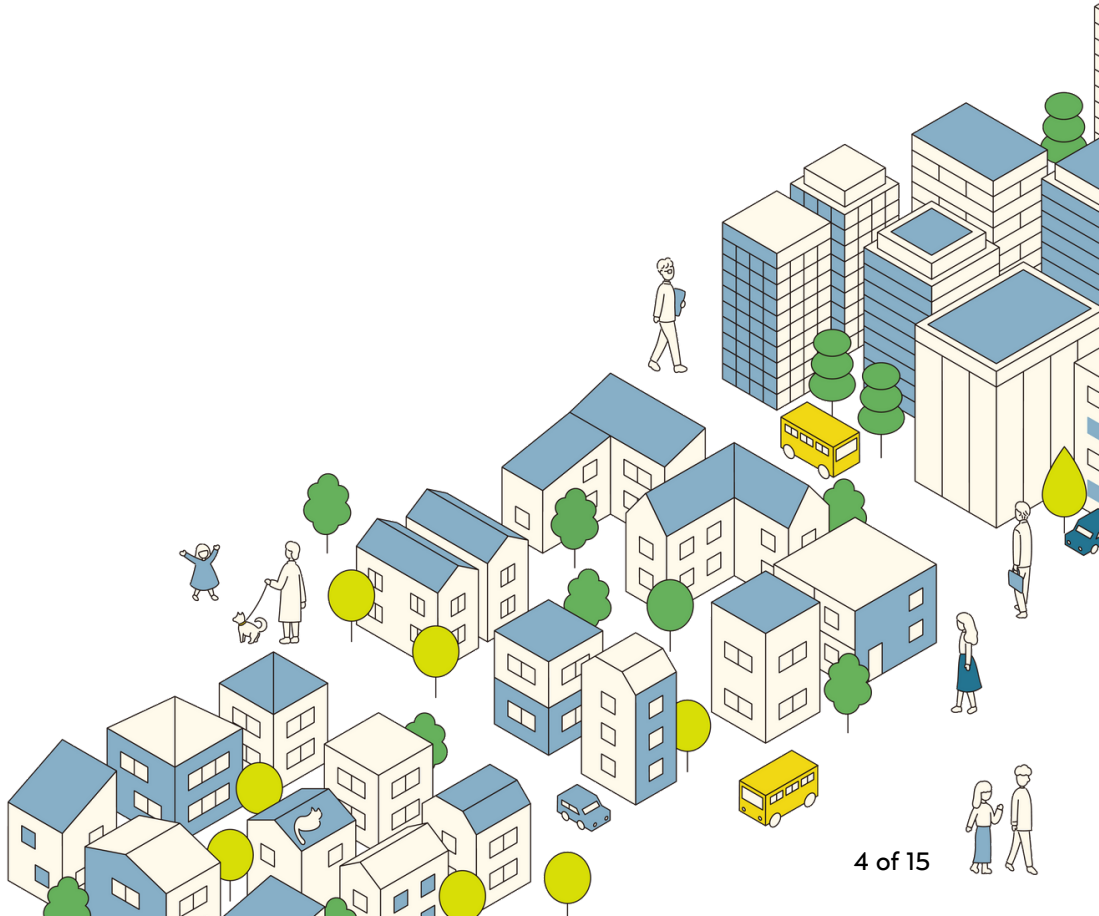
For the SD-RHFA Advisory Committee

SB 440 ADVISORY COMMITTEE COMPOSITION

The Board shall form an advisory committee composed of **nine** representatives with knowledge and experience in at least one of the following three areas below with respect to rental and/or owner-occupied affordable housing:

- Affordable housing finance
- Affordable housing development
- Affordable housing management

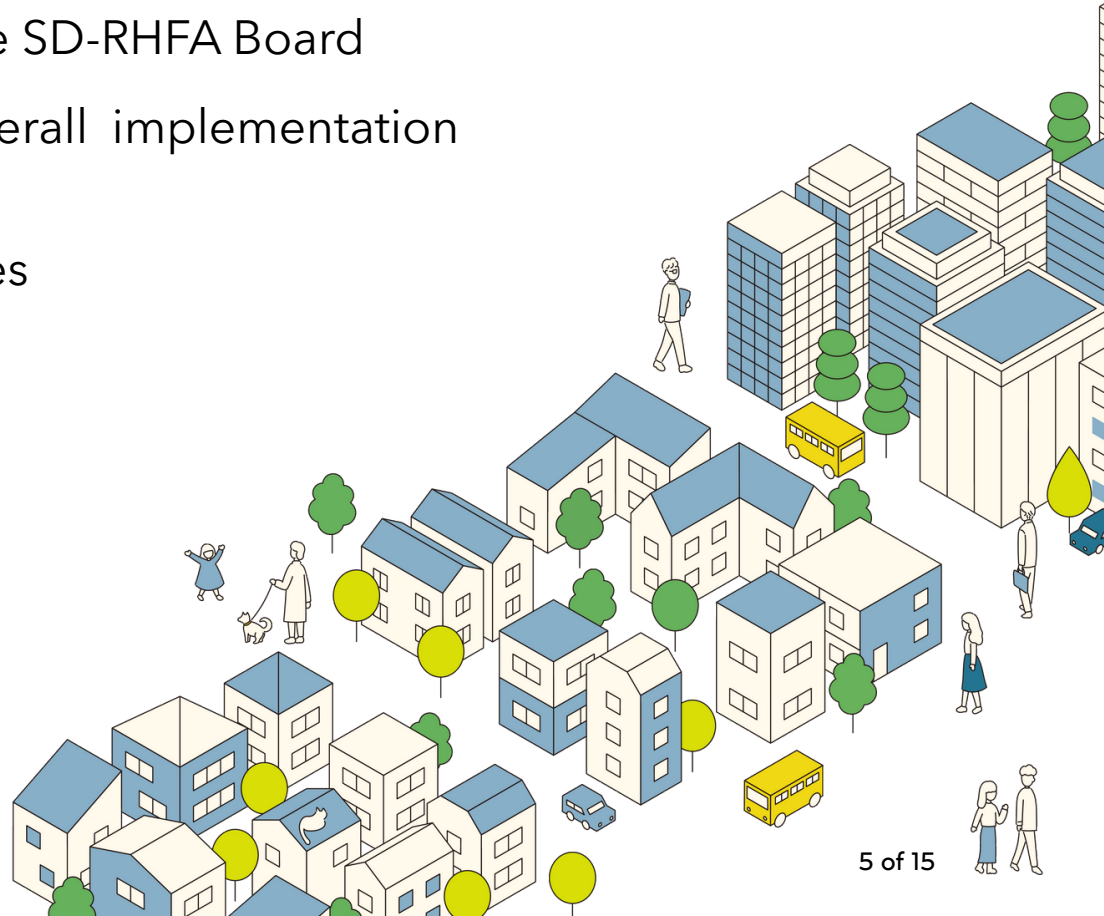
If there is a **'moving to work agency'** in the housing finance agency's jurisdiction, that agency shall have the right, but not the obligation, to be a representative on the advisory committee. As such, the **San Diego Housing Commission** is a moving to work agency, and therefore has the right (not obligation) to one of the nine seats on the SD-RHFA Advisory Committee.



SB 440 ADVISORY COMMITTEE RESPONSIBILITIES

The SD-RHFA Advisory Committee shall:

- Provide consultation and make recommendations to the SD-RHFA Board
- Assist in the development of funding guidelines and overall implementation of SD-RHFA
- Meet as necessary to fulfill their roles and responsibilities



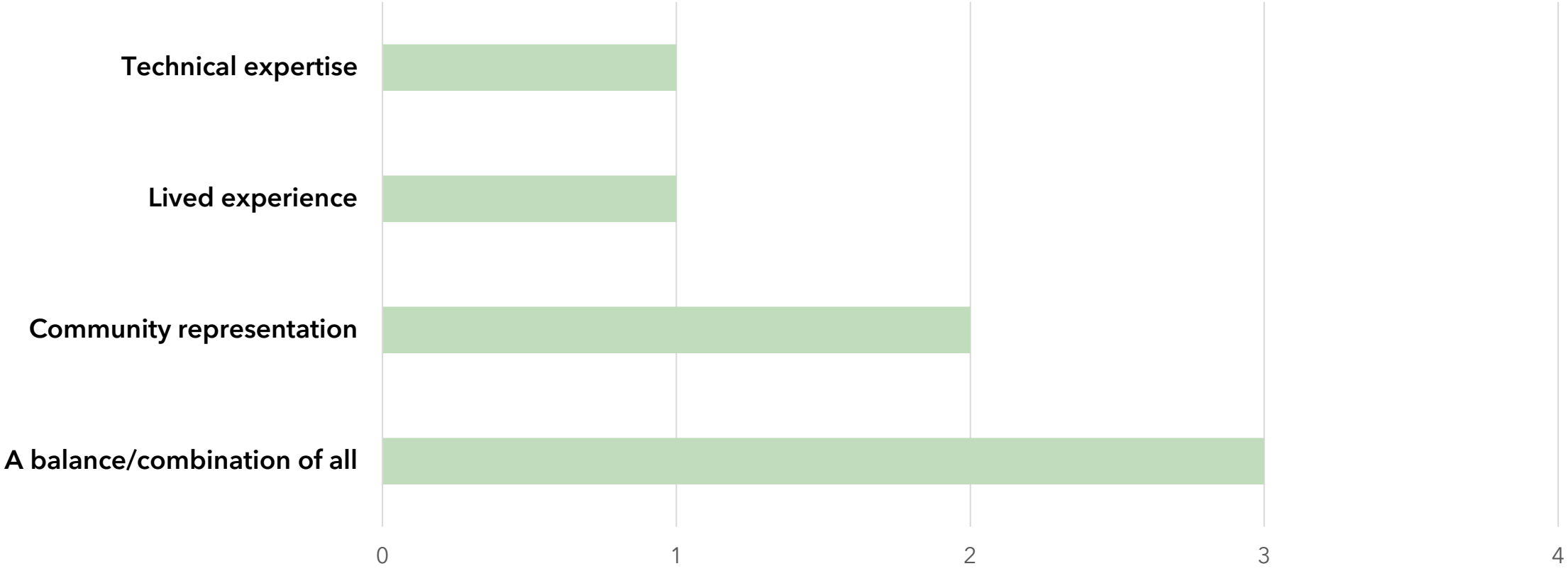
SD-RHFA ADVISORY COMMITTEE SURVEY RESULTS



Which perspectives are most important to include on the Advisory Committee?



What should Advisory Committee membership prioritize?



In your view, what role should the Advisory Committee play in preparing for a potential 2028 Citizen's initiative?

> The Advisory Committee should help shape the content of the initiative, including helping the board explore what options are available from a financial and legal perspective.

> They should be our best commercial for it.

> I would hope the housing finance and development experts would ensure we have a feasible housing plan and clear value proposition for voters; the labor, business, and resident representatives would lead efforts to gain signatures and support for the measure; and all would be active participants in encouraging people to vote for the measure. The LACAHSA story of community engagement is a good example of what a highly impactful advisory committee could look like in terms of getting an initiative on the ballot and approved.

> Community outreach
> Social media campaign
> Determining specifics of Bond's intended goals

> The advisory committee's role is to guide decision making, assisting in reviewing initiative structure, and advising on engagement with stakeholders.

What is one thing you believe is critical to get right in the design and seating of the Advisory Committee?

> We need the technical expertise to ensure we have a viable, actionable housing plan that would deliver on value we tell voters we can achieve.

> I think it's critically to prioritize representational balance for the design and seating of the advisory committee.

> legalities and real community understanding.

> A balance of technical expertise and community input.

> Voices of individuals directly impacted by lack of affordable housing. Recent grads, single parent households, so-called Gen Z groups with political and social justice intent & experience.

Please list any specific organizations that you feel would best fit the areas of expertise you indicated above.

> San Diego Youth Homelessness Consortium, Community Housing works, San Diego Inter-Faith Housing Foundation, San Diego Urban League

> Our Time to Act
> Youth Will
> Labor (trades)

> There are a couple of successful nonprofits that do housing- I would say Urban League and MAAC Project.

> San Diego Housing Federation
> Center on Policy Initiatives

> I do not have any specific recommendations at this time.

SD RHFA ADVISORY COMMITTEE DISCUSSION



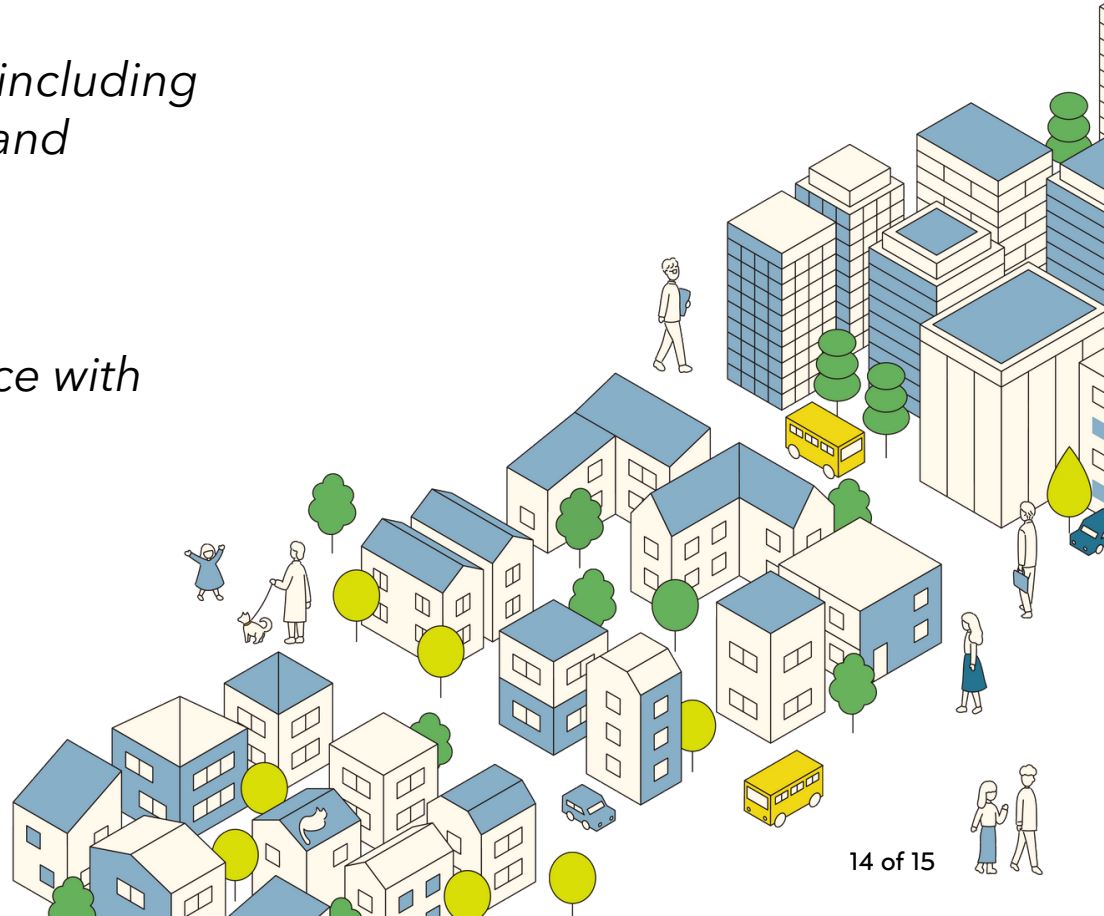
BRAINSTORMING EXERCISE – ADVISORY COMMITTEE SEATS

Categories of Seats	Total # Seats by Area of Expertise – (9 Seats Required)	Recommended Organization(s) – Not Exhaustive List
Affordable Housing Finance	Recommended minimum of one seat	Retired lenders/bankers, real estate professors, local governments housing representatives located outside of the SD-RHFA's jurisdiction
Affordable Housing Development	Recommended minimum of one seat	Retired affordable housing developers, real estate professors
Affordable Housing Management	Recommended minimum of one seat	Retired affordable housing management professionals, Fair Housing legal experts
Moving to Work Agency (San Diego Housing Commission)	Has the right, not the obligation to have one seat	The San Diego Housing Commission
Labor and Workforce	Optional	San Diego County Apartment Association, Building Industry Association of San Diego, American Planning Association, San Diego Housing Federation, Black Contractors Association, Urban Land Institute of San Diego, labor unions
Education Leaders	Optional	Other school districts, charter schools, higher education institutions etc.
Design Professionals	Optional	American Institute of Architects, New School of Architecture etc.
Community Organizations	Optional	Local community planning groups (e.g., San Diego Community Planning Groups), the Downtown San Diego Partnership, Our Time to Act, Center on Policy Initiatives, San Diego Urban League
Lived Experience	Optional	Individuals with lived experience (e.g., homeless SDCCD students etc.), San Diego Youth Homelessness Consortium
Workforce Middle Income Housing Expertise	Optional	Retired developers and/or related experts in the middle-income space
Others (e.g., Tenants rights, Affirmatively Further Fair Housing orgs., faith-based etc.)	Optional	Regional Task Force on Homelessness San Diego

ADVISORY COMMITTEE SELECTION PROCESS RECOMMENDED NEXT STEPS

Preparation of a draft Advisory Committee Charter for the Board's consideration that would help to:

- *Define how the Committee is appointed and operates—including meeting procedures, term limits, roles/responsibilities, and processes for vacancies, resignations, and removals etc.*
- *Specify how it reports to the Board and the public*
- *Set expectations for transparency, ethics, and compliance with conflict-of-interest requirements*



Questions?

Danny Serrano
Senior Associate
daniel@lesardevelopment.com

Debbie Ruane
San Diego Market Manager
debbie@lesardevelopment.com

THANK YOU!



San Diego Regional Housing Finance Authority (SD-RHFA):

2026 WORKPLAN OVERVIEW



Wednesday, January 28, 2026
1:00 – 3:00pm

San Diego Unified School District
4100 Normal Street
San Diego, CA 92103

GLOBAL POLICY
LEADERSHIP ACADEMY



TODAY'S OBJECTIVES

- 2026 SD-RHFA Workplan Budget
- 2026 SD-RHFA Workplan Priorities

2026 BUDGET AND ANTICIPATED DRAW SCHEDULE

Total 2026 Annual Budget: $307,124

- *$250,000 Prebys grant for 2026 workplan*
- *$57,124 carry-over funds from 2025*

~~Anticipated Draw Schedule~~

- ~~*First quarter – $169,587*~~
- ~~*Second quarter – $137,537*~~

2026 FORECAST EXPENDITURE SCHEDULE

Draw Down Party	Expense Items	Carry-Over from 2025	Prebys Funds	Total 2026 Budget	Withholding of Fiscal Agent Fee	Q1	Q2	Forecasted to Date
GPLA	Contracted Board and Organizational Support – Q1, Q2 Only		$150,000	$150,000		$75,000	$75,000	$150,000
GPLA	Allowance for Advisory Board outreach events; assistance		$8,500	$8,500		$8,500		$8,500
GPLA	Website Launch/Hosting/Graphic Design (to .gov standards)	$11,000	$49,000	$60,000		$60,000		$60,000
GPLA	Meeting costs (food, etc)	$1,377		$1,377		$690	$690	$1,377
GPLA	Contingency (for Misc. items, etc.)	$14,747		$14,747		$5,898	$8,847	$14,747
GPLA	Travel & Training 15 people @ $2K each (includes advisory board)		$30,000	$30,000			$30,000	$30,000

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2026 FORECAST EXPENDITURE SCHEDULE

Draw Down Party	Expense Items	Carry Over from 2025	Prebys Funds	Total 2026 Budget	Withholding of Fiscal Agent Fee	Q1	Q2	Forecasted to Date
Fiscal Agent	Fiscal Sponsorship @ 3% (SDCCD)		$7,500	$7,500	$7,500			$7,500
SDRHFA	Insurance		$5,000	$5,000			$5,000	$5,000
SDRHFA	Financial Consulting	$25,000		$25,000		$10,000	$15,000	$25,000
SDRHFA	Legal Counsel and Meeting Support - SD Unified	tbd						
SDRHFA	Formation and Incorporation Costs	tbd	n/a					
SDRHFA	Accounting	tbd						
SDRHFA	Misc	$5,000		$5,000		$2,000	$3,000	$5,000
TOTAL		$57,124	$250,000	$307,124	$7,500 Q1	$162,088	$137,537	$307,124

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2026 WORKPLAN

Workplan Priorities



Advisory Committee
In Process



Website Development
In Process



Continual Learning Plan
To be Determined

QUESTIONS?

Danny Serrano
Senior Associate
daniel@lesardevelopment.com

Debbie Ruane
San Diego Market Manager
debbie@lesardevelopment.com



THANK YOU!