

Stephanie Shipe

Vice President of Property Management

Alta Housing, Palo Alto, CA

Email: [REDACTED]g | LinkedIn: [REDACTED]

Professional Summary

Strategic leader with over 15 years of experience in affordable housing and property management, driving measurable outcomes such as improved operational efficiency, enhanced resident satisfaction, and successful program innovation. Demonstrated expertise in developing innovative solutions, fostering collaborative partnerships, and driving systemic change to serve diverse communities. Passionate about elevating women's leadership and championing equity in housing.

Key Skills

- Strategic Leadership & Vision
 - Team Development & Mentorship
 - Stakeholder Collaboration
 - Program Innovation
 - Financial & Budget Management
 - Data-Driven Decision-Making (e.g., leveraging analytics to improve operational efficiency and service outcomes)
 - DEI Initiatives & Community Advocacy
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Professional Experience

Vice President of Programs and Operations

Alta Housing, Palo Alto, CA

05/2023 – Present

Non-Profit Affordable Housing Developer and Manager

- Provide strategic leadership for Property and Asset Management teams, overseeing compliance with loan contracts and regulatory agreements.
- Spearheaded the launch of a \$750K Wellness Navigator Program, resulting in a 30% increase in resident access to health services and financial counseling, directly improving community well-being and stability.

- Designed and implemented key performance indicators (KPIs) to align departmental outcomes with industry benchmarks.
- Negotiated multi-million-dollar contracts to enhance services across a portfolio of 690 units and 1,500 residents.
- Co-developed a leadership training program to empower staff and build a pipeline for future leaders.

Director of Portfolio Management

The Housing Authority of the City of Alameda, Alameda, CA 10/2020 – 05/2023

- Facilitated COVID-19 vaccination efforts, organizing clinics that served over 300 vulnerable residents.
- Managed relationships with key stakeholders, resulting in a 25% increase in community service programs and securing additional funding for resident initiatives.
- Directed annual budgeting processes, achieving financial stability while addressing community needs.

Director of Property Operations

MidPen Housing, Foster City, CA 05/2016 – 10/2020

- Led a regional restructure to optimize operational efficiency for 50+ properties, resulting in a 20% improvement in team efficiency and a 15% increase in resident satisfaction scores.

Supervised a team of 78 staff across 52 properties, achieving 100% compliance with government inspections.

- Collaborated on a five-year strategic plan to support organizational growth and resilience.
- Increased net operating income by 10% through innovative management practices.
- Championed DEI initiatives to create an inclusive workplace culture.

Executive Portfolio Manager

FPI Management, Folsom, CA 05/2007 – 05/2016

- Developed strategic partnerships that reduced operating costs by 32%.
- Initiated employee engagement programs that lowered staff turnover by 20%.
- Directed the transition to a new property management software system, enhancing operational efficiency.

Senior Intelligence Analyst (E-5)

United States Army
08/1998 – 12/2004

- Managed a team of 14 personnel, providing intelligence reports and assessments to high-ranking officials.
 - Served as an Equal Opportunity Advisor, promoting equity and addressing workplace challenges.
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Key Achievements

- **Community Impact:** Established partnerships with local agencies to combat food insecurity, resulting in consistent support for 140 families during the pandemic and laying the groundwork for sustained collaboration that continues to serve vulnerable communities post-pandemic.
 - **Systemic Change:** Led a property management restructure, streamlining operations and enhancing service delivery.
 - **Innovative Programs:** Implemented Esusu, a platform to help residents build credit and improve financial health.
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Education

Bachelor of Business Management
University of San Francisco
2019 – 2022

Associate of Business Administration
City College of San Francisco
2017 – 2018

Certifications

- Certified Asset Manager (Consortium for Housing & Asset Management)
 - Tax Credit Specialist (National Center for Housing Management)
 - Housing Credit Certified Professional (National Association of Home Builders)
 - Certified Occupancy Specialist (Zerfert & Associates)
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Affiliations

- Board Member, National Affordable Housing Advocacy Association
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Interests

- Women's Leadership Development, with a focus on mentoring emerging leaders in affordable housing
 - Affordable Housing Policy
 - Community Empowerment through DEI Initiatives
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KYLE DANIEL DESHON

EDUCATION

University of California, Berkeley, Haas School of Business

May 2023

Master of Business Administration, Interdisciplinary Graduate Certificate in Real Estate (IGCRE)

- VP Events Berkeley Real Estate Club (BREC), organized 2022 BREC Summit on sustainability; Real Estate Peer Advisor
- 2022 NAIOP Golden Shovel case competition (winner), 2022 UT Austin National Real Estate Challenge team (2nd)

Northeastern University, College of Engineering

May 2016

Bachelor of Science, Civil Engineering, summa cum laude

- Delft Technical University Study Abroad, Delft, Netherlands, Summer 2015
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EXPERIENCE

Sares Regis of Northern California, Financial Associate and Asset Manager

June 2023 - Present

- Oversee a portfolio of 8 properties totaling 1,300 units across the Bay Area. Develop and execute asset level business plans to maximize value and ensure returns are aligned with investor goals
- Provide financial analysis, assist with investor outreach, and prepare reports as required by the CFO to keep investors apprised of asset performance and further investor-manager relationship for future projects
- Draft proformas and perform financial analysis on future for-rent and for-sale development projects. Work directly with Chief Investment Officer to run land acquisition meetings, refine analysis, and draft IC memos for potential acquisitions
- Assist with dispositions of existing assets and acquisitions of new development projects. Perform market analysis, outreach with brokers, and coordinate due diligence efforts

Boston Properties, MBA Associate (Summer - Spring 2023)

June 2022 – May 2023

- Modeled a phased, mixed use redevelopment project involving multiple joint venture partners, including JV level returns, sensitivities, and various contribution and catch-up methods. Drafted the output products used by leadership team to approach potential partners to discuss involvement in the project and future development strategies
- Performed financial analysis, due diligence, and developed proformas for potential residential, office, and life science development projects across the Bay Area, allowing local executive team to make informed investment decisions
- Conducted market research and analyzed rent, demographic, and planning trends to identify target markets for future residential projects; assembled cost and revenue data for use in company-wide focus on residential opportunities

United States Navy, Civil Engineer Corps Officer

2016 - 2021

Construction Manager, Portsmouth Naval Shipyard, Kittery, ME (2019 - 2021)

- Responsible for all contractor coordination, billing, negotiations, and contract modifications for \$53.3M in construction projects (including new build, renovation, and HVAC) ensuring all requirements were met and minimizing disruption to users, ultimately ranked #3 of 17 peers across East Coast within 5 months of reporting
- Served as primary Government representative for \$31.2M Medical & Dental Clinic replacement project, revitalized Government-Contractor relationship, cleared backlog of \$221.5K in contract change orders, and coordinated with contractor to reduce project schedule by 28 days

Detail Officer-in-Charge, Naval Mobile Construction Battalion FIVE, Port Hueneme, CA and Okinawa, Japan (2016 - 2019)

- Led day-to-day operations of 40-person multinational labor force, consisting of 14 US and 26 Royal Thai Navy engineers, during construction of \$57K library building in Thailand overcoming numerous funding and transportation shortfalls and deepening US partnership in region
 - Devised and coordinated training of 46 personnel to test new experimental airfield damage repair methods (damage assessment, soil/cement backfill, and concrete repairs of craters, and spalls) leading to successful completion of 4-day joint exercise with Explosive Ordnance Disposal and validation of methods and timelines
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ADDITIONAL

- Licensed Professional Engineer (Civil) in the State of Idaho (# 20051)
- Completed the Adventures in Commercial Real Estate (A.CRE) Real Estate Financial Modeling Accelerator and ARGUS bootcamp

Melissa Buendia

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To Whom it May Concern,

Attached is my resume for Board Members – MVW Residences Corporation. A little about me my entire career has been in the financial services industry mainly in Marketing. I have worked closely with our mortgage lending team and this past year I have developed close relationships with the realtors in the areas that we serve. I understand how the home loan process works.

Meriwest Credit Union has been in the Mountain View community for many years. I would love to discuss the board position you have available further if you feel my qualifications can be a match.

Sincerely,

Melissa Buendia

Melissa Buendia

Skills & Abilities

- Excellent public speaking
- Excellent at building a team and giving clear communication so goals can be met
- Developing, enhancing, and deepening member relationships
- Excellent listening skills
- Excellent at following up with people
- Knowledgeable and adept to conducting market research
- Excellent organizational skills
- Excellent project and time management skills

Key Accomplishments

- Manage and support all public relationship activities
- Worked closely with our mortgage lending department to help promote our various mortgage loans
- Increased Business Development productivity by setting goals in line with company's strategic plan and measured progress weekly
- Work with Branch Managers and Relationship Managers to develop and increase member relationships
- Collaborated on several teams, including Community Development and Product Management Team
- Managed a team of four and gave clear direction of department goals and company goals
- Worked with our Core SEGs, and the community to increase credit union awareness
- Supported the Relationship Managers with their SEG relationships to help increase awareness of the Credit Union
- Created and presented PowerPoint presentations for SEG groups offering financial literacy for their employees
- Attend tabling events to bring awareness to the credit union and opened new accounts
- Responsible for the company's overall marketing strategies and tactics
- Write clear, concise and effective copy, staff communications and reports
- Defined and ensured consistency for all corporate communications
- Ensure high quality, error-free communications
- Track and measure results of all marketing programs through the MCIF
- Implemented and maintained informative and sales-oriented website
- Managed all marketing vendors; including printers, designers and mail houses
- Increased new member accounts with the credit union by 40% within the first 90 days of opening membership by utilizing matrix mailings/emails and working with the branches and digital banking on follow up calls and at various Business Development activities
- Work closely with Branch Managers for sales and service programs and improved overall company sales by over 30%
- Maintain consistent corporate graphic standards for all sales and marketing materials
- Implemented, maintained, and utilized MCIF database for research, reporting and target marketing

- Lead a team for a revamp of corporate website
- Developed and implemented annual marketing plan and budget
- Manage projects at or under budget
- Understanding of Social Media advertising and Google AdWords

Work Experience:

8/22 – Present – Business Development Officer, Meriwest Credit Union, San Jose

11/17 – 6/22 – Marketing Director, Stanford Federal Credit Union, Palo Alto

1/13 – 11/17 – Marketing/Business Development Mgr. – SafeAmerica Credit Union, Pleasanton

3/08 – 12/12– Marketing/Business Development Mgr. – National 1st Credit Union, Santa Clara

11/05 – 2/08 – Marketing/Business Development Director – Sterlent Credit Union, Pleasanton

1996 – 2005 – Marketing/Business Development Mgr. – Commonwealth Central Credit Union, San Jose

Professional Organizations

Women in Leadership through Polka dot

Member of the Women's Networking Alliance Mountain View Chapter

Santa Clara Chamber of Commerce Women in Business

Ambassador Mountain View Chamber of Commerce

Ambassador San Jose Chamber of Commerce

Ambassador Morgan Hill Chamber of Commerce

MERIS OTA, P.E., S.E.

PROFILE

Collaborative commercial real estate executive focused on people and processes. Experience spans the full asset life cycle including due diligence, acquisition, development, stabilization, repositioning, and disposition. Familiar with residential, office/ life-science, industrial, healthcare, and retail asset classes. Throughout her career, has worked directly on a portfolio totaling approximately 15,000,000.s.f. Recognized as a “40 Under 40” honoree by the San Francisco Business Journal. Professional strengths include:

- Market Knowledge and Due Diligence
- Entitlements, Permitting, and CEQA
- Contract Negotiation
- Project Controls and KPIs
- Financial Reporting
- Strong Communication Skills
- Process Efficiency
- Strategic Planning
- Risk Mitigation
- Procurement
- Investor Relationships
- Leadership and Teambuilding

PROFESSIONAL EXPERIENCE

Trammell Crow Company (CBRE), San Francisco, CA

2022 – 2024

TCC is a wholly owned subsidiary of CBRE and has been ranked by CPE as the #1 developer in the U.S. since 2014.
Senior Vice President

Scaled the business unit through successful delivery of developments. Led teams of 75+. Actively managed \$1 billion of investments to ensure that they met or exceeded targeted returns. Solicited early stakeholder input from brokers and property managers to achieve income and operational optimization. Launched TCC's first nationwide Market Trends / Construction Cost Report and operationalized its ongoing quarterly delivery. Worked with TCC's executive team to refresh the company's job descriptions and career paths. Projects include:

- *200 Twin Dolphin Drive, Redwood Shores*
Gained investment committee approval. Negotiated GMP contract and launched construction for this 234,000 s.f. ground-up development, catalyzing a significant revenue generation for our business unit.
- *Discovery on Grand, South San Francisco*
Led the value-creation effort of winning unanimous discretionary City approvals for a 500,000 s.f. project.
- *Residential Feasibility Study, San Mateo*
Conducted a residential feasibility study for redevelopment of 36 acres currently occupied by retail users.

Project Management Advisors, South San Francisco, CA

2019 – 2022

PMA is an S Corp with six U.S. offices offering fee-based development, project, and investment management services.
Vice President and Shareholder

Responsible for client management with institutional investors. Led project execution, including managing teams on large-scale developments. Guided corporate business strategy and operations. Sample projects include:

- *One Steuart Lane, Paramount Group, San Francisco*
At client's election, joined the team as development manager during the permitting process. Established reporting formats and financial processes for this 20-story, 120-unit luxury residential project. Oversaw construction and marketing.
- *Affordable Housing Investment Fund Program Management, Confidential Client, SF Bay Area*
Led a team provide due diligence for projects, including modular construction, within an investment fund.
- *Vallco Town Center (rebranded "The Rise"), Confidential Client, Cupertino*
Provided investment management for this mixed-use project consisting of 2,400 homes, 2,000,000 s.f. of office space, and 226,000 s.f. of retail space and for a sovereign wealth fund.
- *Life Science Repositioning Projects, Confidential Clients, Multiple Locations*
Assessed feasibility of repositioning retail and office assets into life-science uses. Led development efforts including entitlements, team selection, design, budget and schedule management.
- *Southline, Lane Partners, South San Francisco*
Drove project strategy to align with client's business plan for a 2,700,000 s.f. ground-up life-science / office development. Developed financial reporting, schedules, and work plans to support this strategy.

Sares Regis Group of Northern California, San Mateo, CA

2011 - 2019

SRGNC is a privately held, vertically integrated company specializing in local development, investment, and advisory.
Vice President, Commercial Development

Responsible for managing commercial developments, business development initiatives, hiring, and training in Northern California. Initiated an internal professional development series. Concurrently managed 11 colleagues across seven teams, and projects with a combined value of over \$1 billion. Sample projects include:

- *Fortinet, Sunnyvale*

Led entitlements for a 770,000 s.f. masterplan. Developed a 170,000 s.f. building on an expedited schedule.

- *2101, 2111, and 2121 Tasman Drive, Deutsche Bank, Santa Clara*

Assisted Deutsche Bank with a long-range strategy, highest-and-best use analysis, and disposition of this 6.6 acre property. Evaluated residual land values associated with commercial, for-sale residential and multi-family residential development options prior to broker engagement. Positioned the property for sale.

- *Informatica, Pacific Shores, Redwood City*

Performed a site selection exercise for Informatica's new headquarters. Evaluated ground-up opportunities, and the lease or purchase of existing buildings. Developed proformas and schedules for each option to inform Informatica's decision to purchase two buildings totaling 290,000 s.f. at Pacific Shores. This transaction was recognized as the "Bargain of the Year" by the San Francisco Business Journal in 2013.

Three years later, pursued entitlements to allow Informatica to grow in place at their existing location in Pacific Shores by developing an additional 300,000 s.f. of office.

- *NVIDIA, Santa Clara*

Led development of NVIDIA's new 500,000 s.f. building, the first phase of a development agreement which allows for 1,950,000 s.f. Gained unanimous Planning Commission and City Council approvals on a development agreement amendment and an addendum to the CEQA environmental impact report (EIR) in 4 months. Negotiated the project's conditions of approval with the City, yielding considerable project savings. Developed and executed a monthly draw process to meet the financial requirements of the client and lending team. Engaged a construction audit of the general contractor and managed the close-out process.

- *Foster City Center, Northwestern Mutual*

Gained City Council approval of an EIR Addendum and Development Agreement for this 800,000-square-foot, \$350M development. Coordinated and negotiated with the adjacent landowner, working towards completion of the joint development agreement.

- *Los Altos Community Investments, Los Altos*

Led development for a two-part project including an 80,000 s.f. ground-up market-rate building and public park delivered through a public-private partnership. Directed City entitlements. Met with City staff and elected officials to complete an ENA for the public park.

- *Value-Add Renovation of Existing Office Building for a Confidential Client, Menlo Park*

Developed a repair and renovation scope, budget, and schedule for an office building constructed in the early 1980's. The scope included podium waterproofing repairs, landscaping improvements, and upgrades to the lobby storefront, common areas, and mechanical and electrical infrastructure.

- *Airgas, Redwood City*

Redeveloped an existing 10,000s.f. industrial building on a 1.25-acre site in Redwood City for use by Airgas as a fill distribution plant. Upgraded the building for "hazardous use" and completed seismic upgrades.

- *City of Redwood City – Docktown Marina*

Completed due diligence on behalf of City for a privately-owned land parcel leased by Docktown Marina. Due diligence efforts addressed both property and marina operations. Selected and directed consultants, and managed the exchange of information between consultants, City officials, occupants, and marina lessees.

KPFF Consulting Engineering, San Francisco, CA

2005 - 2011

Structural Engineer

Provided structural engineering consulting and tailored client service throughout all project phases. Collaborated with architects, contractors, and design professionals to develop creative and pragmatic structural solutions that benefited the overall project. Product types ranged from commercial, institutional, and healthcare, to large-scale residential.

CREDENTIALS & AFFILIATIONS

- Stanford Professionals in Real Estate (SPIRE)
 - Real Estate Council and Board of Directors (2021-present), Regional Director (2018-2021)
- HIP Housing, San Mateo County
 - President (2022-present), Vice President, (2020-2022), Board of Directors, (2016 - present)
- Licensed Structural Engineer (S5716) and Civil Engineer (C71821), State of California

EDUCATION

- Stanford University, Master of Science - Structural Engineering
- National Science Foundation – Natural Hazard Mitigation in Japan Program
- University of Hawaii - Manoa, Bachelor of Science - Civil Engineering. Regents' Scholarship recipient.

JAMES F. POLLART

EDUCATION

THE WHARTON SCHOOL, University of Pennsylvania
Master of Business Administration, Double Major in Real Estate and Finance

Philadelphia, PA
May, 1996

PURDUE UNIVERSITY
Bachelor of Science in Civil Engineering

West Lafayette, IN
May, 1984

EXPERIENCE

CLASSIC COMMUNITIES
Partner, Senior Vice President

Palo Alto, CA
2014 - 2019

- Senior executive, managed all company departments
- Led all land acquisition, entitlements and marketing activities

IRVINE COMPANY APARTMENT DEVELOPMENT
Vice President – Acquisitions

Milpitas, CA
2012 - 2014

- Helped assemble and launch bay area apartment development group
- Lead / manage bay area land acquisition activities for apartment division
- Interface with office and retail groups on acquisition and development of mixed use projects.

O'BRIEN HOMES
Partner, Vice President – Land Acquisition and Forward Planning

Foster City, CA
2001 - 2011

- Member of senior management team for privately owned builder / developer
- Managed all land acquisition and forward planning activities for company

CASTLE GROUP CALIFORNIA, INC
Vice President – Land Acquisition and Development

Mountain View, CA
1998 - 2001

- Member of senior management team for privately owned builder / developer
- Managed all land acquisition and forward planning activities for company

KAUFMAN & BROAD SOUTH BAY, INC.
Manager, Land & Planning

Fremont, CA
1996 - 1998

- Senior land acquisition / development professional in South Bay Division
- Successfully processed entitlements for approximately 1,500 units.

BRIAN KANGAS FOULK CIVIL ENGINEERS
Senior Project Manager

Redwood City, CA
1990 - 1994

- Senior manager responsible for over \$1 million in annual billings.
- Managed the design and permitting of large residential and commercial projects.

BEALS AND THOMAS, INC.
Project Manager / Civil Engineer

Westborough, MA
1986-1989

- Performed design and entitlement processing for residential and commercial projects.

VANASSE HANGEN ENGINEERS, INC.
Civil Engineer

Boston, MA
1984-1986

- Provided engineering and construction inspection services for public and private sector projects.

Licensed California Real Estate Broker and Civil Engineer.

PROFESSIONAL SUMMARY

A seasoned Branch Manager with over twelve years of finance industry experience, bringing expertise in financial management, team leadership and client / community relationships. Skilled in financial planning, budgeting, and resource management, driving growth and tailoring solutions to meet community needs. Active in the local community, volunteering and driving funding for non-profit organizations bridging relationships through community outreach.

PROFESSIONAL EXPERIENCE

Branch Manager II Fremont Bank Mountain View, CA

April 2019 – Present

- Generate new business within branch market for deposit accounts, loans, and cash management.
- Supervise branch staff, including coaching, development, and discipline to help meet sales goals, strict adherence to policies and procedures, and to provide exceptional customer service, with staff level based on branch staffing.
- Collaborate with the Fremont Bank's non-profit committee to help expand relationships with non-profit organizations that are recipients of the Fremont Bank Corporate Giving Program to help local nonprofits improve the quality of life in the communities served.

Relationship Banker II – Bank of the West Menlo Park/Los Altos, CA

Aug. 2012 – Mar. 2019

- Enhanced customer relationship and referred customers to other business associates, further developing relations.
- Assisted managers with daily operation of branch, executed operational activities, overrides, signing authority on cashier's check and handle the branch in the absence of the manager.
- Coached tellers to engage with customers, promote services, and conduct sales transactions.
- Recognized by customers for excellent customer service and by management for exceeding goals.

Service Banker (Teller) – Bank of the West Palo Alto, CA

Mar. 2009 – Aug. 2012

- Assisted supervisor by maintain responsibility ordering cash and processing cash transactions including deposits, transfers, withdrawals, and overdraft reports.
- Established credibility and enhanced communication with customers to build relationships and expand offerings of services to clientele.

COMMUNITY OUTREACH

Bay Area Friendship Circle – Volunteer

Palo Alto, CA

AWARDS

President's Club Award

December, 2022 & December, 2023*Issued by Fremont Bank**Fremont Bank President's Award recognizes employees for outstanding performance and contributions, within specific divisions or for exceptional client service and community building.*

Circle of Excellence - Elite

Quarterly: 2022, 2023, 2024, 2025*Issued by Fremont Bank**Fremont Bank "Circle of Excellence" is a program that recognizes and rewards top-performing staff and their support teams within the organization.*

Circle of Excellence

December, 2017*Issued by Bank of the West*

LANGUAGES

Languages: English • Hindi • Gujarati