

# BEACH CITIES HEALTH DISTRICT

## REQUEST FOR EXPRESSION OF INTEREST (RFEOI)

### FORMER SOUTH BAY HOSPITAL REDEVELOPMENT

August 7, 2025



#### STATEMENT OF QUALIFICATIONS SUBMITTAL

Attn: Monica Suua, Beach Cities Health District

**Philip Kroskin**

Head of Real Estate  
SVP Investments  
philip.kroskin@sunriseseniorliving.com  
571.279.1918

**Sunrise Senior Living**

7902 Westpark Drive  
McLean, VA 22102  
Federal ID #: 62-1247513



# Suitability and Interest Form



**BEACH CITIES HEALTH DISTRICT**  
**REQUEST FOR EXPRESSION OF INTEREST (RFEOI)**  
**FORMER SOUTH BAY HOSPITAL REDEVELOPMENT**

Issue Date: June 30, 2025  
Expression of Interest Due Date: **August 7, 2025**  
Expression of Interest Directed To: Beach Cities Health District  
Expression of Interest Contact: Monica Suua Monica.Suua@bchd.org  
Number of Expression of Interest Copies: 1 electronic copy

Complete the section below and include with submission documents. By signature hereto, the Respondent certifies that all representations and certifications contained in its response are complete and accurate as required.

**Respondent:**

Name of Respondent Firm: Sunrise Development, Inc.  
Name of Authorized Representative: Philip Kroskin  
Signature: Philip Kroskin  
Title: Head of Real Estate, SVP Investments  
Date: 08/07/2025  
Phone #: 858-663-8814  
Federal Emp. ID#: 62-1247513  
Fax #: N/A  
E-mail address: Philip.kroskin@sunriseseniorliving.com

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SUITABILITY AND INTEREST FORM

# Sunshine Senior Living

**August 7, 2025**

**Monica Suua**

Beach Cities Health District  
514 North Prospect Avenue  
Redondo Beach, CA 90277  
monica.suua@bchd.org

## **Re: Request for Information and Qualifications for Beach Cities Health District Healthy Living Campus**

Dear Monica,

On behalf of Sunrise Senior Living (“Sunrise”), we are pleased to submit our response to the Request for Information and Qualifications (“RFIQ”) for the Beach Cities Health District’s Healthy Living Campus project.

We are enthusiastic about and fully aligned with Beach Cities Health District’s vision for a dynamic, intergenerational, wellness-focused campus that promotes active aging, preventive health, and meaningful community engagement. Sunrise brings nationally recognized expertise in senior living and wellness-centered development, with a long-standing track record of creating communities that support physical, social, and emotional wellbeing. Our team is well positioned to deliver a high-quality, mission-driven community that furthers the goals of BCHD and serves as a national model for health-forward urban design. We have been engaged in conversations with BCHD and interested in this opportunity for several years, and we remain committed to bringing this shared vision to life.

Our capabilities include:

- Sunrise Senior Living, one of the most respected and experienced developers and operators of senior housing in the U.S., with more than 250 communities across the country, including 18 communities in California.
- KTG Architects, an award winning architecture and planning firm with deep experience in designing vibrant, wellness focused communities, including senior living, intergenerational housing, and mixed-use environments. KTG brings a collaborative, human-centric approach tailored to projects like the Healthy Living Campus.

We welcome the opportunity to partner with BCHD to advance its vision for a community integrated, health focused senior living and wellness campus. This proposal is submitted by authorized representatives of the development team, and we look forward to the opportunity to collaborate with BCHD to bring this vision to life.

Sincerely,



**Philip Kroskin**

Head of Real Estate, SVP Investments  
philip.kroskin@sunriseseniorliving.com  
571.279.1918

**Sunrise Senior Living**

7902 Westpark Drive  
McLean, VA 22102

LETTER OF TRANSMITTAL





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## Qualifications and Experience

# About Sunrise

**Sunrise Senior Living is a senior care leader and world-class management company, serving approximately 21,000 residents across more than 250 communities in the United States and Canada.**

Sunrise provides a full spectrum of senior living and care, including independent living, assisted living, memory care, skilled nursing, and short-term stays. In addition to its operational expertise, Sunrise has developed and built the majority of the communities it manages, bringing deep experience in ground-up senior living development. Each community is thoughtfully designed to support a high quality of life, with a personalized approach to care and lifestyle. Residents enjoy vibrant programming, exceptional dining, an active social environment, and pet-friendly policies— all fostering a sense of purpose, independence, and meaningful connection.



*To champion quality  
of life for all seniors.*

Sunrise Senior Living Mission Statement

44+

years of experience

21,000+

residents served

250+

senior living communities

\$2.1B

active development

\$9B

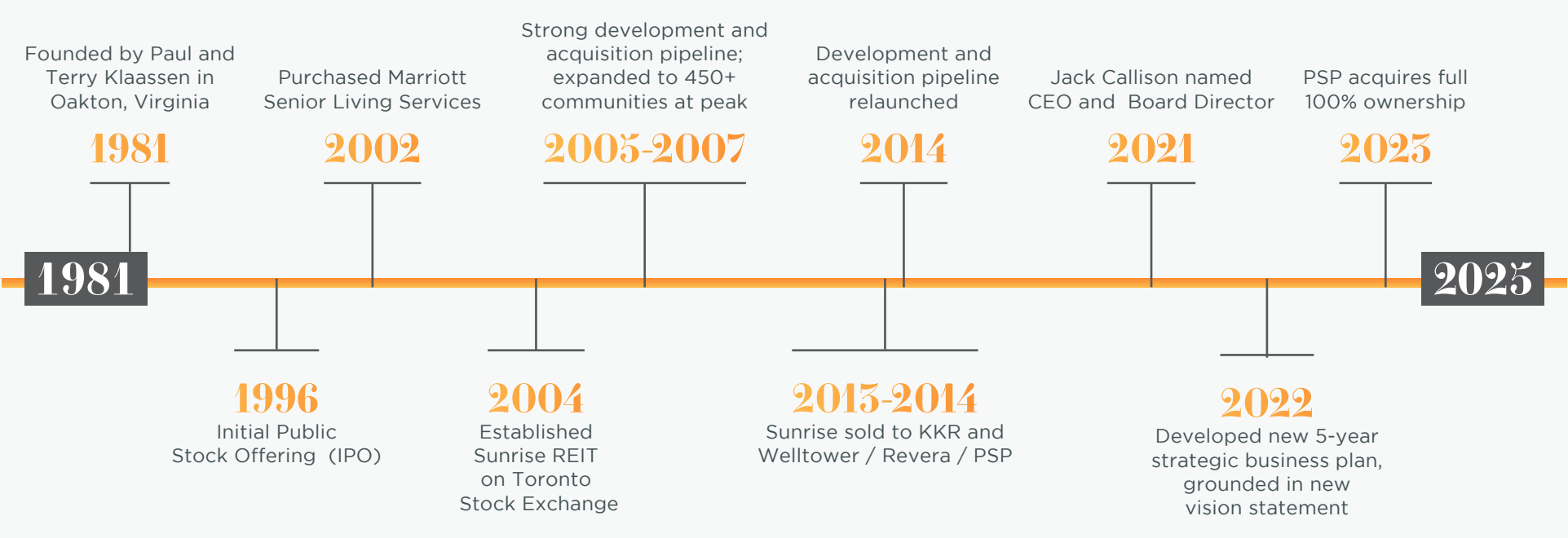
assets under management



QUALIFICATIONS AND EXPERIENCE



# Sunrise: Leading the Industry for Over Four Decades

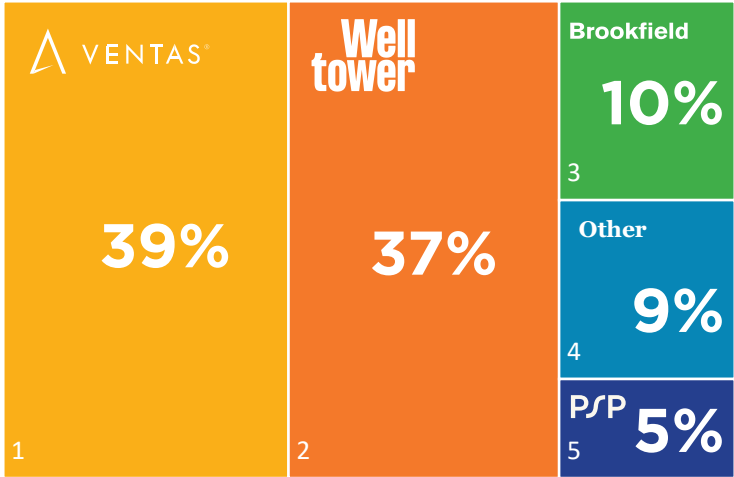


## TRACK RECORD OF EXCELLENCE

- Full-service property manager and developer, offering a premium product of resident-centered services for seniors at 250+ communities.
- High-quality, purpose-built, premium communities located in top metropolitan markets.
- Leading brand, reputation, and senior living expertise.
- Serves 21,400+ residents and employs 18,500+ team members.
- 2nd largest AL/MC provider and 6th largest senior housing operator
- Recognized as a Certified Great Place to Work seven times.
- Achieved WELL Safety Rating at scale for second consecutive year, demonstrating organization's dedication to creating healthy living environments
- Best in Class: Over half of Sunrise-managed properties were named by U.S News and World Report for Best of Senior Living for 2023 and 2024.
- Won Environments for Aging Design Champions and Senior Housing News Architecture & Design Awards in 2023.



## INSTITUTIONAL PARTNER



## QUALIFICATIONS AND EXPERIENCE

# Sunrise Achievements

## American Health Care Association/National Center for Assisted Living Quality Awards

- #2 Assisted Living/Memory Care operator in North America
- #6 overall for Senior Housing, and Top Senior Housing Developer.
- Over half of Sunrise-managed properties were named by U.S News and World Report for Best of Senior Living for 2023 and 2024.
- Recognized as a Certified Great Place to Work seven times.
- Won Environments for Aging Design Champions and Senior Housing News Architecture & Design Awards in 2023.
- Since 2015, 13 Sunrise communities in the Los Angeles market have received a combined total of **25 Quality Awards** from the American Health Care Association/National Centers for Assisted Living (AHCA/NCAL).



## Recognized by Great Place to Work in 2021

- The For All Methodology builds on the Trust Model by ensuring that every single employee, no matter who they are or what they do for their company, has a consistently positive experience at work.
- Great Workplaces For All are able to maximize their human potential through effective leaders, meaningful values, and a deep foundation of trust with all employees. When those are in place, these workplaces benefit from improved innovation and financial growth.
- For All means everybody can create, everybody is connected, and everybody can contribute their best.



## Alzheimer's Association®

- Sunrise's memory care training designed for team members was recognized by the Alzheimer's Association® (AAIC) in 2020.
- According to the certification statement from the AAIC, our training was recognized for "incorporating the evidenced-based Dementia Care Practice Recommendations in the following topic areas: Alzheimer's and dementia, person-centered care, assessment and care planning, activities of daily living, and behaviors and communication."





# About KTGy

## Who We Are

Founded in 1991, we are an award-winning design firm of architects, designers and planners that realize new possibilities through inspired design. Everything we do, from architecture and interior design to branded environments and urban design is based on a people-centric storytelling and design process that creates memorable experiences nationwide. Guided by our mission to bring innovative design to all people and places, we partner with our clients to envision spaces that make a positive impact on people and their communities.

## DESIGN LIVES AT KTGy.

*We are experts in how people live.*



Sunshine Senior Living | Beach Cities Health District

## VISION

*We see a world alive with design possibilities that create thriving environments.*

## MISSION

*To bring innovative design to all people and places.*

## What We Do

KTGy realizes new possibilities for people through four complementary areas of design. This palette of services empowers our clients to realize bold new visions for flourishing environments. From visioning and entitlement through design and construction. From brand identity to spatial planning and finishes, our experts understand how people live and how destinations are created, experienced and reimagined.

## What Sets Us Apart

Passion, curiosity and partnership drive us. Collaboration brings us together weaving between practices and specialties, we draw on strengths from across the firm to provide inspired design and expert execution. KTGy's expertise stems from our diverse skills and passions, branching into four main services: architecture, interior design, branded experiences and urban design.

## Our Expertise

*Architecture  
Interior Design  
Branded Environments  
Urban Design*

34

Years Since we  
Opened Our  
Doors for Business

1,058

Total Awards Won

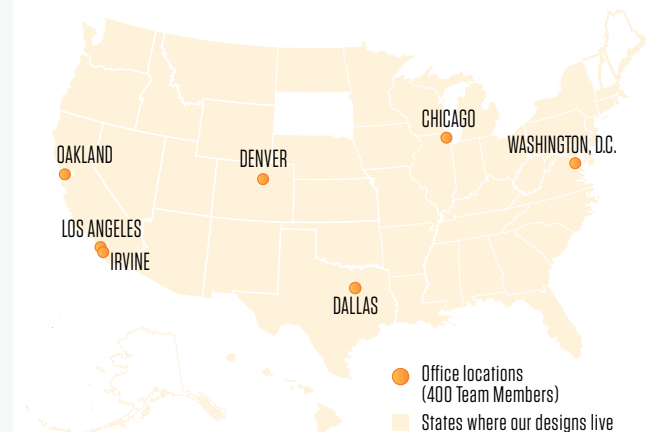
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Ranking in the  
Architecture Record  
Top 300 Architecture  
Firms

19

Ranking on Interior  
Design's Rising Giants

## Where We Are & Work



## Our Services

### ARCHITECTURE

We design vivid, inspiring places rooted in the new ways people want to live, imbuing structure with meaning and making concepts reality.

### BRANDED ENVIRONMENTS URBAN DESIGN

Evocative, consistent storytelling separates notable brands from mere businesses. Our strategy uncovers that story.

### INTERIOR DESIGN

Artful interiors are born out of experiential design. A thoughtful transformation of bare space into an environment that engages the senses and transports the individual.

### URBAN DESIGN

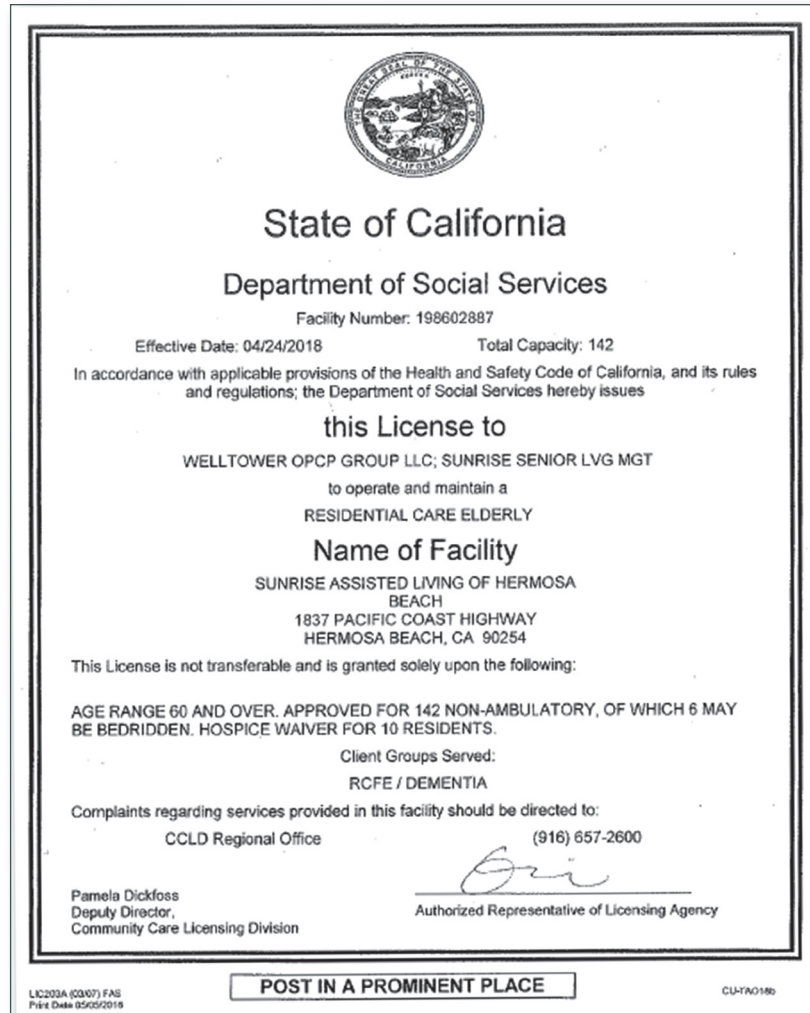
Drawing out the limits of possibility; urban design prepares the way for future development, creating outlines that people aspire to fill.

## QUALIFICATIONS AND EXPERIENCE

# Relevant Licenses and Certificates

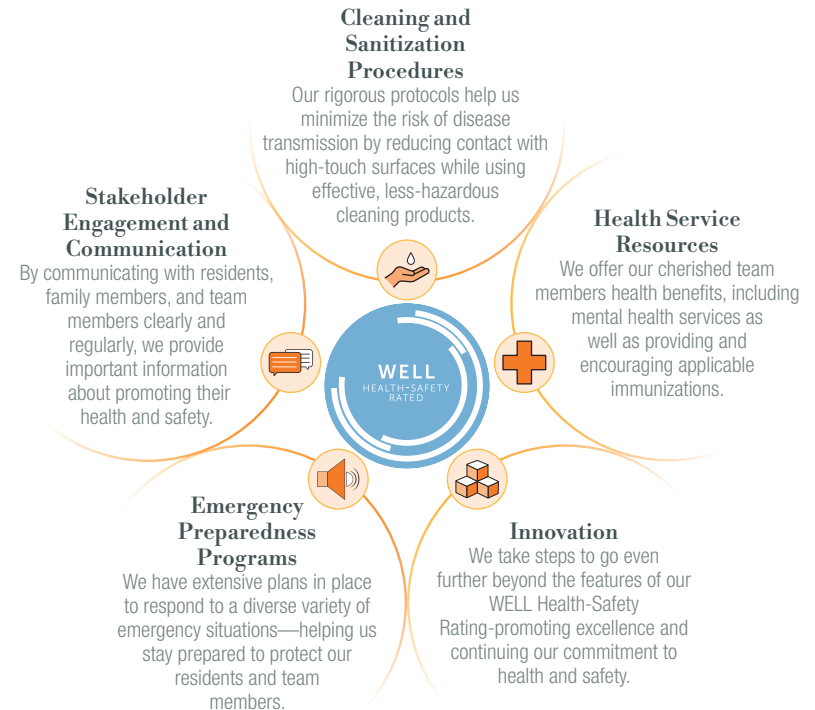
## Licensure

- Proof of Sunrise qualifications to operate an RCFE Building with Assisted Living and Memory Care components (ref: Sunrise of Hermosa Beach)



## Our Dedication to Health and Safety

*Sunrise is the largest senior living provider to achieve the prestigious WELL Health-Safety Rating for our efforts to promote health, safety, and well-being at scale.*



## Sustainability and Wellness



### Energy Efficiency

Several Sunrise communities have awarded LEED certification, including Sunrise of Huntington, NY. All Sunrise new builds are LEED certifiable



### Energy Star Certification

All Sunrise communities are entered into the EPA's Energy Star program, and in 2024, 40 communities were awarded certification.

Sunrise of Windsor was also awarded the prestigious 2024 Energy Star Canada Award for Building of the Year – Senior Living Community and Residential Care Facility.

# Project Team Overview



**Philip Kroskin**  
Head of Real Estate  
SVP Investments  
**Senior Housing & Retail Real Estate**



**Joel Warsh**  
Senior Director of  
Real Estate Development  
**Senior Housing & Multifamily**



**Andy Coelho**  
Senior Vice President,  
Construction  
**Senior Housing**



**Damien O’Riordan**  
Vice President of Operations,  
Independent Living  
**Senior Housing & Hospitality**



**Joel Miller**  
Senior Director of Construction  
**Senior Housing & Mixed Use**



**Veronika Ruff**  
Vice President of Construction  
**Senior Housing & Hospitality**



**John R.P. Walker**  
Development Design Director  
**Senior Housing**



**Nami Harbuz**  
Financial Analyst  
**Senior Housing & Retail**



**Ben Seager**  
Principal  
**AIA, LEED AP**



**Sarah Sindian**  
Principal  
**AIA, NCARB**



**Josefine Fabricius**  
Senior Designer



# Project Team Overview



**Philip Kroskin**

Head of Real Estate, SVP Investments  
**Senior Housing & Retail Real Estate**

Philip Kroskin is a seasoned real estate executive with more than 25 years of leadership experience across acquisitions, development, asset management, joint ventures, and feasibility strategy. His deep expertise lies particularly in the senior housing and retail sectors, with a strong geographic focus on key West Coast markets including Oceanside, Orange, and Manhattan Beach. As SVP of Investments and Real Estate at Sunrise Senior Living, he is responsible for advancing the company's growth through strategic development and acquisitions. Previously, he played a pivotal role in leading Sunrise's asset restructuring initiatives, addressing operational inefficiencies and deferred maintenance while supporting long-term value creation. With additional experience in advisory, analytics, and project execution across private equity and public REIT environments, Philip is known for his ability to build high-trust relationships from site-level teams to institutional investors, while driving sustainable, stakeholder-aligned outcomes.

**Education:**

- Master of Urban and Environmental Planning, University of Virginia (1991-1992)
- Bachelor of City Planning / Architecture, University of Virginia (1987-1991)



**Joel Warsh**

Senior Director of Real Estate Development  
**Senior Housing & Multifamily**

Joel Warsh is a seasoned leader in real estate development with over a decade of experience in senior housing and high-value multifamily communities throughout the Western United States. As Senior Director of Real Estate Development at Sunrise Senior Living, he leads site acquisition, entitlements, and development strategy, focusing on purpose-built communities aligned with Sunrise's mission. Prior to joining Sunrise, Joel held senior development roles at Ryan Companies and JPI Companies, where he managed more than \$1 billion in ground-up urban and mixed-use projects. His expertise encompasses the full real estate lifecycle, including land use planning, public-private partnerships, and delivering senior living communities within complex regulatory frameworks.

**Education:**

- Bachelor of Science in Business Administration (Management) - San Diego State University
- Certificate in Real Estate Finance, Investments, and Development - University of San Diego



**Andy Coelho**

Senior Vice President, Construction  
**Senior Housing**

Andrew Coelho is a seasoned architecture and construction executive with three decades of experience managing high-value senior living projects across the United States. He oversaw the construction of various projects in California including Sunrise of Beverly Hills, Santa Monica, Orange, and Manhattan beach. As Senior Vice President at Sunrise Senior Living since 2004, he leads both the Construction Management and Interior Design teams—overseeing end-to-end processes from permitting and budgeting to FF&E procurement and installation for over 250 properties. His prior roles included managing architectural projects with a focus on senior living, hospitality, and federal buildings, with increasing leadership responsibility and expertise in construction administration, quality control, and feasibility analysis. A registered architect and bilingual in Spanish, Andrew is known for integrating high standards of design with operational efficiency.

**Education:**

- Master of Architecture, University of Texas at Austin, 1995
- Bachelor of Arts in Architecture, Washington University in St. Louis, 1992

# Project Team Overview



**Joel Miller**

Senior Director of Construction  
**Senior Housing & Mixed Use**

Joel Miller brings over 24 years of construction leadership experience, managing more than \$1 billion in project volume across 4.5 million square feet. Currently Director of Construction West coast projects for Sunrise Senior Living, Joel ensures timely, budget-conscious, and high-quality execution of new developments and renovations. Formerly a senior leader at James G. Davis Construction Corporation, he spearheaded award-winning commercial and institutional projects—ranging from high-end urban infill to large federal complexes—while also mentoring large multidisciplinary teams. His ability to align technical precision with stakeholder collaboration makes him a valuable asset in delivering complex, mission-driven developments.

**Education:**

- Master of Science in Environmental Engineering, Pennsylvania State University, 1999
- Bachelor of Science in Environmental Resource Management, Pennsylvania State University, 1997



**Veronika Ruff**

Vice President of Construction  
**Senior Housing & Hospitality**

Veronika Ruff is a construction management executive with over 25 years of experience delivering complex projects across the hospitality, resort, residential, retail, and senior living sectors. As Vice President of Construction Management at Sunrise Senior Living, she leads a national team of construction managers responsible for building thoughtfully designed communities that exceed resident and family expectations. Her career includes leadership roles at Marriott International and Starwood Hotels & Resorts, where she managed project execution across multiple global brands and oversaw significant renovations, new builds, and brand-driven design implementations. Known for her strategic acumen and ability to navigate matrix organizations, Veronika excels in delivering results across the full project lifecycle—from conceptual planning to construction closeout—with a strong focus on operational efficiency and stakeholder alignment.

**Education:**

- Master of Science in Engineering, Construction Management – Northwestern University, 2000
- Bachelor of Science in Engineering, Civil/Structural Engineering – Princeton University, 1996



**John R.P. Walker**

Development Design Director  
**Senior Housing**

John Walker is a veteran architect with over 30 years of international expertise in designing and developing senior living communities. As Development Design Director at Sunrise Senior Living, he leads schematic design and ensures architectural standards across projects. His prior experience spans roles in the U.S., UK, and Germany, including as a consulting architect and senior associate responsible for feasibility planning, design reviews, and international project execution. John's unique blend of design sensitivity, operational insight, and deep specialization in dementia care and senior housing positions him as a key thought leader in the field.

**Education:**

- Bachelor of Architecture, Virginia Polytechnic Institute and State University, 1991
- Professional Certificate: American Institute of Architects (AIA), 1995
- Licensed Architect – Commonwealth of Virginia, 1996
- Harvard University: Design for People with Alzheimer's and AIDS, 1998

# Project Team Overview



**Damien O'Riordan**

Vice President of Operations, Independent Living  
**Senior Housing & Hospitality**

Damien O'Riordan is a seasoned hospitality operations leader with over 25 years of executive experience spanning luxury hotels and senior living. Currently serving as Vice President of Operations, Independent Living at Sunrise Senior Living, Damien oversees performance and service excellence across a national portfolio of communities. Prior to this, he held senior leadership roles at Encore Boston Harbor and The Ritz-Carlton, where he led large multidisciplinary teams across diverse business units. His operational expertise includes rebranding initiatives, workforce engagement, revenue growth, and customer experience strategy. Recognized for building high-performing cultures, Damien has consistently delivered measurable gains in satisfaction, profitability, and brand standards across international markets.

**Education:**

- Diploma in Hospitality Management, Galway-Mayo Institute of Technology (1993-1996)



**Nami Harbuz**

Financial Analyst  
**Senior Housing & Retail**

Nami Harbuz is a real estate financial analyst with cross-functional expertise spanning architecture, construction, and real estate finance. At Sunrise Senior Living, she supports investment decisions across the development and acquisitions pipeline, applying a multidisciplinary lens to underwriting, feasibility, and project strategy. Her previous roles at Lidl US and Norton Scott focused on development analytics, project coordination, and contract negotiation, equipping her with hands-on experience in both preconstruction and financial modeling. Nami's unique blend of design insight and financial rigor enhances Sunrise's ability to evaluate and deliver mission-aligned senior housing communities.

**Education:**

- Master of Professional Studies, Real Estate Finance – Georgetown University
- Bachelor of Fine Arts, Interior Architecture and Design – Virginia Commonwealth University



# Project Team Overview



**Ben Seager**

Principal  
AIA, LEED AP

Ben Seager, AIA, LEED AP, has been involved in the design, planning and entitlement of a wide variety of residential, mixed-use and senior housing communities nationwide for 20 years. In 2017 he was tapped to lead KTGy's Senior Living Practice Group, and since that time his sole focus has been on senior living, including Active Adult, Independent Living, Assisted Living, and Memory Care.

Ben is responsible for setting project direction during conceptual site planning, overseeing schematic design, and coordinating with the technical team during the design development and construction document phases. Ben's strong commitment to client satisfaction is evident by his careful management of each project through schematic design in order to ensure the design vision is realized. His creativity and unwavering focus have led to many successful and award-winning communities.

#### Education:

- Bachelor of Architecture  
California Polytechnic State University  
San Luis Obispo, CA



**Sarah Sindian**

Principal  
AIA, NCARB

Sarah Sindian brings over 20 years of experience to KTGy. Since joining KTGy in early 2003, she has managed a variety of projects from single family dwellings to high density podium buildings, urban infill residential and mixed-use developments. With work extending from southern California to northern California, she understands the complexities associated with differing regions and jurisdictions. Her portfolio includes many successfully built projects that have benefited from her dedication and problem-solving skills.

Sarah offers an understanding of the project development process that is critical to executing a project from design development through construction documents. She is committed to carrying out a project that meets code compliance, while refining the design in the process and maintaining original design intent. Her belief that successful projects are the result of team collaboration helps her excel in fulfilling client needs, on time and within budget.

#### Education:

- Bachelor of Science in Architecture  
California State Polytechnic University  
Pomona, CA



**Josefine Fabricius**

Senior Designer

Josefine Fabricius is a designer known for her ingenuity in integrating local context into her designs. She specializes in crafting innovative, upscale senior housing communities across California. Her expertise extends to multifamily developments, with a keen focus on catering to the unique needs of residents in all stages and phases of life.

Josefine strives for alignment with local design preferences, even in the most challenging environments. From urban to rural settings, her portfolio displays a diverse array of projects that prioritize both functionality and aesthetic appeal. With ten years of industry experience and a comprehensive understanding of the design needs within active adult, independent living, assisted living, and memory care communities, she consistently delivers exceptional designs that elevate the standard of senior living.

#### Education:

- Bachelor of Architecture  
California State Polytechnic University  
Pomona, CA

# Project Management Approach

*Sunrise brings a vertically integrated approach to senior housing development, combining in-house project management expertise with decades of operational experience. Unlike firms that solely develop or operate properties, Sunrise builds and operates its own communities, ensuring alignment between design intent, construction quality, and long-term service delivery.*

From predevelopment through stabilized occupancy, Sunrise’s project management team oversees every phase of the process, including:

- 

Site planning and entitlement coordination
- 

Capital raise and financing
- 

Design and consultant team management
- 

Construction oversight and schedule adherence
- 

Cost estimating and value engineering
- 

Licensing, staffing, and operational ramp-up

This end-to-end accountability minimizes hand-off risk, fosters efficiency, and ensures that operational considerations are baked into every design and construction decision. The result is a higher-performing built environment tailored to resident needs, regulatory standards, and evolving health care models.

With a proven track record across ground-up and repositioning projects, Sunrise’s project management team has delivered communities on time and on budget, while consistently meeting or exceeding resident satisfaction and financial performance benchmarks. We are able to take the feedback and lessons learned from every previous project and apply them to the next. This approach enables us to continuously improve by aligning with market demands, addressing resident needs, enhancing staffing efficiency, and optimizing overall performance. Our project delivery framework embeds this continuous learning cycle, helping to refine design standards, streamline construction processes, and elevate the resident experience with each new community we develop.



QUALIFICATIONS AND EXPERIENCE

# 4

## Case Studies of Similar Projects



# Case Study



**Project Type:**  
Assisted Living and Memory Care

**Project Size:**  
88 units, 1.22 acres

**Project Cost:**  
\$131.2 Million

**Property Management Structure:**  
In-House

**Equity Participation:**  
Tax Exempt Bond Financing

**Services:**  
Entitlements, Development,  
Construction Management,  
Operations



## Sunrise of Manhattan Beach

**Sunrise of Manhattan Beach is a premier, three-story, 88-unit senior living community currently under construction on ground leased land along the iconic Pacific Coast Highway in Manhattan Beach, California.**

This community is one of the only rental senior living communities in the country financed through tax-exempt bonds. It includes approximately 79,763 square feet and features 54 Assisted Living units, 34 Memory Care units, and underground parking, all situated on a 1.22-acre site.

The community is being developed with a strong emphasis on architectural elegance and functional design. Residents will enjoy light-filled interiors, landscaped courtyards, and outdoor dining patios that foster connection and well-being. Programming will include a robust calendar of wellness and enrichment activities from fitness classes and educational lectures to music performances and local outings designed to promote lifelong engagement and holistic health.

Dining will be a cornerstone of the resident experience, with meals crafted by a professional culinary team to balance nutrition, flavor, and hospitality. Personalized care plans and a warm, service-oriented culture will ensure that each resident receives the support they need to thrive. With capacity for over 130 residents, Sunrise of Manhattan Beach represents a forward-thinking model for senior living. It exemplifies how innovative financing, thoughtful design, and personalized care can come together to create a vibrant, purpose-driven community for older adults.

# Case Study

**Project Type:**

Independent Living, Assisted Living and Memory Care

**Project Size:**

178 units, 0.82 acres

**Project Cost:**

\$219 Million

**Property Management Structure:**

In-House

**Equity Participation:**

Joint Venture with Lincoln Property Company

**Services:**

Entitlements, Development, Construction Management, Operations



## Sunrise of Wilshire

**Sunrise of Wilshire is a landmark senior living development uniquely situated between the vibrant communities of Westwood and Beverly Hills in Los Angeles.**

Located at 10354 Wilshire Boulevard on a ground lease, the project will transform a currently vacant 40-unit apartment building into a 20-story, full-service senior living community. The development will include 178 senior residences, comprising 100 ultra-luxury independent living units, 48 assisted living units, and 30 memory care units. An adjacent 4-story building at 10341 Ashton Avenue will provide 36 income-restricted apartments, reinforcing the project's commitment to both luxury and affordability.

The community is designed to meet the growing demand for high-quality senior housing in Los Angeles while preserving the historic character of the surrounding neighborhood. It will feature expansive wellness and fitness areas, multiple restaurants and bars, an art studio, a salon, and 192 subterranean parking spaces.

A defining feature of this initiative is the co-GP partnership between Sunrise Senior Living and Lincoln Property Company (LPC). Over the past two years, Sunrise and LPC have cultivated a strategic relationship to co-develop senior housing projects across key markets. LPC, one of the largest privately held real estate firms in the U.S., brings deep development expertise and a national footprint, managing over 489 million square feet of real estate and having developed more than \$22 billion in commercial projects in the past five years.

This collaboration allows Sunrise to leverage LPC's capital strength and development infrastructure while maintaining its leadership in senior care operations. Together, Sunrise and LPC are setting a new standard for urban senior living—blending luxury, affordability, and care in one of the most desirable corridors in Los Angeles.

### CASE STUDIES OF SIMILAR PROJECTS



# Case Study



**Project Type:**  
Assisted Living and Memory Care

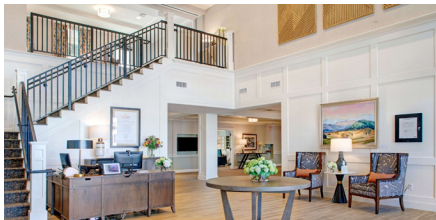
**Project Size:**  
92 units, 1.55 acres

**Project Cost:**  
\$90 Million

**Property Management Structure:**  
In-House

**Equity Participation:**  
100% equity contributed by Sunrise's parent company

**Services:**  
Entitlements, Development, Construction Management, Operations



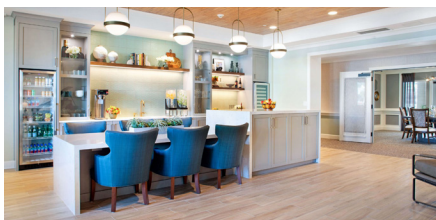
## Sunrise of Orange

Sunrise of Orange is a newly opened senior living community located in the heart of Orange, California. This contemporary two-story residence features 92 units and offers Assisted Living and Memory Care services, thoughtfully designed to support the evolving needs of older adults.

The 75,000-square-foot property features a blend of elegant interiors and vibrant outdoor spaces. Residents enjoy a variety of amenity-rich environments, including a lively multi-purpose bistro, elegant dining rooms, an onsite spa and salon, and two beautifully landscaped courtyards with accessible furniture for lounging and dining. The dining experience at Sunrise of Orange is crafted with care. A skilled culinary team prepares fresh, nutritionally balanced meals tailored to resident preferences, offering restaurant-style service in an environment that prioritizes both health and hospitality.

Rooted in Sunrise's commitment to comfort and purposeful living, the community is thoughtfully designed with inviting, sunlit interiors and secure outdoor spaces that foster both independence and connection. Residents benefit from a rich calendar of wellness-oriented programming — from fitness and art classes to music performances, educational talks, and outings to nearby cultural sites — all aimed at nurturing holistic well-being and social engagement.

With the ability to accommodate over 116 residents, Sunrise of Orange exemplifies the future of senior care. It blends personalized support, elegant design, and vibrant programming to enable residents to thrive physically, mentally, and socially. The community also contributes meaningful perspectives to the fields of gerontology, caregiving, design, and community health — offering a model for how senior living can elevate individual lives and support healthy aging across generations.



### CASE STUDIES OF SIMILAR PROJECTS



# Case Study

**Project Type:**

Assisted Living, Memory Care, and Independent Living

**Project Size:**

206 units on a combined campus

**Property Management Structure:**

In-House

**Equity Participation:**

Owned by Welltower; operated by Sunrise Senior Living

**Services:**

Operations, Asset Management, Resident Programming



## Sunrise of Flat Iron

Sunrise at Flatirons is a flagship senior living community located in Broomfield, Colorado, strategically positioned between Denver and Boulder with panoramic views of the Flatiron Mountains. This vibrant community spans a combined campus model and provides a full continuum of care, including 52 Assisted Living units, 24 Memory Care units, and 130 Independent Living apartments, offering choice and flexibility for residents as their needs evolve.

The thoughtfully designed property supports over 200 residents across three care levels, with spacious apartments, well-appointed common areas, and secure outdoor courtyards. Interior spaces reflect warmth and comfort, blending natural Colorado-inspired aesthetics with Sunrise's signature hospitality.

Residents benefit from robust wellness offerings that promote independence and vitality, including daily exercise classes, local excursions, educational seminars, and intergenerational programs. Onsite amenities include a restaurant-style dining room, casual bistro, salon, fitness center, and activity studios that support both cognitive and physical engagement.

The dining program is a cornerstone of community life, offering fresh, chef-prepared meals tailored to individual preferences and dietary needs. With an emphasis on nutrition, taste, and social dining, the culinary team delivers meals that nourish body and spirit alike.

Operationally, Sunrise at Flatirons continues to perform with strong occupancy and rate metrics.

Its enduring success showcases the value of integrated care, purpose-driven design, and lifestyle programming in elevating the aging experience.



A large, stylized white number 5 with a horizontal bar across its middle, set against an orange background with a sunburst graphic in the bottom left corner.

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# Development Vision & Concept



# Proposed Use Types

The proposed development will offer a full continuum of senior living care, with 200+ units of Independent Living (IL), Assisted Living (AL), and Memory Care (MC), thoughtfully designed in accordance with California healthcare regulations and licensure standards. All licensed components will meet Residential Care Facility for the Elderly (RCFE) requirements and will emphasize a non-institutional, wellness-focused residential model that supports resident autonomy and dignity.

This use is consistent with BCHD’s rights and obligations as a California healthcare district.



**200+**  
RENTAL SENIOR  
HOUSING UNITS



DEVELOPMENT VISION & CONCEPT



# Planning/Design Approach

The architectural strategy centers on a campus-style layout that emphasizes connectivity, daylight access, and biophilic principles. Buildings are arranged to preserve key view corridors and maximize natural ventilation. Landscaped courtyards and walkable internal streets link residential, wellness, and amenity zones.

Illustrative site plans highlight key design elements, such as:

- A central wellness spine with direct pedestrian access
- Outdoor terraces and roof gardens programmed for social engagement

## ASSISTED LIVING AND MEMORY CARE SIDE

- 1 Rooftop Terrace
- 2 Courtyard Space
- 3 Multiple Dining Services
- 4 Garden Area at Entrance (optional)



DEVELOPMENT VISION & CONCEPT



# Planning/Design Approach

The project will include two 5-story buildings for IL and AL/MC use, plus 1-story duplex cottages. A porte cochère marks the formal entry, preserving medical office structures and a parking facility. Renderings reflect a modern architectural expression with warm materials and landscaped edges.

The plan also introduces a welcoming entry experience at the Assisted Living/Memory Care (AL/MC) building, with a thoughtfully designed and

inviting approach. This entry sequence is intended to create a sense of arrival that is warm, dignified, and accessible for residents and visitors alike. Toward the rear of the site, the Independent Living (IL) component forms a vibrant residential hub, anchored by a circular vehicular drive that enhances convenience, circulation, and access while promoting a village-like atmosphere.



DEVELOPMENT VISION & CONCEPT



# Blue Zones and Sustainability Alignment

Blue Zones principles into the planning and design of our communities to promote longevity, purpose, and holistic well-being. Integration of Blue Zones Principles. This includes creating walkable site plans that encourage daily movement, incorporating nature and outdoor spaces to support relaxation and connection, and designing with social engagement in mind through communal dining and flexible gathering spaces.

- **Walkable site design** to encourage daily natural movement
- **Access to nature** and outdoor spaces for relaxation and well-being
- **Flexible communal spaces** to foster social connection and engagement
- **Purpose-driven programming** including resident-led activities and volunteer opportunities
- **Support for spiritual and emotional wellness** through holistic offerings

Sustainability is a core consideration in Sunrise's development approach, shaping decisions from early design through long-term operations. We prioritize strategies that reduce environmental impact, enhance energy efficiency, and promote resident well-being, such as optimizing building orientation for natural light, integrating high-performance systems, and selecting low-impact materials. Where feasible, we target certifications like LEED and/or WELL and collaborate closely with consultants to meet or exceed local sustainability mandates. Our operational model reinforces these commitments through waste reduction, water conservation, and ongoing performance monitoring, ensuring our communities remain environmentally responsible and resilient over time.





# Conceptual Financing Structure

Historically, Sunrise has anticipated a 65–75% debt structure on development projects.

The remaining 25–35% of project capital is generally funded through a combination of General Partner (GP) and Limited Partner (LP) equity. Sunrise, as the General Partner, will fund pre-development costs and will commit to funding the required GP equity and sourcing the required LP equity. With a longstanding track record and strong relationships across a broad network of capital partners, the team has successfully led numerous senior housing developments nationwide.

## Bond Financing

Alternatively, the development team has also successfully employed **tax-exempt bond financing**, which involves selling bonds to finance up to 100% of the project cost, thereby eliminating the need for traditional equity in those cases.

Sunrise remains actively engaged with tax-exempt bond partners. Recently, the company raised \$131.2 million for its Manhattan Beach project, which began construction in February 2025, and raised \$80M for its Long Beach project which will begin construction in August 2025. Sunrise is also actively pursuing bond financing for additional projects in its development pipeline.

For this project, Sunrise is well-positioned to adapt to evolving economic conditions. The team can strategically adjust its approach by modifying leverage levels, utilizing tax-exempt financing vehicles, or prioritizing equity fundraising efforts that align with investor preferences and interest rate trends.

Sunrise has maintained a robust development pipeline even during periods of market disruption, including the post-COVID recovery, demonstrating both financial discipline and strategic agility.

# Revenue Sharing Strategy

Sunrise remains open to the possibility of a revenue-sharing arrangement; however, the final structure and viability will be assessed during the RFP phase.



DEVELOPMENT VISION & CONCEPT



# Challenges and Mitigation Strategies

## Key considerations include:

- Community sensitivity addressed through massing transitions and compatible architecture
- Traffic and access supported by surface stalls and TDM analysis
- Operational coordination clarified through governance protocols for BCHD-shared spaces

# Unique/Innovative Development Approach

## The project reimagines senior housing as a comprehensive wellness ecosystem. Key innovations include:

- Co-location of health and residential uses within a unified campus
- Hospitality-inspired design promoting dignity and comfort
- Flexible infrastructure designed to support future technologies
- Public-facing wellness components like teaching kitchens and outdoor fitness zones
- Enhanced greenery and landscape elements at the main entry, creating a therapeutic and welcoming arrival experience
- Environmental responsiveness with shaded walkways and roof gardens
- Shared-space governance models enabling future reprogramming by BCHD





# Sunrise's Integrated Healthcare Partnerships

Sunrise has cultivated a robust and growing network of partnerships with leading healthcare systems and academic research institutions across the United States and Canada. These collaborations are designed to enhance resident care by integrating clinical insight, wellness programming, and coordinated health services directly into our communities.

In Southern California, Sunrise's strongest relationship has been with Dignity Health and CommonSpirit Health, where we've collaborated closely with their Community Health Team to align programming, improve care transitions, and enhance community outreach. Additionally, our regional team is actively expanding partnerships with USC, UCLA, and Kaiser Permanente. Our focus continues to be on extending support beyond hospital discharge and routine doctor visits, helping to ensure seniors experience seamless, integrated care pathways that promote continuity, reduce avoidable readmissions, and enhance overall well-being.

These relationships are grounded in a shared mission and a commitment to long-term partnership. They include a wide range of activities, from research collaborations focused on wellness, nutrition, and lifestyle interventions to regular care coordination with hospital leadership and specialty teams.

By embedding itself within local healthcare ecosystems, Sunrise delivers holistic, person-centered care that enhances resident outcomes and creates lasting value for the communities we serve.

Across our portfolio, Sunrise has established partnerships with the following health providers:



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## Required Disclosures



# Disclosure: Respondent and Parent Company

## 3.4 Required Disclosures

**3.4.1** A disclosure of the Respondent's name and address and, as applicable, the name and address of any company or venture that owns or has a majority stake in the firm, and the names of its key principals, officers and directors.

Sunrise Senior Living is owned by Revera Inc., which is owned by PSPIB. PSPIB is a Crown Corporation which is a form of corporation that is created and governed by legislation of the Canadian Government. PSPIB was established by the government to manage employer and employee contributions made after April 1, 2000 to the Federal Public Service, the Canadian Forces and the Royal Canadian Mounted Police pension funds. Revera and Sunrise (through Revera) are two of their many investments.

**Sunrise Senior Living**  
**7902 Westpark Drive**  
**McLean, VA 22102**

**Revera Inc.**  
**Bay-Adelaide Centre**  
**22 Adelaide Street West, Suite 2010**  
**Toronto, ON M5H 4E3**

**PSPIB**  
**1250 René-Lévesque Boulevard West**  
**Suite 1400**  
**Montréal, QC H3B 5E9**

**3.4.2** Provide information regarding any major contract that had been terminated for any reason within the last 5 years, involving the Respondent and any of its key team members.

**Sunrise has not terminated any land leases in the last 5 years.**

**3.4.3** Identify any conflicts of interests of the Respondent, proposed subcontractors and key team members and affiliates with BCHD or its affiliates, or any of BCHD's employees or Board members, currently or any foreseen in the future.

**Sunrise is not aware of any actual or potential conflicts of interest involving our organization, proposed subcontractors, key team members, or affiliates with Beach Cities Health District (BCHD), its affiliates, employees, or Board members, either currently or foreseeably in the future.**



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## Proof of Insurance



## Workers' Compensation | General Liability \$2M

Holder Identifier :Certificate No.:

# Thank You



**Sunrise Senior Living**

7902 Westpark Drive  
McLean, VA 22102

Federal ID #: 62-1247513