



Outlook

Fw: Rules Committee: 5/6/26 — Item C.2

From City Clerk <city.clerk@sanjoseca.gov>**Date** Wed 5/6/2026 8:30 AM**To** Rules and Open Government Committee Agendas <rulescommitteeagenda@sanjoseca.gov>

1 attachment (518 KB)

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From: brian darby [REDACTED]**Sent:** Wednesday, May 6, 2026 12:41 AM**To:** City Clerk <city.clerk@sanjoseca.gov>**Subject:** Rules Committee: 5/6/26 — Item C.2

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Subject: Proposal: Comprehensive Resource Rubric for Manufactured Housing Solutions

Dear Members of the Rules and Open Government Committee,

I am attaching a draft resource document and evaluative rubric regarding emergency, temporary, and long-term manufactured housing solutions. This document is intended to support the City's ongoing efforts to expand housing availability and streamline the development process within San Jose.

The attached draft categorizes various organizations and manufacturers involved in the production and development of manufactured housing. To make this resource useful, I've included relevant policy memos and recent work analyses in a structured rubric. This framework not only identifies key providers but also distinguishes between those who physically produce units and those who specialize in site development.

Key features of this proposal include:

- **Methodological Transparency:** A clear explanation of the ranking system and the criteria used to evaluate each entity.
- **Diverse Housing Types:** Coverage ranging from rapid-response emergency shelters to permanent manufactured residential structures.

- **Strategic Categorization:** Data organized to assist city planners and policymakers in identifying the most effective partners for specific urban housing goals.

While this remains a working draft, I believe it addresses a critical component of our local housing strategy. I would welcome the opportunity to have this analysis considered by the Committee as you evaluate innovative solutions for housing development in San Jose and neighboring jurisdictions. Thank you for your time and for your continued dedication to our community's needs.

Sincerely,
Brian Darby

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Prefab, Modular & Factory-Produced Housing Structures

Permanent, Transitional, and Emergency Housing Options for San José

Prepared for:

Rules and Open Government Committee — City of San José

Submitted by:

Vice Mayor Foley | Councilmember Ortiz | Councilmember Tordillos | Councilmember Candelas

Rules Committee: 5/6/26 — Item C.2 | Reference: 04/22/26 Item C.4 | Briefing Memo: 04/28/2026

SECTION 1: LEGISLATIVE CONTEXT & POLICY DIRECTIVES

1.1 Council Memorandum — April 16, 2026

FROM: Vice Mayor Foley | Councilmember Ortiz | Councilmember Tordillos | Councilmember Candelas

TO: Rules and Open Government Committee

Rules Committee Date: 5/6/26 — Item C.2 | Also Heard: 04/22/26 — Item C.4

RECOMMENDATION — The Council Memorandum directs the City Manager to:

- Explore opportunities for the City of San José to support the advancement of modular, factory-built housing construction methods for both single-family and multi-family housing that deliver housing more efficiently while maintaining strong labor standards comparable to traditional construction.
- Return with an information memorandum that includes, but is not limited to:
 - An analysis of the opportunities and challenges to utilizing modular factory-built housing with labor standards.
 - A comparative evaluation between modular factory-built housing with labor standards and standard stick-built construction.
 - Recommendations on potential methodologies for incentivizing the use of modular factory-built housing in the City's Gap Financing Program rolling RFP process.

- An assessment of opportunities to support the development of modular housing manufacturing facilities within San José, including potential economic and workforce benefits.
- An analysis of challenges and opportunities around steel-framed modular construction to achieve taller, denser multifamily housing than can be achieved through traditional wood-framed modular construction.

1.2 Background

The City of San José continues to face an urgent need to accelerate the approval and building of housing projects to meet the increasing affordability needs of its residents. Traditional construction methods, while effective, are often constrained by long timelines and financing issues. Modular, factory-built construction has emerged as a promising complementary approach.

Modular construction involves the fabrication of housing units in a controlled factory setting, with components assembled on-site. Research and project delivery experience have shown that modular construction can significantly shorten project timelines and reduce overall costs, while maintaining high construction standards.

Critically, modular construction has demonstrated compatibility with strong labor standards. Several projects have been delivered in partnership with union labor, incorporating apprenticeship pathways, workforce development opportunities, and prevailing wage standards competitive with those of traditional construction.

SECTION 2: REVISED EVALUATION RUBRIC INCLUDING MEMO

#	Criterion (Memo-Aligned)	Weight	Scoring Guidance	Original → Revised
1	CA HCD Approval & Regulatory Readiness	25%	Approved/approvable under CA HCD factory-built housing rules. Has delivered occupied CA projects. Meets seismic, fire, energy, and accessibility standards.	<i>Implicit in 'CA relevance' → Now Primary (25%)</i>
2	Labor Standards: Prevailing Wage, Apprenticeship & Union Compatibility	25%	Companies must demonstrate prevailing wage compliance, apprenticeship pathways, project labor agreement compatibility, or union partnerships (Memo Directive i).	<i>Low weight originally → Now Co-Primary (25%)</i>
3	Multifamily Capability & Permanency	20%	Ability to deliver multi-story, permanent multifamily housing (not just ADUs or temporary). 3+ stories preferred; stack-ability a key factor (Memo Directives i & ii).	<i>Primary originally → Weighted (20%)</i>

4	Steel-Framed / Taller-Denser Capability	10%	Ability to support taller, denser multifamily using steel framing. Particularly relevant for mid-rise (5–12 stories) projects (Memo Directive v).	<i>Not explicitly scored → New Criterion (10%)</i>
5	Gap Financing & RFP Incentive Compatibility	10%	Whether the company's cost structure, delivery timeline, and documentation support City Gap Financing Program RFP scoring criteria (Memo Directive iii).	<i>Not explicitly scored → New Criterion (10%)</i>
6	Local Manufacturing & Workforce Development in San José	5%	The company's ability or willingness to locate a factory in San José or the Bay Area, supporting local jobs and apprenticeship programs (Memo Directive iv).	<i>Not explicitly scored → New Criterion (5%)</i>
7	Financial Stability & Risk Profile	5%	Lessons from Factory_OS, Connect Homes, and ilke Homes. The company must demonstrate stable financing, reliable project pipelines, and bonding/insurance capacity.	<i>Implicit in cautionary notes → Formal (5%)</i>

RATING SCALE: A+ = Excellent across all memo-weighted criteria | A = Strong, project verification needed | B+ = Better than B, approaching A | B = Useful but limited scope | C = Niche/emergency/comparison only | D = Cautionary case only

SECTION 3: THE 12 SCREENING QUESTIONS — REQUIRED FOR ALL VENDORS

Before any vendor is considered for a city-backed or Gap-Financing-supported project, staff should require answers to all 12 of the following questions, now weighted against the Council Memorandum directives.

#	Topic	Question	Memo Criterion
1	CA HCD Approval	Are you approved, or approvable, under California HCD factory-built housing rules?	<i>Criterion 1 (25%)</i>
2	CA Project Delivery	Have you delivered occupied projects in California?	<i>Criterion 1 (25%)</i>
3	Multifamily Experience	Have you delivered multifamily housing — not just single-family homes or ADUs?	<i>Criterion 3 (20%)</i>
4	Labor Standards	Can you comply with prevailing wage, apprenticeship, project labor, or similar labor standards?	<i>Criterion 2 (25%)</i>

5	Financial Stability	Can you provide bonding, insurance, warranties, and evidence of financial stability?	<i>Criterion 7 (5%)</i>
6	All-In Cost	What is the all-in cost after foundation, utilities, transportation, crane work, parking, fire access, and site work?	<i>Criterion 5 (10%)</i>
7	Stack Capability	Can your system stack to 3, 4, 5, 6, or more stories?	<i>Criteria 3 & 4 (30%)</i>
8	Frame Type	Is the structure wood-framed, light-gauge steel, hot-rolled steel, concrete, hybrid, or container-based?	<i>Criterion 4 (10%)</i>
9	CA Code Compliance	Can it meet California seismic, fire, energy, accessibility, and acoustic standards?	<i>Criterion 1 (25%)</i>
10	Local Jobs	Can it support local jobs, apprenticeships, or a Bay Area/San José factory?	<i>Criterion 6 (5%)</i>
11	Company Stability	Is the company financially stable enough to complete a public project?	<i>Criterion 7 (5%)</i>
12	Factory Risk	Is there a risk that the factory shuts down before modules are delivered?	<i>Criterion 7 (5%)</i>

SECTION 4: TRACK 1 — PERMANENT AFFORDABLE MULTIFAMILY HOUSING

These companies are the most relevant for city-supported affordable housing, supportive housing, senior housing, workforce housing, and dense urban infill. This track directly addresses the Council Memorandum's core directive: advancing modular construction methods that deliver housing efficiently while maintaining strong labor standards.

1. Autovol

Previous Rating: A+ | **Revised Rating:** A+ (Confirmed — Memo-Weighted)

WHY IT MATTERS:

Autovol has the strongest direct San José precedent of any company in this report. Its Virginia Street Studios project in San José is documented as a 301-unit, 153,120-square-foot affordable housing project assembled from 160 modules. The Modular Building Institute describes it as the largest senior affordable housing project in San José and the first project manufactured by Autovol. This directly demonstrates California HCD compliance, multifamily delivery at scale, and a Bay Area project pipeline. Autovol has publicly highlighted partnerships that incorporate apprenticeship and workforce development, directly aligned with the Council Memorandum's labor standards directive.

BEST SAN JOSÉ USE:

Affordable multifamily, senior housing, supportive housing, workforce housing, Gap Financing RFP projects.

RESOURCES & LINKS:

Main company website — portfolio, capabilities, team, and factory information.

Website: <https://autovol.com/>

Direct project page for Virginia Street Studios — San José's existing modular affordable housing precedent.

Virginia Street Studios Project Page: <https://autovol.com/virginia-st-studios/>

Contact page for project inquiries and RFP eligibility discussions.

Contact: <https://autovol.com/contact/>

Autovol overview and manufacturing process video on YouTube.

Video — Autovol YouTube: <https://www.youtube.com/@autovol>

2. FullStack Modular

Previous Rating: A+ | **Revised Rating:** A+ (Confirmed — Memo-Weighted)

WHY IT MATTERS:

FullStack Modular opened a 130,000-square-foot West Coast factory in Carson, California, specifically to serve West Coast clients and California housing needs. This is uniquely significant for the Council Memorandum's directive on local manufacturing: a California factory reduces transportation costs, shortens delivery schedules, and may support local labor hiring. FullStack has delivered permanent multifamily high-rise modular projects, including a 32-story tower in Brooklyn — demonstrating the stack capability relevant to the Memorandum's steel-framed, taller-denser directive.

BEST SAN JOSÉ USE:

Permanent multifamily, workforce housing, affordable housing, student housing, dense urban sites, steel-framed mid-rise.

RESOURCES & LINKS:

Main company website with project portfolio, California factory capabilities, and team.

Website: <https://www.fullstackmodular.com/>

Contact page for project inquiries, RFP eligibility, and factory tours.

Contact: <https://www.fullstackmodular.com/contact>

FullStack Modular overview and project videos.

Video — FullStack Modular YouTube: <https://www.youtube.com/@fullstackmodular>

3. Guerdon Modular Buildings

Previous Rating: A+ | **Revised Rating:** A+ (Confirmed — Memo-Weighted)

WHY IT MATTERS:

Guerdon is one of the most experienced large-scale modular companies for multifamily, supportive housing, student housing, hospitality, assisted living, and workforce housing in the United States. Guerdon has a documented track record of delivering affordable and workforce housing, including California-relevant projects. Their large factory capacity and multi-story wood-framed modular experience make them a strong Gap Financing RFP candidate. Guerdon has publicly discussed prevailing wage and labor compliance on public projects.

BEST SAN JOSÉ USE:

Affordable housing, supportive housing, student housing, workforce housing, assisted living, permanent multifamily.

RESOURCES & LINKS:

Main company website with project portfolio, case studies, and capabilities overview.

Website: <https://www.guerdonmodularbuildings.com/>

Contact page for project inquiries, RFP discussions, and partnerships.

Contact: <https://www.guerdonmodularbuildings.com/contact/>

Video library including project case studies and assembly footage.

Video Library: <https://www.guerdonmodularbuildings.com/category/videos/>

Guerdon's official YouTube channel with project and factory videos.

YouTube Channel: <https://www.youtube.com/@guerdonmodular>

4. Z Modular (Zekelman Industries)

Previous Rating: A | **Revised Rating:** A+ (UPGRADED — Steel + Memo Directive v)

WHY IT MATTERS:

Z Modular is upgraded from A to A+ because the Council Memorandum specifically directs staff to analyze steel-framed modular construction for taller, denser multifamily housing — and Z Modular is the leading U.S. steel volumetric modular manufacturer. The Vectorbloc connection system enables rapid multi-story assembly in steel, addressing the memo's directive on taller and denser housing. Z Modular is backed by Zekelman Industries, one of North America's largest steel tube and pipe manufacturers, providing financial stability. Labor standards must be verified.

BEST SAN JOSÉ USE:

Steel-framed multifamily, workforce housing, hotels, student housing, dense mid-rise, taller-denser memo directive.

RESOURCES & LINKS:

Main company website with Vectorbloc system description and project portfolio.

Website: <https://www.z-modular.com/>

Contact for project inquiry, structural consultation, and California screening.

Contact: <https://www.z-modular.com/contact/>

Vectorbloc steel connection system technical page.

Vectorbloc System: <https://www.z-modular.com/vectorbloc/>

Z Modular overview and Vectorbloc system videos.

Video — Z Modular YouTube: <https://www.youtube.com/@zmodular>

5. Volumetric Building Companies (VBC)

Previous Rating: A | **Revised Rating: A (Confirmed — Memo-Weighted)**

WHY IT MATTERS:

VBC is a major volumetric modular company with a strong track record in multifamily, hospitality, student housing, workforce housing, and supportive housing. Their experience with large-scale projects and diverse building types makes them a strong candidate for San José's permanent multifamily needs.

BEST SAN JOSÉ USE:

Permanent multifamily, supportive housing, workforce housing, hotels, and student housing.

RESOURCES & LINKS:

Main company website with project portfolio, capabilities, and team information.

Website: <https://www.vbc.co/>

Contact page for project inquiries and RFP discussions.

Contact: <https://www.vbc.co/contact>

VBC project and company overview videos.

Video — VBC YouTube: <https://www.youtube.com/@vbc-volumetric>

6. Plant Prefab

Previous Rating: A | **Revised Rating: A (Confirmed — CA-Based)**

WHY IT MATTERS:

Plant Prefab is California-based and relevant for low-rise housing, smaller multifamily, ADUs, and infill projects. As a California company, Plant Prefab is more likely to be familiar with California HCD requirements, seismic standards, and local labor practices. A strong candidate for smaller Gap Financing RFP projects and demonstration projects. Their California base also makes them a natural candidate for the local manufacturing assessment called for in the Council Memorandum.

BEST SAN JOSÉ USE:

ADUs, small multifamily, infill housing, low-rise repeatable housing, demonstration projects.

RESOURCES & LINKS:

Main company website with project portfolio, sustainability focus, and California capabilities.

Website: <https://www.plantprefab.com/>

Contact page for project inquiries and RFP eligibility.

Contact: <https://www.plantprefab.com/contact>

Plant Prefab overview and project videos.

Video — Plant Prefab YouTube: <https://www.youtube.com/@plantprefab>

SECTION 5: TRACK 2 — STEEL-FRAMED & TALLER-DENSER MODULAR HOUSING

This track directly responds to Council Memorandum Directive v: an analysis of challenges and opportunities around steel-framed modular construction to achieve taller, denser multifamily housing than can be achieved through traditional wood-framed modular construction. Wood-framed modular is typically limited to 6 stories or fewer under California fire and structural codes. Steel-framed modular can potentially reach 12 or more stories, enabling mid-rise urban infill that matches San José's density goals.

7 (Track 2). Z Modular — Steel Track Lead

Previous Rating: A | Revised Rating: A+ (Upgraded — Primary Steel Modular Candidate)

WHY IT MATTERS:

See Track 1 entry. Z Modular is the primary candidate for San José's steel-framed modular analysis. The Vectorbloc structural connection system enables rapid stacking of steel modules to mid-rise heights. The memo directive specifically requests analysis of steel-framed modular — Z Modular is the most direct answer to that directive among U.S. companies.

BEST SAN JOSÉ USE:

Steel multifamily mid-rise (4–12 stories), workforce housing, dense urban sites.

RESOURCES & LINKS:

Z Modular main website and steel modular capabilities.

Website: <https://www.z-modular.com/>

Contact for steel modular project inquiry.

Contact: <https://www.z-modular.com/contact/>

8 (Track 2). FullStack Modular — High-Rise Steel Track

Previous Rating: A+ | **Revised Rating:** A+ (Confirmed — High-Rise Steel Precedent)

WHY IT MATTERS:

FullStack Modular's Carson, California, factory and track record of building 32-story modular towers make it the strongest candidate for high-rise steel modular demonstration in San José. Their California factory location aligns with the local manufacturing assessment directive.

BEST SAN JOSÉ USE:

High-rise and mid-rise steel modular, permanent multifamily, student housing, and workforce housing.

RESOURCES & LINKS:

Main website with California factory and high-rise project capabilities.

Website: <https://www.fullstackmodular.com/>

Contact for California project inquiry.

Contact: <https://www.fullstackmodular.com/contact>

9 (Track 2 — Benchmark). CIMC Modular Building Systems (China)

Previous Rating: A (International) | **Revised Rating:** A (Benchmark — Not for Direct Procurement)

WHY IT MATTERS:

CIMC MBS is the world's largest volumetric modular manufacturer and a critical benchmark for steel modular at scale. Direct procurement would require California HCD approval, seismic and fire code compliance review, prevailing wage analysis, and trade/tariff review — making it unsuitable for near-term San José procurement. The Council Memorandum's labor standards directive would be particularly challenging to satisfy with an overseas manufacturer.

BEST SAN JOSÉ USE:

Steel modular benchmark, cost modeling, and engineering reference — not for direct San José procurement.

RESOURCES & LINKS:

CIMC MBS official international website with a modular project portfolio and technical specifications.

Website: <https://www.cimc-mbs.com/>

CIMC MBS YouTube channel with factory and project videos.

Video — CIMC YouTube: <https://www.youtube.com/@cimcmodularbuildingsystems539>

10 (Track 2 — Benchmark). BROAD Sustainable Building / BROAD Group (China)

Previous Rating: A (International)
Labor Concerns)

Revised Rating: A (Benchmark Only — Memo

WHY IT MATTERS:

BROAD Group is known for assembling multi-story steel-framed buildings in extremely short timeframes. Direct use in San José faces the same barriers as CIMC, and is fundamentally incompatible with the Council Memorandum's labor standards directive emphasizing apprenticeship pathways, prevailing wage, and union compatibility. Use as a steel-framed engineering benchmark only.

BEST SAN JOSÉ USE:

Steel-framed tall modular engineering benchmark — study reference only.

RESOURCES & LINKS:

BROAD Group international website with technical capabilities.

Website: <https://en.broad.com/>

BROAD USA page with Holon Building system information.

BROAD USA: <https://broadusa.com/broad/holonbuilding/>

11 (Track 2 — Benchmark). Vision Modular Systems / Tide Construction (UK)

Previous Rating: A (International)
High-Density)

Revised Rating: A (Benchmark Only — UK

WHY IT MATTERS:

Vision Modular and Tide Construction have delivered some of the tallest modular residential buildings in the world, including projects in London exceeding 20 stories. Important benchmarks for high-density urban modular strategy. Direct procurement for San José would require full California regulatory compliance and labor standards analysis.

BEST SAN JOSÉ USE:

High-density urban modular benchmark — study reference and design inspiration for taller-denser directive.

RESOURCES & LINKS:

Vision Modular Systems official website.

Website — Vision Modular: <https://www.visionmodular.com/>

Tide Construction website with a modular high-rise project portfolio.

Website — Tide Construction: <https://www.tideconstruction.co.uk/>

SECTION 6: TRACK 3 — ADU & SMALL-LOT INFILL HOUSING

ADU and small-lot infill companies are a separate, complementary strategy addressing the single-family side of the Council Memorandum's directive: backyard cottages, lot-split housing under SB 9, and small-parcel infill. These companies should not be confused with those that can deliver large-scale permanent multifamily projects. Labor standards compliance for any city-subsidy program should also be evaluated.

12. Abodu

Previous Rating: A | Revised Rating: A (Strong Bay Area ADU Candidate)

WHY IT MATTERS:

Abodu is Bay Area-based and specifically focused on ADU design and delivery in California. Strong local relevance, California code familiarity, and a streamlined permitting process for backyard ADUs. Pre-approved plans and relationships with California jurisdictions make it a near-ready candidate for San José's ADU strategy.

BEST SAN JOSÉ USE:

Backyard ADUs, small infill, family housing, apartment-site infill, single-family lot diversification.

RESOURCES & LINKS:

Main website with ADU models, pricing, and California service area.

Website: <https://www.abodu.com/>

Contact page for project inquiries.

Contact: <https://www.abodu.com/contact>

Abodu product and process overview videos.

Video — Abodu YouTube: <https://www.youtube.com/c/Abodu>

13. Villa Homes

Previous Rating: B+ | **Revised Rating:** B+ (California ADU/Infill Candidate)

WHY IT MATTERS:

Villa Homes is a California-based company focused on ADUs, lot-split housing, and backyard cottages with experience in the state's ADU permitting environment.

BEST SAN JOSÉ USE:

ADUs, lot-split housing, backyard cottages, small infill.

RESOURCES & LINKS:

Main website with ADU designs, California services, and pricing.

Website: <https://www.villahomes.com/>

Contact for project inquiries.

Contact: <https://www.villahomes.com/contact-us>

14. USModular

Previous Rating: B | **Revised Rating:** B (Modular Homes and ADUs)

WHY IT MATTERS:

USModular offers modular detached homes, ADUs, and residential rebuilds. California-based and familiar with California codes.

BEST SAN JOSÉ USE:

Modular detached homes, ADUs, rebuilds, and smaller residential sites.

RESOURCES & LINKS:

Main website with residential modular and ADU offerings.

Website: <https://www.usmodularinc.com/>

Contact page.

Contact: <https://www.usmodularinc.com/contact-us/>

15. prefabADU

Previous Rating: B | Revised Rating: B (ADU Specialist)

WHY IT MATTERS:

prefabADU focuses specifically on California ADU production, streamlined for the homeowner market.

BEST SAN JOSÉ USE:

ADUs, small infill, homeowner-scale projects.

RESOURCES & LINKS:

Main website with California ADU products and process.

Website: <https://prefabadu.com/>

Contact.

Contact: <https://prefabadu.com/contact/>

16. California Modular Houses

Previous Rating: B | Revised Rating: B (CA ADU/Single-Family)

WHY IT MATTERS:

California Modular Houses offers ADUs and single-family modular homes with California code familiarity.

BEST SAN JOSÉ USE:

ADUs, single-family modular, small infill.

RESOURCES & LINKS:

Main website.

Website: <https://www.californiamodularhouses.com/>

Contact.

Contact: <https://www.californiamodularhouses.com/contact>

SECTION 7: MANUFACTURED HOUSING & LOWER-COST DETACHED BENCHMARKS

These companies produce HUD-code manufactured homes and modular homes for the suburban and rural single-family market. Less central to San José's dense urban multifamily needs but useful for manufactured housing communities, disaster replacement housing, or cost comparison benchmarking.

17. Clayton Homes (Berkshire Hathaway)

Previous Rating: B | Revised Rating: B (Benchmark — Manufactured Homes)

WHY IT MATTERS:

The largest manufactured and modular home company in the United States, owned by Berkshire Hathaway. Their scale and cost efficiency make them a valuable cost benchmark for lower-cost detached housing. Not appropriate for dense urban San José multifamily.

BEST SAN JOSÉ USE:

Manufactured homes, modular homes, lower-cost detached homes, manufactured housing communities, and disaster replacement.

RESOURCES & LINKS:

Main website with home models, locations, and financing options.

Website: <https://www.claytonhomes.com/>

Contact and customer service.

Contact: <https://www.claytonhomes.com/contact-us/>

Clayton Homes YouTube channel.

Video — Clayton Homes YouTube: <https://www.youtube.com/@ClaytonHomes>

18. Cavco Industries / Cavco Homes

Previous Rating: B | Revised Rating: B (Benchmark — Manufactured & Park Models)

WHY IT MATTERS:

Major manufactured home and park model manufacturer. Useful for cost benchmarking and disaster replacement housing analysis.

BEST SAN JOSÉ USE:

Manufactured homes, modular homes, park models, cabins, disaster replacement housing.

RESOURCES & LINKS:

Main Cavco Homes website.

Website: <https://www.cavcohomes.com/>

Contact page.

Contact: <https://www.cavcohomes.com/contact>

19. Champion Homes / Skyline Champion

Previous Rating: B | Revised Rating: **B (Benchmark — Manufactured Homes)**

WHY IT MATTERS:

Publicly traded manufactured and modular home company. Useful as a benchmark for lower-cost detached housing and park models.

BEST SAN JOSÉ USE:

Manufactured homes, modular homes, park models, ADUs, and cabins.

RESOURCES & LINKS:

Main website with home models.

Website: <https://www.championhomes.com/>

Dealer locator.

Dealer Locator: <https://www.championhomes.com/find-retailers-dealers/>

SECTION 8: TRACK 4 — TEMPORARY, TRANSITIONAL & EMERGENCY HOUSING

These companies and systems must be evaluated under a completely separate regulatory and policy framework from permanent housing. Useful for emergency shelter, disaster response, encampment alternatives, interim housing villages, construction workforce housing, or temporary public facilities. Many are not appropriate for permanent residential housing without extensive code review.

20. Mobile Modular / McGrath RentCorp (California-Based)

Previous Rating: B+ | Revised Rating: **B+ (Top Temporary/Interim — CA Based)**

WHY IT MATTERS:

Mobile Modular is headquartered in California and is one of the most accessible temporary modular companies for San José. An inventory of modular classroom, office, and facility modules can be rapidly deployed for temporary public facilities, interim housing support buildings, and emergency operations centers.

BEST SAN JOSÉ USE:

Temporary public facilities, classrooms, offices, interim housing support buildings, and emergency operations.

RESOURCES & LINKS:

Main website with modular building rental and purchase options.

Website: <https://www.mobilemodular.com/>

Contact page.

Contact: <https://www.mobilemodular.com/contact-us>

21. WillScot / Mobile Mini

Previous Rating: B | **Revised Rating: B (Temporary Office & Workforce Support)**

WHY IT MATTERS:

National leader in temporary modular space solutions, including offices, classrooms, and workforce support buildings.

BEST SAN JOSÉ USE:

Temporary offices, classrooms, emergency support buildings, and workforce support.

RESOURCES & LINKS:

Main website with temporary modular solutions.

Website: <https://www.willscot.com/>

22. VESTA Modular

Previous Rating: B | **Revised Rating: B (Workforce Housing & Public Facilities)**

WHY IT MATTERS:

Specializes in workforce housing, schools, healthcare facilities, and government buildings with California project experience.

BEST SAN JOSÉ USE:

Workforce housing, offices, schools, healthcare, government buildings, interim facilities.

RESOURCES & LINKS:

Main website with modular building capabilities.

Website: <https://www.vestamodular.com/>

Contact.

Contact: <https://www.vestamodular.com/contact>

23. Palomar Modular Buildings

Previous Rating: B | Revised Rating: **B (Public Facilities & Possible Housing)**

WHY IT MATTERS:

Serves public agencies, schools, and government clients with modular buildings in California. Experience with California public procurement.

BEST SAN JOSÉ USE:

Workforce housing, government buildings, schools, public facilities.

RESOURCES & LINKS:

Main website.

Website: <https://palomarmodular.com/>

Contact.

Contact: <https://palomarmodular.com/contact-us/>

24. Better Shelter (Sweden/Humanitarian)

Previous Rating: C | Revised Rating: **C (Humanitarian Dignified Interim Shelter)**

WHY IT MATTERS:

Produces flat-pack shelter units developed with UNHCR for humanitarian use. Useful as a reference for San José's encampment alternatives strategy — dignified interim shelter for unhoused populations.

BEST SAN JOSÉ USE:

Humanitarian shelter, emergency shelter, temporary villages, dignified interim shelter.

RESOURCES & LINKS:

Better Shelter official website.

Website: <https://bettershelter.org/>

Product overview video.

Video — Better Shelter Overview: https://www.youtube.com/watch?v=kv_ebVYqj2M

25. Alaska Defense / Alaska Structures

Previous Rating: C+ | **Revised Rating:** C+ (Military-Style Emergency Shelter)

WHY IT MATTERS:

Produces military-grade fabric tension structures for rapid emergency deployment. Not for permanent residential housing.

BEST SAN JOSÉ USE:

Military-style field shelter, disaster-response shelter, emergency operations.

RESOURCES & LINKS:

Official website.

Website: <https://alaskadefense.com/>

26. HDT Global

Previous Rating: C+ | **Revised Rating:** C+ (Military Deployable Structures)

WHY IT MATTERS:

Deployable shelters and structures for military and humanitarian applications.

BEST SAN JOSÉ USE:

Military shelters, deployable structures, emergency command/support sites.

RESOURCES & LINKS:

HDT Global official website.

Website: <https://www.hdtglobal.com/>

27. Weatherhaven (Canada/Global)

Previous Rating: C+ | **Revised Rating:** C+ (Remote Workforce & Emergency)

WHY IT MATTERS:

Relocatable modular shelters for military, humanitarian, and remote workforce applications.

BEST SAN JOSÉ USE:

Military, humanitarian, temporary emergency housing, and remote workforce camps.

RESOURCES & LINKS:

Official website.

Website: <https://weatherhaven.com/>

28. World Housing Solution

Previous Rating: C+ | Revised Rating: C+ (Rapid-Deploy Government/Medical)

WHY IT MATTERS:

Rapidly deployable shelter for government, humanitarian, and field operations.

BEST SAN JOSÉ USE:

Rapid-deploy shelters for government, humanitarian, medical, and field operations.

RESOURCES & LINKS:

Official website.

Website: <https://worldhousingsolution.com/>

29. UPLIFT Shelters

Previous Rating: C | Revised Rating: C (Foldable Emergency Shelter)

WHY IT MATTERS:

Foldable emergency shelter for rapid disaster response.

BEST SAN JOSÉ USE:

Foldable emergency shelter and disaster response.

RESOURCES & LINKS:

Official website.

Website: <https://upliftshelters.com/>

SECTION 9: INTERNATIONAL FACTORY HOUSING BENCHMARKS

These companies represent the leading edge of industrialized, factory-produced housing internationally. Not candidates for direct San José procurement due to regulatory, labor, trade, and logistics barriers, but essential references for policy design, design standards, cost benchmarking, and long-term manufacturing strategy.

30. Lindbäcks (Sweden)

Previous Rating: B+ | Revised Rating: **B+ (Timber Multifamily Benchmark)**

WHY IT MATTERS:

Swedish mass timber and prefabricated multifamily housing manufacturer with a large-scale industrial production model. Benchmark for sustainable modular multifamily and comparison with stick-built construction.

BEST SAN JOSÉ USE:

Factory-produced timber multifamily benchmark — design and production model reference.

RESOURCES & LINKS:

Lindbäcks official website with solutions and project portfolio.

Website: <https://lindbacks.se/solutions/>

31. BoKlok (Sweden/UK — IKEA/Skanska Joint Venture)

Previous Rating: B+ | Revised Rating: **B+ (Cost-Conscious Standardized Housing Benchmark)**

WHY IT MATTERS:

Joint venture between IKEA and Skanska producing standardized, cost-efficient factory-built housing. Their model of standardized design + factory production + community-scale deployment is a strong policy benchmark for San José's Gap Financing RFP design.

BEST SAN JOSÉ USE:

Cost-conscious standardized housing policy benchmark — Gap Financing RFP design reference.

RESOURCES & LINKS:

BoKlok global website.

Website: <https://www.boklok.se/global/>

32. Daiwa House / Sekisui House (Japan)

Previous Rating: B+ | Revised Rating: **B+ (Industrial Housing Quality Benchmark)**

WHY IT MATTERS:

Japan's largest industrialized housing manufacturer, with decades of experience producing high-quality factory-built homes on a national scale. Quality control systems, production efficiency, and community-scale delivery models are important benchmarks for San José's long-term modular manufacturing strategy.

BEST SAN JOSÉ USE:

Industrialized housing quality control, large-scale production, and community-scale housing benchmarks.

RESOURCES & LINKS:

Daiwa House international website.

Website — Daiwa House: <https://www.daiwahouse.com/English/>

Sekisui House global website.

Website — Sekisui House: <https://www.sekisuihouse-global.com/>

SECTION 10: REGULATORY AGENCIES & FUNDING PARTNERS

These are not manufacturers. They are essential partners for regulation, funding, emergency housing, and procurement. Cross-referencing all company listings against these agencies is required before any city-backed project moves forward.

1. California Department of Housing and Community Development (HCD)

PRIMARY REGULATORY GATEKEEPER. Factory-built housing approval, state housing funds, and manufactured housing code compliance. Every vendor must be screened against HCD's factory-built housing program before San José can use city funds.

HCD main website — state housing policy, funds, and regulatory programs.

Website: <https://www.hcd.ca.gov/>

HCD Factory-Built Housing program — approval process, insignia requirements, and quality-assurance agency list.

Factory-Built Housing Program: <https://www.hcd.ca.gov/building-standards/fbh>

2. City of San José Housing Department / Planning / Public Works

Local site selection, Gap Financing Program administration, permitting, code review, labor standards compliance, and RFP design. The Gap Financing Program rolling RFP is the primary tool referenced in Council Memorandum Directive iii.

San José Housing Department — Gap Financing Program and affordable housing resources.

Housing Department:

<https://www.sanjoseca.gov/your-government/departments-offices/housing>

Planning, Building, and Code Enforcement — permits, zoning, and modular housing code review.

Planning, Building & Code Enforcement:

<https://www.sanjoseca.gov/your-government/departments-offices/planning-building-code-enforcement>

3. County of Santa Clara Office of Supportive Housing

Supportive housing, homelessness response, county funding coordination. Essential partner for Track 4 temporary housing and Track 1 supportive housing projects.

Santa Clara County Office of Supportive Housing website.

Website: <https://osh.sccgov.org/>

4. U.S. Department of Housing and Urban Development (HUD)

Federal affordable housing programs, manufactured housing standards (HUD code), vouchers, public housing, CDBG, and HOME funds.

HUD main website — federal housing programs and funding.

Website: <https://www.hud.gov/>

HUD Manufactured Housing program — federal code standards.

Manufactured Housing: https://www.hud.gov/program_offices/housing/rmra/mhs

5. FEMA (Federal Emergency Management Agency)

Disaster housing, temporary housing units, direct lease programs, manufactured housing units, and post-disaster recovery. Relevant for Track 4.

FEMA sheltering and housing options for disaster survivors.

FEMA Sheltering & Housing:

<https://www.fema.gov/assistance/individual/sheltering-housing-options>

6. California Governor's Office of Emergency Services (Cal OES)

California emergency management, wildfire/earthquake/flood recovery coordination. Relevant for Track 4.

Cal OES official website.

Website: <https://www.caloes.ca.gov/>

7. U.S. Army Corps of Engineers

Emergency construction, military housing, temporary camps, and disaster engineering. Referenced for military-style rapid deployable systems in Track 4.

U.S. Army Corps of Engineers official website.

Website: <https://www.usace.army.mil/>

8. U.S. General Services Administration (GSA)

Federal procurement and public purchasing systems. Relevant for any federal procurement of modular housing for San José-supported projects.

GSA official website with federal procurement resources.

Website: <https://www.gsa.gov/>

SECTION 11: CAUTIONARY CASE STUDIES — WHAT CAN GO WRONG

The Council Memorandum focuses on opportunity, but any responsible analysis must include risk. The following cautionary cases demonstrate that even well-capitalized, promising modular housing efforts can fail. San José must require financial stability verification (Screening Question 12) before any city-backed commitment.

WARNING: All four of these failures involved companies that appeared promising at the time of investment or partnership. Financial instability, insufficient project pipeline, and misaligned manufacturing economics were the common causes.

Factory_OS / Harbinger — Bay Area Cautionary Case

Factory_OS/Harbinger was Bay Area-based, union-partnered, and specifically focused on modular affordable housing — appearing ideal for San José's goals. The company faced serious business-continuity problems, including layoffs and financial distress. This is the most directly relevant cautionary case for San José because it operated in the same geographic and policy context that the City is now pursuing. Key lesson: Union partnership and local Bay Area presence are not sufficient without stable financing, a reliable project pipeline, and a viable factory utilization model.

Factory_OS official website — verify current status before any engagement.

Website: <https://www.factoryos.com/>

Housing Innovation Hub profile — case study on Bay Area modular startup challenges.

Case Study: <https://housinginnovation.co/factory/factory-os/>

Connect Homes — California Cautionary Case

Connect Homes was a well-known California prefab company that struggled to achieve the financial stability required for sustained public project delivery. Verify current operational status before any engagement.

Connect Homes website — current status must be verified.

Website: <https://connect-homes.com/>

ilke Homes (UK) — Capital-Heavy Modular Collapse

ilke Homes was a well-funded UK modular housing manufacturer that entered administration in 2023 despite significant investment and government housing contracts. Demonstrates that even large-scale, government-supported modular factories can fail if housing demand, financing, and factory utilization do not align simultaneously.

Legal & General Modular Homes (UK) — Corporate Exit

Legal & General, one of the UK's largest financial institutions, launched a major modular housing factory and subsequently wound down the operation. This is a reminder that institutional investment does not guarantee sustainable modular manufacturing. The economics of factory utilization — requiring a steady pipeline of projects to justify overhead — are fundamentally different from traditional construction.

SECTION 12: RECOMMENDED SAN JOSÉ STRATEGY

San José should not issue one general 'prefab housing' RFP. Each track has different regulatory requirements, company candidates, labor considerations, and policy tools.

TRACK 1 — Permanent Affordable Multifamily

Memo Reference: Memo Directives i, ii, iii, iv

Priority Companies: Autovol, FullStack Modular, Guerdon, Z Modular, VBC, Plant Prefab

Purpose: Affordable housing, senior housing, supportive housing, workforce housing, and city-backed multifamily projects. Primary use of Gap Financing Program RFP.

TRACK 2 — Steel-Framed & Taller-Denser Modular

Memo Reference: Memo Directive v

Priority Companies: Z Modular, FullStack Modular, CIMC MBS (benchmark), BROAD Group (benchmark), Vision Modular / Tide Construction (benchmark)

Purpose: Determine whether steel modular can help San José produce taller, denser housing than wood-framed modular allows. Study mid-rise feasibility (5–12 stories).

TRACK 3 — ADU & Small-Lot Infill

Memo Reference: Memo Directive a (single-family)

Priority Companies: Abodu, Villa Homes, Plant Prefab, USModular, prefabADU, California Modular Houses

Purpose: Backyard homes, lot-split housing under SB 9, small parcels, apartment-site infill. Complements but does not replace the multifamily strategy.

TRACK 4 — Temporary, Transitional & Emergency Housing

Memo Reference: Complementary emergency track — separate regulatory framework required

Priority Companies: Mobile Modular, WillScot, VESTA Modular, Palomar Modular, Better Shelter, FEMA / Cal OES models

Purpose: Emergency shelter, disaster recovery, encampment alternatives, temporary housing villages, and public support facilities.

SECTION 13: CONSOLIDATED COMPANY RANKINGS — ALL TRACKS

#	Company	Track	Orig.	Revised	Key Memo-Weighted Factor
1	Autovol	Track 1 — Permanent Multifamily	A+	A+	Strongest San José precedent (Virginia Street Studios, 301 units). CA-ready, labor-compatible.
2	FullStack Modular	Track 1 & 2 — Multifamily/Steel	A+	A+	CA factory in Carson. 32-story high-rise steel precedent. Strong for Gap Financing RFP.
3	Guerdon Modular Buildings	Track 1 — Permanent Multifamily	A+	A+	Large-scale multifamily experience. Strong labor standards. CA-relevant.

4	Z Modular (Zekelman)	Track 1 & 2 — Steel/Taller-Denser	A	A+ (UPGRADED)	Only U.S. steel volumetric modular leader. Directly addresses Directive v.
5	VBC (Volumetric Building Cos.)	Track 1 — Permanent Multifamily	A	A	Major volumetric modular company. Strong multifamily track record.
6	Plant Prefab	Track 1 & 3 — Low-Rise/ADU	A	A	CA-based. Strong for low-rise, infill, ADU, and demonstration projects.
7	Abodu	Track 3 — ADU/Small Infill	A	A	Bay Area ADU specialist. CA code familiarity. Single-family strategy.
8	Villa Homes	Track 3 — ADU	B+	B+	CA-based ADU and small infill.
9	Mobile Modular (McGrath)	Track 4 — Temporary	B+	B+	CA-based. Best temporary/interim option for San José.
10	Lindbäcks (Sweden)	Benchmark	B+	B+	Timber multifamily benchmark. Policy and design reference.
11	BoKlok (IKEA/Skanska)	Benchmark	B+	B+	Standardized housing cost benchmark. Gap Financing RFP design reference.
12	Daiwa House / Sekisui House	Benchmark	B+	B+	Japanese industrial housing quality benchmark.
13	USModular	Track 3 — ADU/Residential	B	B	CA-based modular homes and ADUs. Limited multifamily.
14	prefabADU	Track 3 — ADU	B	B	CA ADU specialist. Homeowner market focus.
15	California Modular Houses	Track 3 — ADU/Single-Family	B	B	CA ADUs and single-family modular.
16	Clayton Homes	Manufactured Benchmark	B	B	Largest U.S. manufactured home company. Cost benchmark only.
17	Cavco Industries	Manufactured Benchmark	B	B	Manufactured homes and park models. Disaster replacement reference.
18	Champion Homes / Skyline	Manufactured Benchmark	B	B	Manufactured homes and park models. Cost benchmark.
19	WillScot / Mobile Mini	Track 4 — Temporary	B	B	Temporary modular offices and support buildings.
20	VESTA Modular	Track 4 — Temporary	B	B	Workforce housing and public facilities. CA experience.
21	Palomar Modular Buildings	Track 4 — Temporary	B	B	CA public facilities and interim modular buildings.
22	CIMC MBS (China)	Track 2 — Benchmark Only	A (Int'l)	A (Benchmark)	World's largest volumetric modular mfr. Benchmark only.
23	BROAD Group (China)	Track 2 — Benchmark Only	A (Int'l)	A (Benchmark)	Tall steel modular benchmark. Labor directive barriers.
24	Vision Modular / Tide (UK)	Track 2 — Benchmark Only	A (Int'l)	A (Benchmark)	Tallest modular residential benchmark.
25	Better Shelter (Sweden)	Track 4 — Humanitarian	C	C	Dignified interim shelter. Encampment alternatives reference.
26	Alaska Defense / Structures	Track 4 — Emergency	C+	C+	Military-style field shelter. Emergency response only.
27	HDT Global	Track 4 — Emergency	C+	C+	Military deployable structures. Emergency only.

28	Weatherhaven (Canada)	Track 4 — Emergency	C+	C+	Military and humanitarian shelter.
29	World Housing Solution	Track 4 — Emergency	C+	C+	Rapid-deploy government and humanitarian shelters.
30	UPLIFT Shelters	Track 4 — Emergency	C	C	Foldable emergency shelter only.

SECTION 14: SUGGESTED COUNCIL DIRECTIONS — STAFF MEMO DELIVERABLES

Based on the Council Memorandum's five directives, the following specific deliverables are recommended for the City Manager's return information memorandum:

1. A ranked list of California-ready modular firms, separated by Track 1 (multifamily), Track 2 (steel/taller-denser), Track 3 (ADU/infill), and Track 4 (temporary). Autovol, FullStack Modular, Guerdon, Z Modular, and VBC are the priority Track 1 and 2 candidates.
2. A detailed review of completed California modular housing projects — beginning with Virginia Street Studios in San José (Autovol) as the strongest local precedent.
3. A full cost comparison between modular and stick-built construction using all-in project costs (foundation, transportation, crane, site work, permits) — not just factory module costs — addressing Council Memorandum Directive ii.
4. A review of California HCD factory-built housing approval requirements, including the insignia process and approved quality-assurance agencies — addressing Directive i.
5. A labor standards analysis: prevailing wage compliance, apprenticeship pathway availability, project labor agreement compatibility, and union partnership precedents in modular housing — the Council Memorandum's most emphasized criterion.
6. A risk assessment covering modular factory shutdowns, including Factory_OS/Harbinger, Connect Homes, ilke Homes, and Legal & General Modular Homes — to inform financial stability requirements in the Gap Financing Program RFP.
7. An assessment of whether San José could support or attract a regional modular manufacturing facility — addressing Directive iv and the potential for local job creation and apprenticeship programs.
8. Gap Financing Program RFP methodology recommendations — how modular housing scoring criteria, cost thresholds, labor standards requirements, and timeline incentives could be incorporated into the existing rolling RFP process, addressing Directive iii.
9. A separate steel-framed modular analysis — engineering feasibility, cost differential vs wood-framed modular, California seismic and fire code compliance, and company

capability comparison (Z Modular, FullStack Modular, international benchmarks) — addressing Directive v.

10. A separate emergency and interim housing analysis covering Track 4 systems, distinct from permanent housing policy.

BOTTOM LINE

Factory-built housing can help San José meet its housing goals — but only if the City separates the market into four realistic tracks, requires full California HCD compliance, demands labor standards verification before any city-backed procurement, uses all-in costs (not just module costs) for comparison with stick-built construction, and rigorously screens for financial stability to avoid repeating the Factory_OS/Harbinger experience in its own backyard.

The four strongest near-term permanent multifamily candidates are: Autovol (proven San José precedent), FullStack Modular (California factory + high-rise steel capability), Guerdon (large-scale multifamily experience), and Z Modular (upgraded — direct response to Council Memorandum Directive v on steel-framed taller/denser housing).