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LEGACY FOUNDATION FOR BAYVIEW HUNTERS POINT

STRATEGIC PLAN FOR 2017 - 2022

Presentation Overview

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- 1) Hunters Point Shipyard & Candlestick Point Project Background
- 2) Legacy Foundation Background
- 3) Legacy Foundation Strategic Plan Overview
- 4) Next Steps

Hunters Point Shipyard & Candlestick Point (HPS/CP)

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- 12,100 homes, 32% below-market
- 352 acres of parks and open space
- 3,150,000 sq. ft. of R&D/office space, producing more than 12,000 permanent jobs
- 885,000 sq. ft. of retail
- 325,000 sq. ft. of artist and community facilities
- \$83.2 Million in Community Benefits
- Rebuilding of Alice Griffith Public Housing
- New Bus Rapid Transit, express busses and extending crosstown lines



Phase 1: Disposition & Development Agreement

Phase 1 DDA

Community Benefits Plan

Community Benefits Agreement (2005)

Affordable Housing Program

BVHP Employment & Contracting Policies

Construction & Permanent Jobs

Small & Minority Owned Businesses

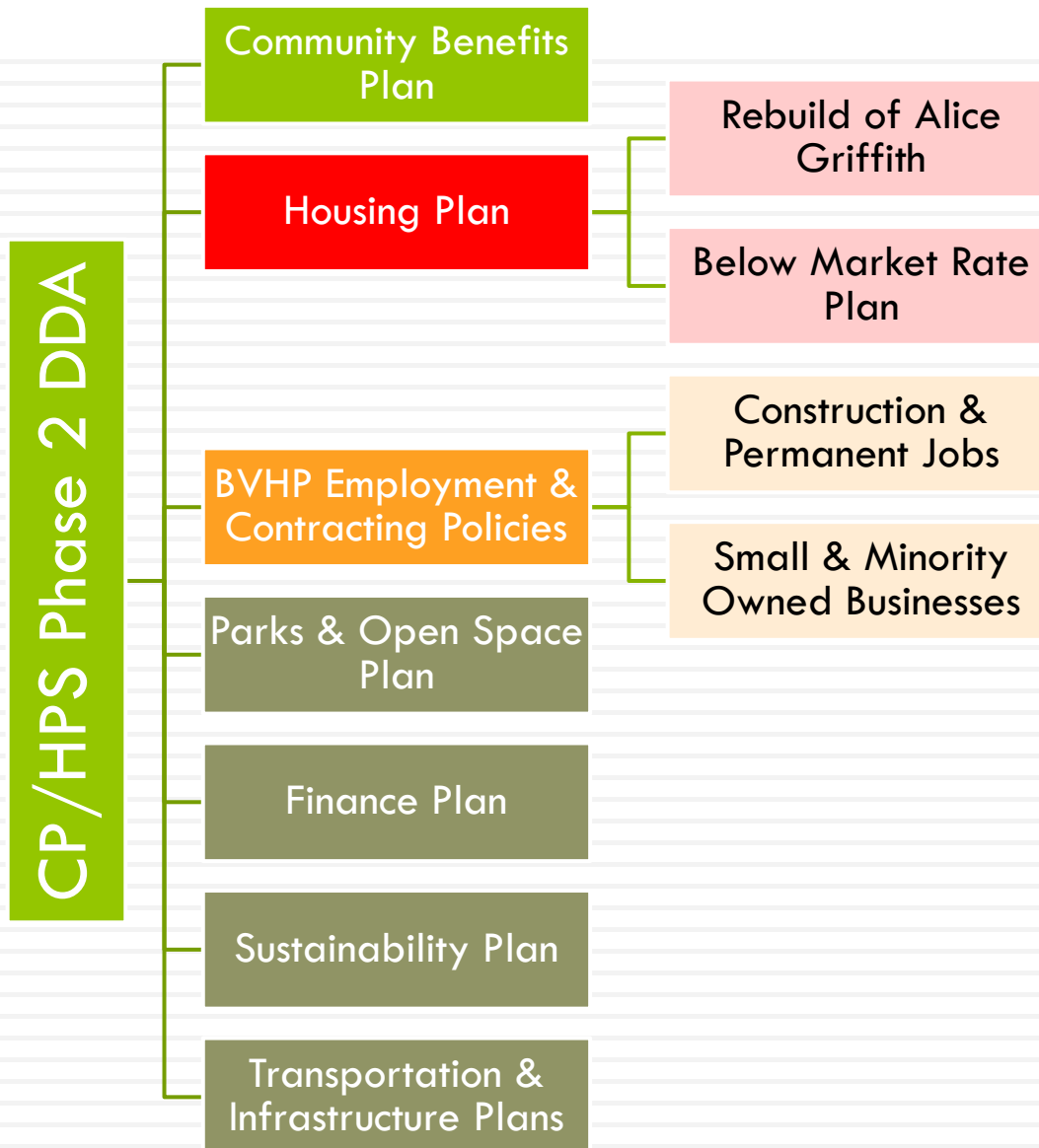
Open Space Plan

Financing Plan

Transportation Plan

- **Parties:** OCII & HPS Development Co., LP
- **HPS Phase 1 DDA:** Entered into 2004
- **Phase 1 CBA:** Entered into 2005; amended 2009
- **CBA Overseen by:**
 - ▣ Commission on Community Investment and Infrastructure
 - ▣ HPS Citizens Advisory Committee (CAC)
 - ▣ Legacy Foundation (Not a designated 501c3. Funds held by OCII prior to disbursement)

Phase 2: Disposition & Development Agreement

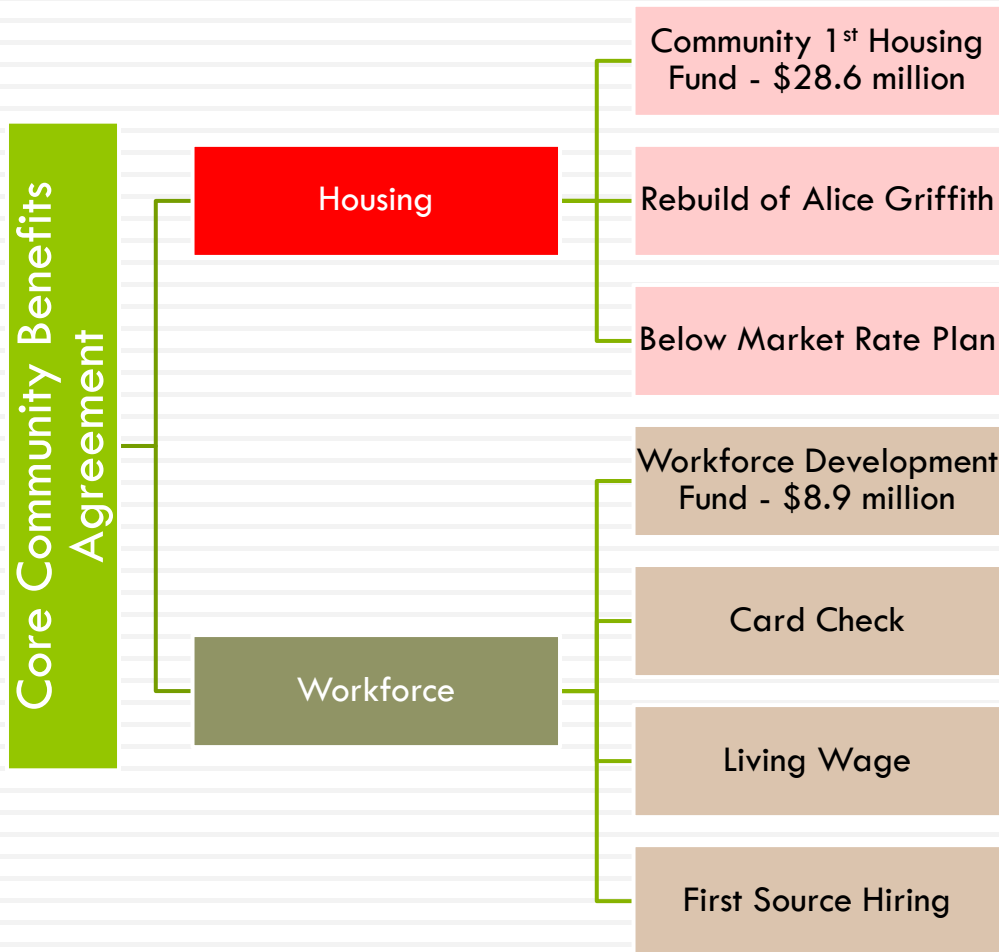


- **Parties:** OCII & CP Development Co., LP
- **CP & HPS Phase 2 DDA:** Entered into 2010
- **CBA Overseen by:**
 - ▣ Commission on Community Investment and Infrastructure
 - ▣ HPS Citizens Advisory Committee (CAC)
 - ▣ Legacy Foundation

2008: Core Community Benefits Agreement

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OClI is not a party to the CCBA



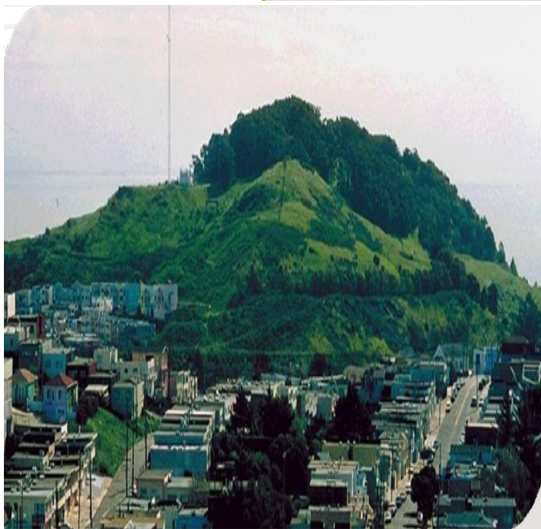
- **Agreements Between:**
Developer & Alliance for District 10 (AD 10)
- **Entered:** into in 2008
- **Overseen by:**
Implementation Committee
 - ▣ FivePoint
 - ▣ SF Labor Council (SFLC)
 - ▣ San Francisco Organizing Project (SFOP)
 - ▣ SF ACORN (now ACCE)
 - ▣ HPS CAC
 - ▣ BVHP Project Area Committee (PAC)
 - ▣ “At large” member

Phase 1: Community Benefits

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CP/HPS Phase 1 DDA

- **Community Benefits Fund**
- **Community Facilities Parcels**
- Construction Assistance Program
- Community Builder Program
- International African Marketplace
- Local Community Priority Leasing Program
- Cultural/Historic Recognition Program
- Business Incubator Space program
- Home Buyers Assistance Program
- Job Training & Employment Assistance
- Small Business Assistance Program
- Reporting



Phase 2: Community Benefits

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CP/HPS Phase 2 DDA

- **Community Benefits Fund***
- **Community Facilities Parcels***
- Construction Assistance Program*
- Community Builder Program*
- International African Marketplace*
- Community Facilities Space
- Community Real Estate Broker Program
- Business Incubator Space Program*
- Scholarship Fund
- Education Improvement Fund
- Community Health & Wellness Contributions



* Denotes Phase 1 Program
carried forward into Phase 2

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Background: Legacy Foundation

Legacy Foundation: Purpose

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Phase 1 & Phase 2 DDAs:

The Legacy Foundation Community Benefits Fund is to be reinvested in the BVHP Community to:

- Benefit low- and moderate income families
- Meet other community development needs:
 - social services
 - affordable housing
 - education
 - the arts
 - public safety

Legacy Foundation: Mission

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➤ **Mission and Core Values**

The Legacy Foundation is committed to building, strengthening, and maintaining the Bayview Hunter's Point community.

➤ **Mission**

The Legacy Foundation's fundamental mission is to alleviate the impact of poverty in San Francisco's Bayview Hunters Point community.

➤ **Core Values**

Transparency

Integrity

Respect

Accountability

Collaboration

Community

Legacy Foundation: Board Members

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7 Appointed Members may elect 4 additional Members for a total of 11 members. Currently, a total of 6 Member seats are vacant.

APPOINTED DIRECTORS

TEDD HUNT, CHAIRPERSON

- (Former Bayview PAC Representative)

PASTOR JOSIAH BELL

- (HPS CAC Representative)

CARMEN KELLY

- (District 10 Supervisor Representative)

DR. VERONICA HUNNICUTT

- (HPS CAC Rep)

LILA HUSSAIN

- (OCII Representative)

VACANT

- (Mayor's Representative)

VACANT

- (BVHP CAC)

Legacy Foundation: Source of Funds & Use

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Phase 1 DDA - 5th Amendment:

Source: Developer Contributions based on:

- Participation in Land Sales after development costs are recovered
- 2009: Developer contributed \$1 million “prepayment”
- Developer provides annual accounting to the Legacy Foundation, CAC & OCII
 - Projections show no additional contribution anticipated

Use: Phase 1 Legacy Foundation contributions are not tied to specific uses or Programs

Phase 2: Source of Funds & Use

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Phase 2 DDA: Two sources & uses of Legacy Foundation Funds:

1) Education Funds: Lennar Bayview Scholarship Fund & Will Bass Memorial Education Travel Scholarship - \$3.5 million

Development Milestones:

- **1st Major Phase Approval – Developer Contribution received 2014:** \$500k payment
- **Each 1,000 Unit Credit:** Additional \$300k payments (anticipated 2020)

2) Un-programmed Funds:

Participation: Vertical developers contribute 0.5% of the first sale price of each market-rate housing unit.

- To date no market rate homes have sold on Phase 2 (anticipated 2018)

Community Facilities Lots

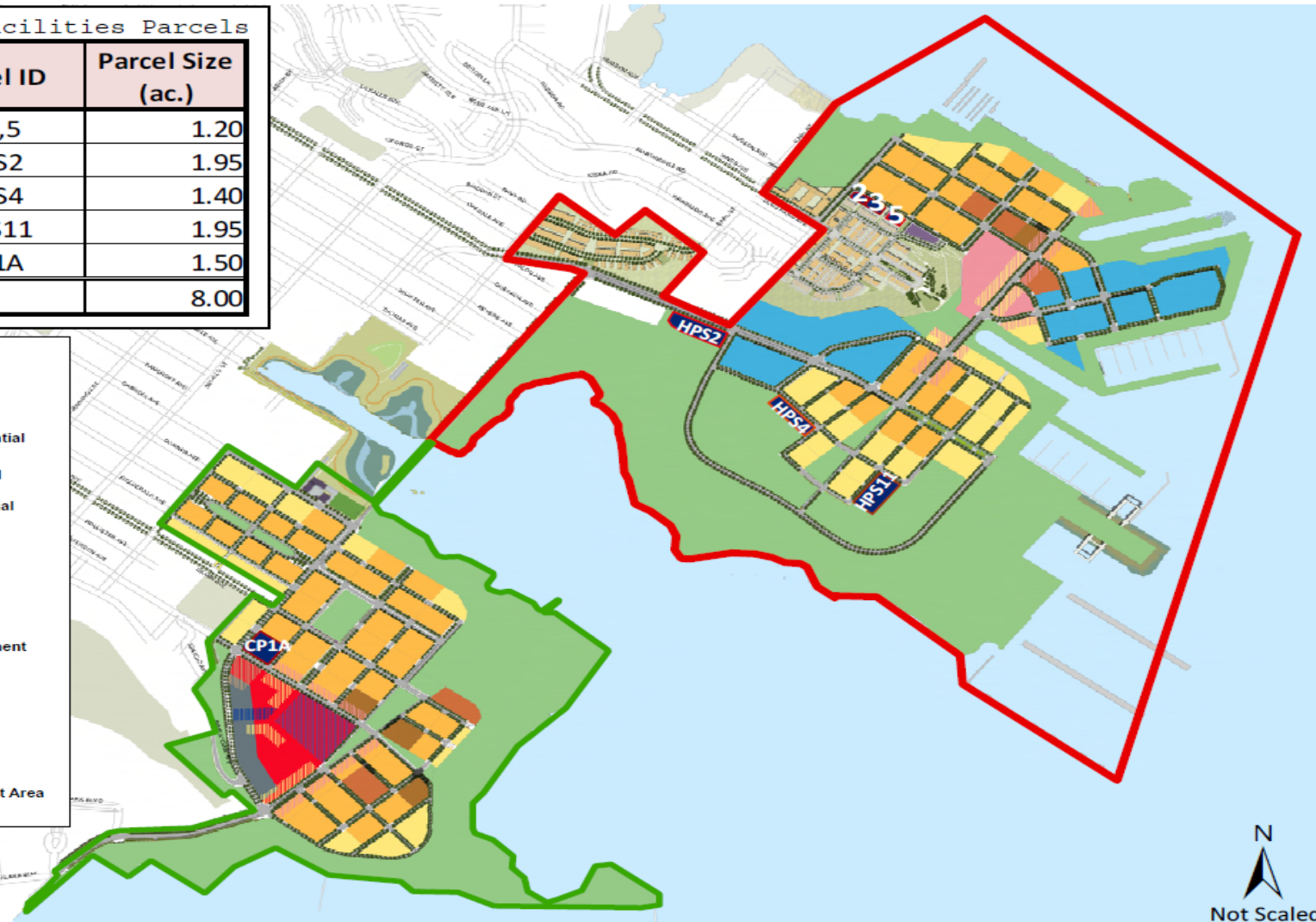
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TABLE: Community Facilities Parcels

Phase	Parcel ID	Parcel Size (ac.)
HP Phase I	2,3,5	1.20
HP Phase II	HPS2	1.95
	HPS4	1.40
	HPS11	1.95
CP Phase II	CP1A	1.50
TOTAL ACREAGE		8.00

LEGEND

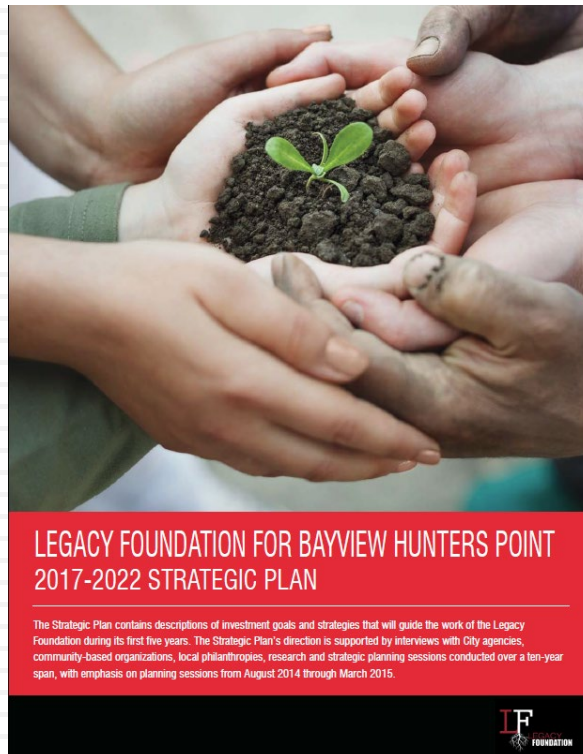
- Low Density Residential
- Medium Density Residential
- High Density Residential
- Tower Density Residential
- Neighborhood Retail
- Regional Retail
- Office
- Research and Development
- Community Facility
- Parks & Open Space
- Shipyard Project Area
- Candlestick Park Project Area



N
Not Scaled

Community Facilities Lots Map

Strategic Plan



LEGACY FOUNDATION FOR BAYVIEW HUNTERS POINT 2017-2022 STRATEGIC PLAN

The Strategic Plan contains descriptions of investment goals and strategies that will guide the work of the Legacy Foundation during its first five years. The Strategic Plan's direction is supported by interviews with City agencies, community-based organizations, local philanthropies, research and strategic planning sessions conducted over a ten-year span, with emphasis on planning sessions from August 2014 through March 2015.

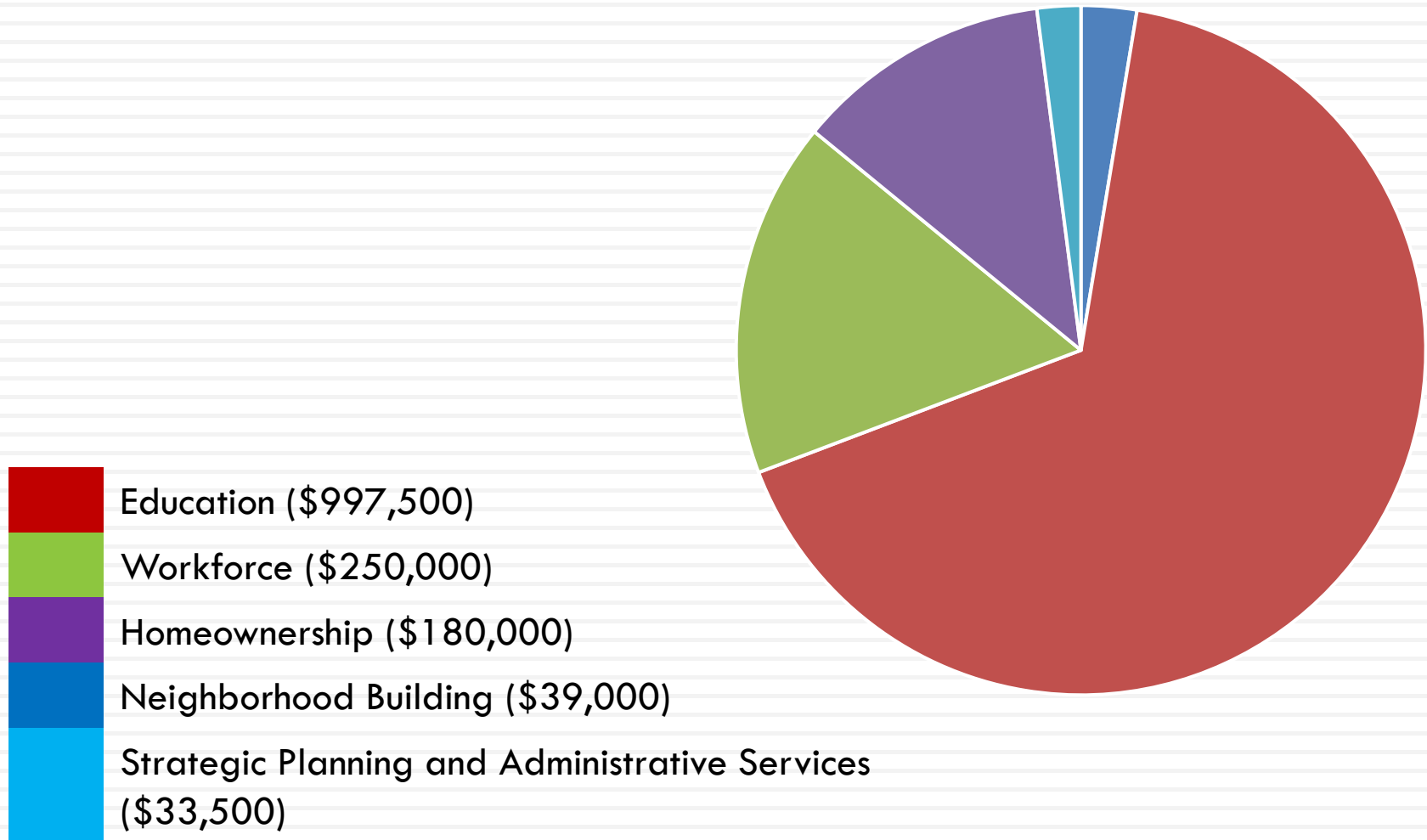
Legacy Foundation 5 Year Strategic Plan

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- Establish Strategic Priorities for 2017 – 2022
 - 1) Neighborhood Building
 - 2) Education & Workforce
 - 3) Homeownership
- Commission Approval Required
- Plan Implementation (NOFA/RFPs) in accordance with OCII Purchasing Policy

Strategic Plan Fund Allocations

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Phase 1: Strategic Plan Budget Overview

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ITEM	PHASE 1 FUNDS - PROGRAMS	PROPOSED ANNUAL BUDGET	TOTAL BUDGET (2017 – 2022)
NEIGHBORHOOD BUILDING			
1.	Community Dialogues	\$ 8,000/year for 3 years	\$ 24,000
2.	Recognition of Community Heroes	\$ 5,000/year for 3 years	\$ 15,000
	Neighborhood Building Subtotal:		\$ 39,000
EDUCATION & WORKFORCE			
1.	College Readiness and Career Skill Building	\$ 80,000/year for 5 years	\$ 400,000
2.	Scholarship Administration	\$ 4,500/year for 5 years	\$ 22,500
3.	College Living Expense Stipends	\$ 10,000/year for 5 years	\$ 50,000
4.	Construction/Contractor Assistance	\$ 250,000/year for 1 year*	\$ 250,000
5.	Hacker Hub – Computer Tech Center	\$ 25,000/year for 1 year	\$ 25,000
	Education & Workforce Subtotal:		\$ 747,500
HOMEOWNERSHIP			
1.	Homeownership Assistance Grants	\$ 180,000 over 5 years	\$ 180,000
	Homeownership Subtotal:		\$ 180,000
1.	Strategic Planning and Administrative Services	\$ 33,500	\$ 33,500
		Strategic Planning Services Subtotal:	\$ 33,500
		PHASE 1 FUNDS TOTAL	\$ 1,000,000

Phase 2: Strategic Plan Budget Overview

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EDUCATION & WORKFORCE			
ITEM	PHASE 2 FUNDS - PROGRAMS	PROPOSED ANNUAL BUDGET	TOTAL BUDGET (2017 – 2022)
1.	Legacy Bayview Lennar Scholarship	\$ 95,000/year for 5 years	\$ 475,000
2.	Legacy Will Bass Memorial Travel Abroad Scholarship	\$ 5,000/year for 5 years	\$ 25,000
	PHASE 2 FUNDS TOTAL		\$ 500,000

1) Community & Neighborhood Building

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Neighborhood Building Priorities: Increasing community knowledge of innovations and trends that can positively affect community well-being in BVHP.

Neighborhood Building Program Strategies:

1. Community Dialogues: Organize community dialogues meetings
2. Recognition of Community Heroes: Recognize Community Heroes for their contributions and leadership in the Bayview Hunters Point Community

➤ **\$39k (\$13k/year for 3 years)**

2) Education & Workforce

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Education and Workforce Priorities:

- Increase the rate of access to Science, Technology, Engineering, Art, and Math (“STEAM”) skills.
- Increase improvements in grade point average (“GPA”) and student attendance
- Increase the high school graduation rates among public school students.
- Increase the acceptance and completion rates in college/university and accredited vocational skills-building institutions.

2) Education & Workforce

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Education and Workforce Strategies:

A. College Readiness & Career Skill Building Grants;

- Tech Education Academy

B. Tuition Assistance Scholarships;

- Lennar BVHP Scholarship Program

C. Travel Scholarships to Asia and Africa

- Will Bass Memorial Scholarship

D. Contractor Assistance Program

- \$1.25 Million Total over the 5-year period

A. College Readiness & Career Skill Building

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After School Program Grant

- Fund a BVHP organization to provide instructional programming for 100 BVHP youth each year for five years.
- Targeting youth (age 11 to 18 years) and young adults (age 19 to 25 years) that either:
 - 1) Reside in BVHP; or
 - 2) Attend public middle or high schools in BVHP.
- \$400k (\$80k/year for 5 years)

A. College Readiness & Career Skill Building

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Tech Learning Center

Provides 3rd-5th grade students in BVHP with a fun and interactive introduction to STEM (Science, Technology, Engineering, Mathematics)

- On the 3rd Street Corridor
- Attracting students at an early age to STEM education and potential careers in computer coding and other technology fields.
- One-time: \$25k

B. Tuition Assistance Scholarship

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Lennar BHVP Scholarship Program

- Scholarships and educational support to make postsecondary education possible for:
 - All BVHP students
 - Up to the age of 30
- Partner with established organization to provide scholarships.
- \$475k (\$95k/year for 5 years)

C. Travel Scholarships to Asia and Africa

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Will Bass Memorial Education Scholarship

- Multi-year scholarship program for educational Travel to Africa or Asia.
- For 94124 students
- Partner with existing college or university travel abroad programs.
- **\$25k (\$5k/year for 5 years)**

D. Workforce Programs

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Contractor Mobilization Fund

- Investment in small local businesses and contractors
- Create immediate work opportunities for local BVHP workers
- Ensure full opportunity for participation by small contractors in projects involving high value contracts.
- One-Time (matching funds investment): \$250k

3. Homeownership Assistance

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Homeownership Assistance Priorities: Promote and support successful homeownership and access to homebuyer financing for qualifying low and moderate-income BVHP households.

Homeownership Assistance Program:

- Homeownership assistance and access to financial assistance
- Provide affordable and accessible homebuyer financing, including first mortgages and entry cost assistance for qualified participants.
- One-time: \$180k for 5 years

Timeline & Next Steps

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July 2016:

- Legacy Foundation Final Approval

January 2017:

- CAC Recommendation

February 2017:

- OCII Commission Approval

Spring 2017:

- NOFA/RFP Process

Projected Contracting Timeline...

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Spring 2017:

- Award Contractor Mobilization Funds

Spring 2017:

- Award Computer Tech Center Funds

Summer 2017:

- Education Program Solicitations

Solicitation Process...

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Step 1:

- OCII staff drafts solicitations based on Strategic Plan

Step 2:

- Legacy Foundation Board reviews & approves solicitations

Step 3:

- OCII advertises solicitations

Step 4:

- OCII convenes review panel
- Majority of panel will be Legacy Foundation Board members

Step 5:

- Purchasing Authority
 - Less than \$50k – OCII Executive Director
 - More than \$50k – OCII Commission Approval

Step 6:

- OCII enters into contract with service provider

