



118-2102020-002

Meeting of June 16, 2020

INFORMATIONAL MEMORANDUM

TO: Community Investment and Infrastructure Commissioners

FROM: Nadia Sesay, Executive Director

SUBJECT: Issuance of a Request for Proposals to develop, own, and operate an affordable housing mixed-use project, which will include approximately 250 units of affordable housing for low-income families and seniors, and formerly homeless families and seniors, a child care facility, neighborhood retail, and streetscape improvements on Transbay Blocks 2 East and 2 West; Transbay Redevelopment Project Area

EXECUTIVE SUMMARY

OCII is proposing, through a Request for Proposal (“RFP”) process, to offer a parcel for affordable housing development in the Transbay Redevelopment Project Area. Transbay Block 2 (“Block 2”) is an approximately 42,625 square foot rectangular site bounded by the future extension of Clementina Street to the north, Main Street to the east, Folsom Street to the south, and Beale Street to the west. The site will be divided by a planned mid-block pedestrian mews, creating two distinct building areas of approximately 19,375 square feet each – Block 2 East and Block 2 West.

The proposed affordable rental housing and retail mixed-use buildings (the “Project”) will provide one-, two-, and three-bedroom units for families, and studio and one-bedroom units for seniors. Approximately 20% of both the family and senior units will be set aside for formerly homeless households. The Project will also include a child care facility, neighborhood serving retail spaces, and publicly accessible streetscape improvements.

Applicants will work within the requirements and guidelines of Transbay, including the Transbay Redevelopment Plan which establishes general land use controls, including types and intensities of development, and the Design for Development and the

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EXECUTIVE DIRECTOR

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Development Controls and Design Guidelines which dictate height, bulk, street frontage and other design standards to determine the number of units for the site. The RFP, however, invites applicants to consider the possibility that the site could be rezoned to increase the height on portions of the parcel and to provide a narrative describing the increases in the number of units, feasibility analyses, construction costs and urban design issues associated with a rezoning.

The Project will further the city goals of increasing affordable housing and reducing homelessness in San Francisco. In addition, it will provide a needed child care facility to the growing Transbay neighborhood, along with neighborhood serving retail, pedestrian connections, and infrastructure improvements.

If the Commission has no objections or concerns, staff will release the RFP to the development community in June 2020 and proposals will be due in September 2020. The response time is lengthened to reflect additional time developer teams may need to prepare a submittal while under shelter in place restrictions. Staff anticipates returning to the Commission in December 2020 to select a developer, and in February 2021 to authorize an exclusive negotiations agreement and predevelopment loan agreement consistent with the funding estimates included in ROPS 20-21, line item numbers 413 and 416.

BACKGROUND

The Transbay Redevelopment Area, established in 2005, calls for the redevelopment of approximately 40 acres of property (approximately 10 acres of which was formerly occupied by a portion of the Embarcadero Freeway) into a vibrant new downtown neighborhood. The Redevelopment Plan is implemented through partnerships between OCII, the City, Transbay Joint Powers Authority, Caltrans, and for-profit and non-profit developers. The Project Area is divided into two zones: Zone 1, which is implemented by OCII, and Zone 2, which is implemented by the San Francisco Planning Department. When completed Transbay (including both Zone 1 and Zone 2) will include:

- Approximately 4,240 new residential units, 35% of which will be affordable;
- 2.6 million square feet of office space and 200,000 square feet of retail space;
- Approximately 9 acres of parks, including the 5.4-acre Salesforce Park (located on the roof of the Salesforce Transit Center), 1-acre Transbay Block 3 Park (to be located on the block to the north of Transbay 2), and 2.5-acre Under-Ramp Park;
- Significant transportation improvements, including the Salesforce Transit Center, a regional hub connecting 11 transit systems and serving as the future terminus for Caltrain and high speed rail; and
- Streetscape improvements including the redesign of Folsom Street, widened sidewalks, and pedestrian-oriented alleys.

Within Zone 1, a total of 1,804 residential units have been completed (Blocks 6, 7, 8, 9, and 11a), 565 of which are affordable to low-income households. Another 392 units in Block 1 are under construction and are nearing completion. Additional housing units are planned for Block 2 (the subject of this proposed RFP), Block 4, and Block 12.

DISCUSSION

OCII staff has prepared a draft RFP for the development of Transbay 2, included as Attachment B to this memorandum. The RFP will be posted on the OCII website and extensive notification of the RFP will be provided to community groups, developers, architects, contractors (including Small Business Enterprises and minority- and woman-owned contractors), other community stakeholders through OCII's Citizens Advisory Committees email lists, the Mayor's Office of Housing and Community Development's ("MOHCD") RFP/RFQ interest email list, and newspaper advertising.

In the event that a shelter-in-place order is in effect or gathering in groups remains inadvisable due to COVID-19, OCII will accept Applicant registrations electronically and hold the pre-submission meeting online. Meeting details will be posted to OCII's website and circulated to the above-noted groups. In addition, OCII may conduct Applicant interviews and present Applicant selection recommendations to the Transbay Citizens Advisory Committee and OCII Commission through online meetings.

To expedite development, OCII is seeking submittals from qualified teams comprised of: a for-profit or non-profit housing developer and non-profit co-developer, lead design architect, qualified supportive services provider, and property manager (together, the "Applicant") to develop and manage approximately 250 units of affordable rental housing units on Transbay 2.

Upon completion of this project, OCII's assets related to the site will be transferred to MOHCD, which is the designated Housing Successor Agency under Dissolution Law. MOHCD has reviewed the RFP, will participate in the selection of the development team, and will review and comment on the Project's financial underwriting and funding and disposition documents in order to ensure a smooth transition to MOHCD at project completion.

Development Program

Staff seeks submittals that:

- Provide for the development of affordable rental housing for families and seniors while minimizing local financial subsidy according to the following program requirements:

Transbay Block 2 Development Program Guidelines	
Number of units	Approximately 250 units featuring high quality architecture and livable design

Unit types	Family units: 1-, 2-, and 3-bedroom units Senior units: studio and 1-bedroom units
Populations	Families: low-income families; 20% of family units designated for formerly homeless households Seniors: low-income seniors age 62+; 20% of senior units designated for formerly homeless senior households
Pedestrian amenities and street improvements	Pedestrian mews through the center of the site, creating a connection from Folsom Street to Clementina Street and the planned Transbay Block 3 Park Beale Street Clementina Street sidewalks and streetscape improvements Main Street linear park Folsom Street sidewalks and related streetscape improvements
Retail and non-profit spaces	Ground floor neighborhood-serving retail along Folsom Street and wrapping onto the pedestrian mews
Child care facility	Ground floor dedicated indoor and outdoor space for a child care facility serving a minimum of 45 children, ages 0 to 5
Parking	No residential parking; minimal parking for staff and deliveries Class I bicycle parking at a 1:1 ratio for family units and 1:5 for senior units

- Meet design standards established in the Transbay Design for Development and Development Controls and Design Guidelines;
- Provide a plan for resident services addressing needs specific to both family and senior households, and specifically describing case management and supportive services to be performed by a provider with experience serving formerly homeless populations;
- Provide thoughtful community spaces that address the needs of the resident populations;
- Provide a marketing plan to discuss efforts to facilitate leasing to diverse communities, with a focus on outreach to Certificate of Preference holders;
- Provide a retail plan that targets businesses that will benefit Block 2 residents as well as the neighborhood as a whole, focuses tenant outreach on locally owned small businesses, and outlines a strategy for engaging with city agencies and non-profit organizations who provide resources and assistance to local start-ups and entrepreneurs;
- Provide a program that incorporates excellent, visually interesting design and financial feasibility; and,
- Incorporate “green” and sustainable building strategies in accordance with the City’s requirements.

In furtherance of long-standing City objectives to increase affordable housing, the RFP notes that, pending further studies and community engagement, OCII may consider a measured height increase on a portion of Block 2. Applicants are asked to consider the impacts of a height increase and provide a narrative describing their approach, including the potential increase in number of units, operational feasibility, changes to financial feasibility and construction costs, urban design and shadow considerations, and the experience of the team with entitlement processing and community outreach.

Financing

Funding will likely come from a number of sources including but not limited to 4% low-income housing tax credits with tax-exempt bonds, OCII subsidy, California Department of Housing and Community Development funds, Federal Home Loan Bank Affordable Housing Program funds, and any other outside funding developers deem applicable. Additionally, the City will contribute an operating subsidy for the units set aside for formerly homeless households through the Local Operating Subsidy Program.

Contracting and Work Force Hires

The selected Applicant(s) will be required to perform extensive good faith efforts to include Small Business Enterprises (“SBEs”) in the performance of any agreement resulting from the RFP and any subsequent agreements between a selected development team and its contractors or consultants as required by OCII’s Small Business Enterprise (“SBE”) Policy. The SBE Policy ensures equity in small business contracting with an objective of meeting an overall SBE participation goal of 50% established by the OCII Commission. The selected Applicant will also comply with OCII’s Construction Workforce Requirements to ensure that all contractors/subcontractors demonstrate good faith efforts to meet OCII’s workforce hiring goals of 50% for San Francisco residents.

In addition to these good faith efforts, the selected Applicant team will be expected to create a meaningful associate architect opportunity for a San Francisco-based SBE, even if the primary architect is an SBE, targeting a scope that constitutes approximately 35% of the design contract. The selected general contractor will also be strongly encouraged to create a joint venture or similar partnership relationship with a San Francisco-based SBE contractor(s) looking to gain experience in that role.

The selected Applicant will also submit a Workforce and Contracting Action Plan (“WCAP”) that addresses how the team will implement equal opportunity programs, which include the following policies and programs: Small Business Enterprise Policy, Nondiscrimination in Contracts and Benefits, Minimum Compensation Policy, Health Care Accountability Policy, and Prevailing Wage Policy. Applicants may elect to develop the WCAP with in-house staff or an outside consultant.

COMMUNITY OUTREACH

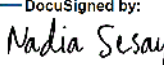
OCII staff initially presented the proposed program and draft RFP for Block 2 to the Transbay Citizens Advisory Committee (“CAC”) in June 2018. Due to construction issues at the Salesforce Transit Center and the need to temporarily return the Block 2 site to its previous use as the temporary terminal, OCII did not proceed with issuing the RFP at that time. Staff provided a subsequent update to the CAC in October 2019. CAC and community members confirmed the need for additional childcare in the neighborhood and were in support of the planned child care facility. In addition, CAC members expressed a desire to add ground floor retail to the frontage along the future extension of Clementina Street. CAC members felt that a retail use may help to activate the planned park on Block 3. OCII staff revised the RFP to direct applicants to consider retail on the Clementina Street frontage.

Most recently, OCII staff provided an informational update to the Transbay CAC on June 11, 2020. Staff further reviewed the program for the site and advised CAC members that the RFP had been updated to request that, in addition a complete zoning compliant submittal, applicants provide a brief narrative considering limited additional housing units through a measured height increase on Block 2.

NEXT STEPS

Staff intends to release the RFP in June 2020 and responses will be due in September 2020. Upon receipt of the Applicants’ submittals, OCII staff will verify completeness and only complete responses will be evaluated. An evaluation panel consisting of OCII staff as well as representatives from MOHCD, HSH, and the Transbay CAC will then review the complete responses to determine the extent to which they demonstrate the qualifications as specified in the RFP and interview Applicant teams. Following scoring by the evaluation panel, a presentation will be made to the CAC, and staff will then recommend an Applicant team for selection. Additionally, staff anticipates seeking authorization to enter into an exclusive negotiations agreement and to enter into a loan agreement for predevelopment funding in February 2021.

(Originated by Kim Obstfeld, Development Specialist)

DocuSigned by:

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Nadia Sesay
Executive Director

Attachment A: Transbay Project Area Map

Attachment B: Draft Request for Proposals, Transbay Block 2 East and 2 West

TRANSBAY REDEVELOPMENT PROJECT AREA

Attachment A



Under-Ramp Park
Acres: 2.4



Block 9
500 Folsom St.

Developers: Essex/ BRIDGE
Affordable Rental Units: 109
AMI: 50% & below
Market-Rate Rental Units: 428
Total Units: 537
Construction Start: 2016
Completion: 2020

Parcel F

Developers: Hines/Urban Pacific/Goldman Sachs
Total Units: 175 (est.)
Office Sq. Ft.: 287,000
Hotel Rooms: 250
Construction Start: 2020
Completion: 2024

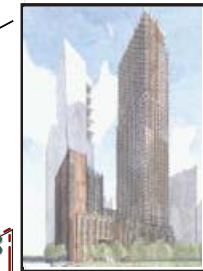
Parcel T
101 First St.
Salesforce Tower

Developers: Boston Properties/Hines
Office Sq. Ft.: 1.4 Million
Construction Start: 2014
Completion: 2017

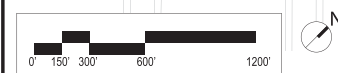
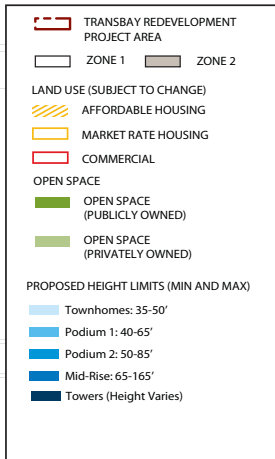
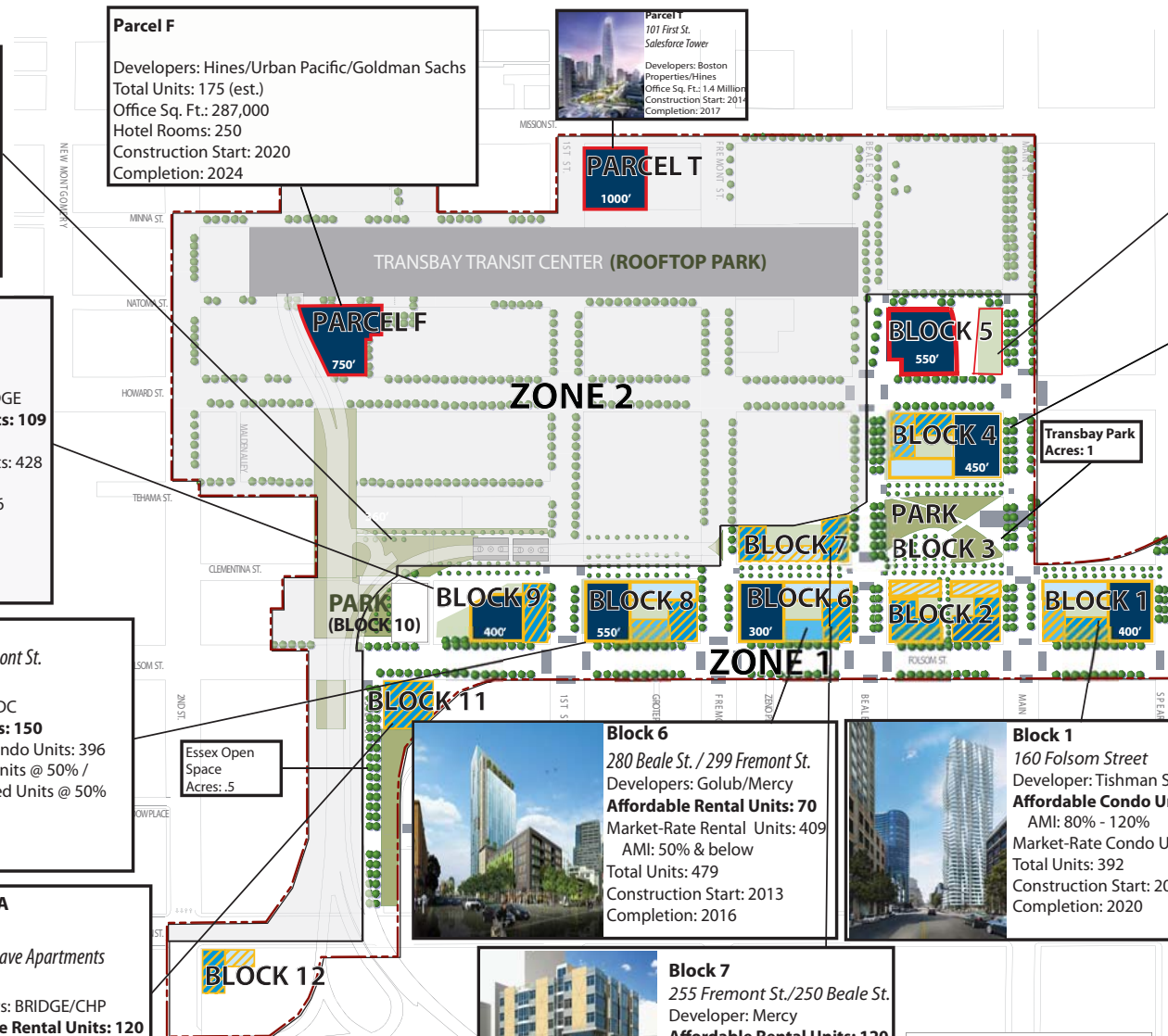


Block 5
250 Howard St.
Park Tower

Developers:
Golub/
John Buck
Office Sq. Ft.: 767,000
Construction Start: 2015
Completion: 2018



Block 4
Developer: Hines/Urban Pacific/
Goldman Sachs
Affordable Rental Units: 336
AMI: 45% - 100%
Market-Rate Rental & Condo
Units: 347
Construction Start: 2021
Completion: 2024



Block 11A
25 Essex St.
Rene Cazenave Apartments

Developers: BRIDGE/CHP
Affordable Rental Units: 120
AMI: 50% & below
Total Units: 120
Construction Start: 2011
Completion: 2013

Block 6
280 Beale St. / 299 Fremont St.
Developers: Golub/Mercy
Affordable Rental Units: 70
Market-Rate Rental Units: 409
Total Units: 479
AMI: 50% & below
Construction Start: 2013
Completion: 2016

Block 1
160 Folsom Street
Developer: Tishman Speyer
Affordable Condo Units: 156
AMI: 80% - 120%
Market-Rate Condo Units: 236
Total Units: 392
Construction Start: 2017
Completion: 2020

Block 7
255 Fremont St./250 Beale St.
Developer: Mercy
Affordable Rental Units: 120
AMI: 50% & below
Construction Start: 2016
Completion: 2018



Housing Development

Request for Proposals

To develop, own, and operate mixed-use affordable rental family and senior housing units, including units set-aside for formerly homeless family and senior households at:

Transbay Blocks 2 East and 2 West

(located between Beale Street, Folsom Street, Main Street, and Clementina Street)

Transbay Redevelopment Project Area

Deadline for Submission
4:00 p.m. – September 17, 2020

Issued by:
Office of Community Investment and Infrastructure
One South Van Ness Avenue, Fifth Floor
San Francisco, CA 94103

Contact: Kim Obstfeld
Email: kimberly.obstfeld@sfgov.org
Phone: (415) 749-2447



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SECTION I. SUMMARY

The Office of Community Investment and Infrastructure (“OCII”), acting as the Successor Agency to the San Francisco Redevelopment Agency (“SFRA”), is seeking submittals from qualified applicants to develop, own, and operate affordable rental housing in a project that serves low-income families and formerly homeless families, and in a project that serves low-income seniors and formerly homeless seniors on Transbay Blocks 2 East and 2 West (“Transbay 2” or the “Project”) in the Transbay Redevelopment Project Area (“Project Area”).

An applicant (“Applicant”) is defined as a team comprised of only the following: a lead non-profit or for-profit housing developer (“Developer”) and a non-profit housing co-developer (“Co-Developer”) (together, “Developers”), a property manager, an architect, a Workforce and Contracting Action Plan (“WCAP”) consultant (if an outside consultant is being proposed), and a supportive services provider. All other consultants will be selected after an Applicant is selected, in accordance with OCII’s Small Business Enterprise (“SBE”) Program. Applicant members may consist of permanent joint-venture partnerships if they so choose. A Developer/Co-Developer joint venture is required (Applicants may choose to include more than one Co-Developer).

The subject property of this Request for Proposals (“RFP”) is an approximately 42,625 square foot (0.98 acre) rectangular site bounded by the future extension of Clementina Street to the north, Main Street to the east, Folsom Street to the south, and Beale Street to the west (“Block 2” or the “Site”). The Site will be divided by a planned mid-block pedestrian passage or mews, creating two distinct building footprints of approximately 19,375 square feet each – Block 2 East and Block 2 West. Details on the population to be served and design specifics can be found in Section IV Development Program in this RFP. A summary of some of the programming required for the Site is provided in the table below.

Transbay 2 Program Requirement Summary	
Number of units	Approximately 250 total units featuring high quality architecture and livable design
Unit types	In separate facilities: - Family units (a minimum of 80 units): 1-, 2-, and 3-bedroom units - Senior units: studio and 1-bedroom units
Populations	Families: low-income families; approximately 20% of family units designated for formerly homeless households Seniors: low-income seniors age 62+; approximately 20% of senior units designated for formerly homeless senior households
Area median income (AMI) and rent restrictions	Tiered income levels up to 80% MOHCD AMI, provided that the average AMI of all affordable units is at or below 60% AMI
Pedestrian mews	Active, publicly accessible pedestrian crossing through the center of the site, creating a connection from Folsom Street to Clementina Street (and the Block 3 Park)
Retail	Ground floor neighborhood-serving retail along Folsom Street and wrapping the frontage around the corner to the pedestrian mews
Child care space	Ground floor dedicated indoor and outdoor space for a child care facility serving a minimum of 45 children, ages 0 to 5
Streetscape improvements	- Beale Street and Clementina Street sidewalks - Main Street linear park (30' sidewalk and related improvements) - Folsom Street sidewalks (25') and related streetscape improvements
Parking	Assume no residential parking At-grade loading to serve residential and commercial uses, child care loading

	Class I bicycle parking spaces at a 1:1 ratio for family units and 1:5 for senior units
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Block 2 is part of the Project Area that was administered by the former SFRA. Pursuant to state law, redevelopment agencies throughout the State of California were eliminated on February 1, 2012, California Health and Safety Code §§34161 et seq (the “Redevelopment Dissolution Law”). OCII is the Successor Agency to SFRA and is responsible for implementing SFRA’s enforceable obligations. On April 15, 2013, the California Department of Finance determined “finally and conclusively” that the Transbay Implementation Agreement, Affordable Housing Program, and Tax Increment Sales Proceeds Pledge Agreement are enforceable obligations under Redevelopment Dissolution Law.

The Redevelopment Plan for the Transbay Redevelopment Project Area (“Redevelopment Plan”) and related documents, such as the Transbay Redevelopment Project Area Design for Development (“Design for Development”) and Development Controls and Design Guidelines for the Transbay Redevelopment Project (“DCDG”), govern the development of the Project Area. OCII will select the development team and issue all project approvals for Transbay 2. Upon completion of the Project, OCII’s housing assets related to the Site will be transferred to the Mayor’s Office of Housing and Community Development (“MOHCD”), which is the designated Housing Successor under Redevelopment Dissolution Law. MOHCD will therefore participate in the selection of the development team and will also review and comment on the Project’s financial underwriting, funding, and disposition documents in order to ensure a smooth transition to MOHCD at project completion.

The OCII Executive Director will recommend an Applicant for the OCII Commission’s consideration after receiving the evaluation results of an interdisciplinary panel comprised of representatives from OCII, MOHCD, the Department of Homelessness and Supportive Housing (“HSH”), and the Transbay Citizen’s Advisory Committee (“CAC”). The panel will evaluate the Applicant’s proposed development concept as well as demonstrated successful experience on comparable projects. The Transbay CAC will review the panel’s evaluation and will also make a recommendation prior to the OCII Commission’s consideration of an Applicant.

The Executive Director is not required to recommend the Applicant receiving the panel’s highest ranking or evaluation, but may consider other factors, including the fulfillment of OCII policy objectives, in making a written recommendation to the Commission. The OCII Commission has the sole discretion to make the final selection. **OCII may, in its sole discretion, disqualify any Developer and/or Architect or other partner if they have any uncured defaults on any OCII, SFRA, or MOHCD agreement within the past five (5) years.**

Applicants are advised that OCII is committed to promoting opportunities for SBEs and the local workforce in the contracting process and the payment of prevailing wages. Upon selection of an Applicant, OCII will seek to enter into an exclusive negotiation agreement with the selected Developers that will lead to a long-term ground lease for the Site.

SECTION II. IMPORTANT DATES & SUBMISSION PROCESS

A. Important Dates

Submittals are due by 4:00 p.m. on September 17, 2020.

1. Issue Date: RFP available on the OCII website, registration opens (\$50.00 registration fee <u>by check only, sent by mail</u> , is required)	June 22, 2020
2. Pre-Submission Meeting ¹ (Location (if held in-person): 1 South Van Ness, 5 th Floor, Room 5080)	9:30 a.m. July 15, 2020
3. Deadline for written questions / requests for additional information	July 22, 2020

4. PROPOSAL SUBMISSION DEADLINE	4:00 p.m. September 17, 2020
5. Notification to Developer Teams who failed to meet minimum submission requirements	September 30, 2020
6. Developer Team interviews ¹	Week of October 12, 2020 ²
7. Submittals evaluated and ranked by Evaluation Panel	
8. Presentation of Panel's Selection to Transbay Bay Citizens Advisory Committee ¹	November 12, 2020 ²
9. OCII Commission consideration of Executive Director's recommendation of a developer team selection ¹	December 1, 2020 ²
10. OCII Commission approves Exclusive Negotiations Agreement and Predevelopment Loan	February 2, 2021 ²

¹ If shelter in place orders are in effect or if group meetings remain inadvisable, the pre-submission meeting, Developer Team interviews, and/or CAC and OCII Commission meetings may be conducted as video calls

² These dates and times are proposed and subject to change.

B. Pre-Submission Meeting

A pre-submission meeting will be held at OCII's offices, located at 1 South Van Ness Avenue, 5th Floor in Room 5080, on the date and time shown above, in Section II.A. The purpose of the meeting is to ensure that all potential Applicants understand the programmatic design and financing information that is required. Although attendance is not mandatory, it is highly recommended. In the event that an in-person meeting cannot be safely held due to concerns regarding COVID-19, the pre-submission meeting will instead be held via video call. A registration link for the video call will be posted to the OCII website.

C. Questions and Requests for Additional Information

Please submit all questions and information requests to the attention of the contact person listed on the cover page of this RFP. All questions and requests for additional information regarding this RFP must be received **in writing** by OCII (via e-mail) – *on or before* – the time and date as shown above, in Section II.A. Questions received after the deadline may not be answered. All responses and additional information will be distributed to all registered Applicants. OCII reserves the right, in its sole discretion, to determine the timing and content of the response, if any, to all questions and requests for additional information. In addition, OCII may respond via mail or e-mail.

D. Registration and Fee for RFP Packet Required

Responses to this RFP will be accepted only from those Applicants who have registered with OCII by e-mailing registration information to Kimberly.obstfeld@sfgov.org and paying a non-refundable registration fee of fifty dollars (\$50.00), by check only (payee: OCII) mailed to OCII at 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103. Only registered Applicants will receive answers to submitted questions as well as a link to upload submittal packages. RFP packets will be available on and following the issue date listed in Section II.A., above, online at <https://sfocii.org/rfp>.

E. Submission Time, Place, Date, Contact

Electronic submittals must be uploaded by the date and time shown below. Registered Applicants will receive submittal instructions, including an OneDrive link to upload submittal materials. In addition, by the date and time shown below, Applicants must submit one (1) original hard copy plus four (4) hard copies of the submittal. Hard

copies must be received at the address shown below. The MOHCD receptionist will collect and timestamp all submittals on behalf of OCII.

Electronic Submittal Deadline: September 17, 2020 at 4:00 p.m.

Via OneDrive link provided to registered Applicants

Hard Copy Submittal Deadline: September 24, 2020 at 4:00 p.m.

Office of Community Investment and Infrastructure
One South Van Ness Avenue, Fifth Floor
San Francisco, California 94103
Attn: Kim Obstfeld

In the event that OCII offices are closed on the above date for hard copy submittals due to COVID-19, this date may be revised or the requirement for submittal of hard copies may be eliminated. In the event that a change to the instructions above is necessary, registered Applicants will receive alternate instructions via e-mail for hard copy submittal.

SECTION III. BACKGROUND

A. Project Area Overview

The Site for the Project is located in the Transbay Redevelopment Project Area. OCII's Transbay web page (<http://sfocii.org/transbay>) provides links to the following documents that should be reviewed and considered as Applicants prepare submissions:

- Redevelopment Plan
- Transbay Redevelopment Project Implementation Agreement
- Boundary and Zoning Map
- Development Controls and Design Guidelines
- Design for Development
- Transbay Streetscape & Open Space Concept Plan
- Folsom Streetscape Improvement Plans
- Transbay Final Environmental Impact Report and Addenda 1-8

1. Overview of the Transbay Project Area

The Project Area, established in 2005, calls for the redevelopment of approximately 40 acres of property (approximately 10 acres of which was formerly occupied by a portion of the Embarcadero Freeway) into a vibrant new downtown neighborhood. The Redevelopment Plan is implemented through partnerships between OCII, the City, Transbay Joint Powers Authority ("TJPA"), Caltrans, and for-profit and non-profit developers. The Project Area is divided into two zones: Zone 1 is implemented by OCII and Zone 2 is implemented by the San Francisco Planning Department. When completed, the Transbay Redevelopment Area (including both Zone 1 and Zone 2) will include:

- Approximately 4,243 new residential units, 35% of which will be affordable;
- 2.6 million square feet of office space and 200,000 square feet of retail space;
- 9.2 acres of parks, including the 5.4-acre Salesforce Park (located on the roof of the Salesforce Transit Center), the approximately 1-acre Block 3 Park (to be located directly north of Transbay 2), and 2.5-acre Under-Ramp Park;
- Significant transportation improvements, including the Salesforce Transit Center, a regional hub connecting 11 transit systems and serving as the future terminus for Caltrain and high speed rail; and
- Streetscape improvements including the redesign of Folsom Street, widened sidewalks, bicycle facilities, and pedestrian-oriented alleys.

Within Zone 1, a total of 1,804 residential units have been completed (unit construction is complete on Blocks 6, 7, 8, 9 and 11a), 565 of which are affordable to low-income households. Another 392 units are under construction (Block 1). Additional housing units are planned for Block 2 (the subject of this RFP), Block 4, and Block 12.

Construction is also complete on Salesforce Tower (Parcel T), which features 1.4 million square feet of office space and 10,600 square feet of retail, and on Park Tower (Block 5), which includes 767,000 square feet of office space and 8,642 square feet of retail. The Salesforce Transit Center opened in August 2018, subsequently closed for repairs, and reopened in July 2019.

2. Development Controls

The Redevelopment Plan establishes general land use controls, including types and intensities of development and public open space in the Project Area. The companion Design for Development establishes the urban design vision for the Project Area, and the DCDG establishes detailed height, bulk, parking, street frontage and other design standards and guidelines to guide development within Zone 1.

The Transbay Redevelopment Project Area Streetscape and Open Space Concept Plan provides guidance for improvements to the public realm. In addition, the Folsom Street Schematic Design and Improvement Plans establish detailed specifications for Folsom streetscape improvements (which are currently under construction on non-OCII blocks from 2nd Street to Spear Street), including street furnishings, sidewalk materials, plantings, and more.

3. Neighborhood and Transit Amenities

The Transbay neighborhood is rich in amenities. There are numerous retail outlets within walking distance of Block 2 or reachable by a short ride by bicycle or Muni. Two pharmacies, a post office, the Embarcadero YMCA, and several restaurants are located within half a mile of the Site. Woodlands Market is located directly across Folsom Street. Target, Safeway, Trader Joe's, Whole Foods, and the Ferry Building farmer's market are located within one mile of the Site.

The Site is within a mile and a half from the Bessie Carmichael Elementary and Middle School campuses, Gordon J. Lau Elementary School, the Chinese Education Center, and John Yehall Chin Elementary School.

As previously noted, the Project Area will include over nine acres of new parks. The completed Salesforce Park is located within close walking distance from the Site. The Block 3 Park will be directly north of the Site and Under Ramp Park will be located approximately two blocks west of the Site. The existing Rincon Park and adjacent San Francisco Bay Trail are two blocks from the Site.

Block 2 is well served by local and regional transit. The Site is located two blocks from the Salesforce Transit Center which provides regional transit as well as local bus connections to neighborhoods throughout San Francisco. Block 2 is also less than half a mile from the Embarcadero BART station and multiple muni rail lines along Market Street and the Embarcadero.

Improvements to Folsom Street started in summer 2019. When complete, the improved street will include cycle tracks from 2nd Street to Spear Street, providing dedicated lanes for bicyclists that will connect to the City's existing bicycle network.

In addition to cycle tracks on Folsom Street, the San Francisco Municipal Transportation Agency ("SFMTA") is currently studying the addition of cycle tracks along Beale Street between the Embarcadero and Market Street, adjacent to the Block 2 sidewalk. The selected Applicant will be expected to coordinate with OCII and SFMTA on the design and implementation of this improvement.

4. Citizens Advisory Committee

The Transbay CAC is an advisory body comprised of residents, business owners, and representatives of community organizations in the Project Area that advises OCII on matters that affect design in Zone 1. A member of the CAC will review proposals in response to this RFP and will participate in the evaluation panel. The recommended

Applicant will present their proposal to the CAC prior to Commission action. The CAC will again review the selected design concept when the Project proceeds to seek Schematic Design approval.

5. California Environmental Quality Act/ National Environmental Protection Act

On April 20, 2004, the Agency Commission certified the Environmental Impact Report (EIR) for the Transbay Redevelopment Plan. On January 25, 2005, the Agency Commission adopted findings under the California Environmental Quality Act (CEQA), a Statement of Overriding Considerations, and a Mitigation Monitoring and Reporting Program in connection with the adoption of the Redevelopment Plan. The Board of Supervisors, Planning Commission, and Transbay Joint Powers Authority (TJPA) adopted similar findings.

The Agency Commission, Board of Supervisors, and TJPA subsequently adopted eight addenda to the Final EIR. Addendum 1 (2006) evaluated modifications to the Transbay Transit Center design and revisions to the temporary terminal site plan. Addendum 2 (2007) evaluated modifications of the rail tracks and underground tunnels leading to the Transbay Terminal. Addendum 3 (2008) evaluated adding 546 Howard Street to the list of properties identified for full acquisition. Addendum 4 (2008) evaluated the configuration and design elements of the temporary terminal. Addendum 5 (2009) evaluated the exterior façade and pedestrian bridge elements of the Transbay Transit Center. Addendum 6 (2011) evaluated bus exit and ramp design refinements for connections from Interstate 80 to the Transbay Transit Center. Addendum 7 (2013) evaluated refinements to the relocation of Golden Gate Transit's mid-day bus parking facility. Addendum 8 (2016) assessed an increase in the maximum height limit on Block 1 from 300 to 400 feet.

The selected team will work with the Department of Public Health, the San Francisco Bay Regional Water Quality Control Board, the Bay Area Air Quality Management District and OCII staff to ensure proper CEQA coverage and that the mitigation monitoring measures for Block 2 are appropriately documented and implemented.

The selected Applicant will be responsible for securing environmental review approval under the National Environmental Protection Act (NEPA), if necessary.

6. Additional Environmental Reports for the Transbay Area

OCII has two earlier environmental reports for the Transbay area (available upon request):

- Tar Flat 19th Century Solutions, 20th Century Hazards, Caltrans SF-480 Terminal Separation Rebuild, Study of Historic Potential Hazardous Material Sites, 1993
- Site Investigation Report, San Francisco-Oakland Bay Bridge West Approach Project Including Transbay Terminal Loop, 1999

The selected Applicant should expect to engage an archaeologist to study the Site during predevelopment. Previous studies indicate that a buried ship may be located in the fill below the surface. In addition, the site may contain artifacts from a former iron works operation or other functions from the 1800s and early 1900s.

7. Soil Conditions

According to Figure 4.8-1 of the Transbay Final EIR, the Site is located on the bay side of the historic circa 1848 shoreline. Soils on the Site may generally be characterized by the presence of soft and compressible Bay Mud under the superficial fill placed when the area was reclaimed in the late 1800s or early 1900s. The depth of the sediments varies substantially, as do fill materials.

Developers should incorporate the cost of appropriate structural systems in their proposed Sources and Uses Budgets. The selected Applicant will need to conduct its own geotechnical investigations specific to the Site.

B. The Site & Transfer of Ownership

The Site is currently part of Assessor's Block 3739, which also encompasses the future sites for Transbay Blocks 3 and 4 as well as extensions of Clementina Street and Tehama Street. The proposed Block 2 parcel is a flat, rectangular, approximately 42,625 square foot lot with frontages as follows: 275.01 feet along the future extension of Clementina Street and Folsom Street, and 155 feet along Main Street and Beale Street. Planned site dimensions

are shown in the DCDG. Note that site dimensions are subject to revision until approval of the transfer map (anticipated in summer 2020).

Until recently, the Site was used as the temporary Transbay Terminal and Greyhound station. These uses have been relocated to the new Transbay Transit Center. The land is owned by TJPA. OCII and TJPA will execute and record an option agreement or similar document on the Site prior to final disposition. TJPA will transfer fee simple ownership to OCII prior to or concurrently with the close of construction financing for the Project. At that time, OCII will convey the site to the selected Developer(s) in an “as is” condition through a long term ground or air rights lease (or leases).

Once the Project is constructed and occupied, OCII will transfer the lease(s) and the underlying land, against which the lease(s) will be recorded, to MOHCD as the Housing Successor pursuant to Redevelopment Dissolution Law. Assuming the Applicant will require site control in order to access certain funding sources, OCII will enter into an appropriate agreement with the Applicant in order to meet the site control requirements of the approved potential funding source(s).

An address for the Site has not yet been determined.

SECTION IV. DEVELOPMENT PROGRAM

A. Housing Development Concept

OCII’s goal for the Site is the development of two distinctive but complementary mixed-use buildings on 2 East and 2 West, with residential units and amenities thoughtfully designed to meet the needs of a variety of household types. The design must incorporate community-serving uses including an active pedestrian mews, neighborhood retail, and a child care facility. The Project will be presented in a high quality, livable design based on Design for Development and DCDG standards serving low-income families and seniors, as well as formerly homeless families and seniors.

OCII has assumed that the family units and amenities (“Family Project”) would be located on 2 West and the senior units and related amenities (“Senior Project”) would be located on 2 East, however, Applicants should carefully consider the proposed configuration and delineation of the family and senior housing components and may propose any recommended configuration that best utilizes the space and optimizes building functionality and operations. The Family Project and Senior Project must be separate to ensure compliance with federal and state fair housing law. The proposed configuration should be thoroughly described in the proposal submittal and consistent with the DCDG.

The ground floor should include neighborhood-serving retail on the Folsom Street frontage wrapping around to the pedestrian mews, a child care facility and attached dedicated outdoor space, residential entries and lobbies, and townhomes or stacked flats (with individual unit entries and stoops) along Clementina Street. Additionally, Applicants should study and may propose limited retail frontage along Clementina Street.

Future retail uses should serve the needs of building residents as well as the surrounding community. Applicants must target retail tenant outreach to locally owned small businesses, in collaboration with the San Francisco Office of Economic and Workforce Development (“OEWD”) and/or non-profit organizations such as La Cocina that provide resources and assistance to local start-ups and entrepreneurs. To further accommodate start-up businesses, Applicants may explore opportunities to incorporate or allow for “pop-up” (short-term) or other innovative retail elements on the site. These elements may serve to further activate the public realm and provide opportunities for new or experimental businesses that may not have the resources to complete tenant improvements and enter into a long-term lease. The selected Applicant will be expected to initiate this outreach early in predevelopment and utilize relevant feedback to inform the design.

Development shall proceed in accordance with this RFP, the requirements of the Redevelopment Plan and related documents, and all other applicable federal, state and local regulations. Working within these parameters, the

Applicant may use some discretion regarding unit count, unit sizes, and building layouts provided that the Project is suitable for senior and family housing and the other uses described herein.

The below table summarizes the OCII programming guidelines for the Site:

Program Element	Requirements
Target Populations	• Families - o Low-income families at a range of income levels - o Approximately 20% of family units set aside for homeless families • Seniors - o Low-income seniors at a range of income levels - o Approximately 20% of senior units set aside for homeless senior individuals/ households • For both family and senior units, Applicants may propose tiered income levels up to 80% MOHCD AMI, however, the average AMI must be at or below 60% MOHCD AMI. • Income tiers for all units should be targeted to meet the needs of Certificate of Preference (“COP”) holders.
Units	• Approximately 250 total units • Family units (minimum 80 total family units, a greater number of family units is desirable): - o 30% 1-bedroom/1-bathroom, minimum of 550 net square feet - o 50% 2-bedroom/1 or 1.5 bathroom, minimum of 850 net square feet - o 20% 3-bedroom/1.5 or 2 bathroom, minimum of 1,100 net square feet • Senior units: - o 80% 1-bedroom/1-bathroom units, minimum of 550 net square feet - o 20% studio/1-bathroom units, minimum of 400 net square feet
Homeless-Serving Units	• Tenants will be referred to the Site by HSH, prioritized by need/vulnerability and length of homelessness, based on the parameters of the City’s Coordinated Entry process • Unit sizes should match overall unit size mix as described above • Units will be supported by the Local Operating Subsidy Program (LOSP) and a services contract with HSH • OCII may, at its discretion, require that the Applicant increase, decrease or eliminate the percentage of units set aside for formerly homeless households. The final number/percentage will be determined based on appropriate staffing ratios, overall financial feasibility for both the Senior Project and Family Project, and availability of operating subsidies and services funding.
Senior-Serving Units	• The Senior Project “must be designed to meet the physical and social needs of seniors.” California Civil Code § 51.2 (d); Government Code § 12955.9 (b) (2) • Senior Project units and facilities should incorporate design features to accommodate ease of use and aging in place
Interior Services and Management Space	• Desk staff at main residential entrance(s) • Dedicated, private offices for property management and support services staff with adequate room for storage of client records and seating for one-on-one sessions
Interior Common Space	• At least one common area/community room/multi-purpose room each for the Family and Senior Projects; kitchens should be incorporated into these spaces

	• At least one laundry room each for the Family Project and the Senior Project with the correct ratio of machines to number of units
Public Open Space	• 25' wide north-south publicly accessible pedestrian mews, creating a physical and visual connection between Folsom Street and Clementina Street, and across to the future Block 3 Park • Public pedestrian streetscape amenities (further described below) per the Streetscape and Open Space Concept Plan (subject to change by OCII) and Folsom Streetscape Improvement Plans
Private Common Open Space	• Community open spaces serving seniors and families in locations convenient to residents
Retail Space	• Ground floor retail along Folsom Street, wrapping the corners onto the mews • Retail should be neighborhood-serving and tenant outreach should be targeted to locally owned enterprises and start-ups • Study and consider proposing limited retail frontage along Clementina Street, either at the corner of Main or Beale or at the mews (the Transbay CAC has expressed a desire for retail that contributes to activating the future park) • Active use entries are encouraged to be located along the pedestrian mews. Consider locating at least one restaurant or café on the mews that potentially activates both the mews and Folsom Street with outdoor seating. • Ensure that spaces provide the appropriate infrastructure to facilitate food-related uses, such as a small grocer or shop offering prepared foods • Built to cold shell condition (per MOCHD Commercial Underwriting Guidelines) • Storefronts should maximize transparency (see DCDG for specific standards)
Child Care Space	• Licensable for a minimum of 45 children, ages 0 to 5, with appropriate dedicated indoor space and outdoor play space • Space should accommodate infant sleeping area, toddler and/or preschool classrooms, offices, separate bathrooms for children and staff, kitchen/prep area, and storage. • Space should not have frontage along Folsom Street • See Attachment 20 for detailed space requirements • A minimum of 20% of the slots will be set aside for low-income families, however, it is expected that the final percentage will be significantly higher. Transbay 2 residents will have a preference for the low-income slots. • A RFP for a child care operator will be developed in collaboration with the City's Office of Early Care and Education. • Assume that the child care space will be leased at a nominal rate of \$1.00/year.
Clementina Street*	• The San Francisco Department of Public Works ("SFPW") is under contract with OCII to design Clementina Street to City standards as a public right of way in conjunction with the design of the Block 3 Park • Design will accommodate one-way vehicular traffic, sidewalks, and potential passenger loading • The selected Applicant will be expected to coordinate with SFPW on design and construction • OCII may request that the Applicant construct and be reimbursed for the Clementina Street improvements, if necessary to ensure street access in time for initial occupancy of the Project

	• It is anticipated that Clementina Street will be transferred to and accepted by the City for ongoing ownership and maintenance
Folsom Street*	• Envisioned as a neighborhood “main street” lined with mixed-use buildings containing active ground floor uses, serving the Transbay and Rincon Hill neighborhoods (see DCDG) • Design and build the 25’ sidewalk in accordance with the Folsom Street Improvement Plans (paving bands, double row of trees, vertical art elements, seating, etc.)
Beale Street	• For proposal purposes, assume that pedestrian improvements on this frontage will extend 23’ from the lot line to the edge of the curb. The area within the 23’ should include a 15’ sidewalk (adjacent to the lot line) and an 8’ landscape area that includes a single row of trees, street furniture and lighting, and any other proposed features to activate this public space. • Note that these dimensions are subject to change and may fluctuate as plans for the street and streetscape are finalized and reviewed by relevant city agencies.
Main Street*	• Design and build a 30’ sidewalk to serve as a linear park, creating a welcoming streetscape that connects pedestrians from active retail frontages on Folsom Street to the planned Block 3 Park • Include landscaping, lighting, and furnishings
Parking (Vehicle and Bicycle)	• For proposal purposes and given the exceptional access to transit, assume that no residential parking will be provided • Early in predevelopment, Applicants should study the costs and benefits of a full or partial underground level to house building services and utilities, bicycle parking, and potentially some underground parking spaces for staff, care providers, and, if space allows, some resident parking spaces. • Class I bicycle parking spaces at a 1:1 ratio for family units (consider a design that also accommodates stroller parking) and approximately 1:5 for senior units (Applicants may choose to adjust this suggested ratio for senior units if accompanied by an explanation based on operational experience)

** Refer to the Streetscape and Open Space Concept Plan for detailed design direction (subject to change) including pedestrian access, streetscape furnishings, sustainable landscape elements, planting, and lighting.*

Applicants should determine and describe the optimal construction type for the Site to meet the programming, design, and cost containment requirements of this RFP. To the extent possible, unit sizes and layouts should be consistent and stacked. The narrative should describe efficiencies contemplated in the proposed design.

The selected Applicant must possess the qualifications and experience to implement a financially sound development plan to construct and operate the housing and achieve a high quality design with amenities that enhance unit livability.

Please refer to Section IV.F and G below for zoning and land use restrictions. OCII reserves the right to select an Applicant and require significant redesign. OCII further reserves the right to change the scope of the development program and/or require changes to the building design and unit configuration as it deems appropriate.

In furtherance of long-standing City objectives to increase affordable housing, OCII may consider rezoning Block 2 to increase the height on one or more portions of the Site, subject to further studies, following Applicant selection. Applicants should address potential unit count increases and other changes resulting from a height increase only in the narrative described in Section VI.B. All other aspects of the proposal should assume a project that conforms to the existing development controls and program as described herein. OCII will provide Applicants with additional information as it becomes available.

1. **Target Populations**

As previously noted, Transbay 2 will provide affordable housing serving low-income households in separate facilities for a Family Project and a Senior Project. In both the Family Project and Senior Project, assume that 20% of units will be set aside for formerly homeless households (exact number of units/percentages subject to review by OCII and HSH). Housing COP holders is of the highest priority in both the Family and Senior Projects. Additional information regarding preferences for resident selection (for all but the homeless units) is described in Section IV.E below.

Low-Income Families

Units in the Family Project should be designed to accommodate persons of all ages in a wide variety of household configurations. Units and amenities should incorporate best practices in urban multi-family housing and designs should incorporate feedback from experienced project managers and operations staff.

Low-Income Seniors

According to San Francisco's 2014 Housing Element, the City's older residents, those 60 years and older, will grow more than any other age segment over the coming years, accounting for approximately 33% of the San Francisco population by 2040 (seniors were 19% of the population in 2010, according to the U.S. Census). The City and County's 2105-2019 Consolidated Plan further notes that the "baby boomer" population in San Francisco is comprised largely of renters. As residents of this generation reach retirement age, their incomes will decline and the need for low-cost affordable senior housing will rise. In addition to housing, many seniors are in need of transportation to medical appointments and grocery shopping, income-supportive services, and recreational programs.

Senior housing units should emphasize accessibility, assuming that a large portion of residents will have a mobility impairment and many may have vision or hearing impairments. Design and programming of the services and community spaces are integral to the success of the Project and should be inviting and offer a variety of well-placed public and private spaces to ensure residents' comfort seeking assistance and facilitate opportunities for community building.

Formerly Homeless Seniors and Families

Approximately 20% of both family and senior units will be set-aside for formerly homeless individuals/households. These units are essential in addressing the City's homelessness crisis. The need for permanent supportive housing units is described in HSH's Five Year Strategic Framework (2017), the City's 2014 Housing Element of the General Plan, and MOHCD's 2015-2019 Consolidated Plan.

Applicants for these units will be referred to the Project by HSH through the Coordinated Entry process. The Coordinated Entry process serves as a standardized screening, intake, and assessment tool that is used to determine the specific needs of homeless persons and their eligibility for available programs and interventions. It is intended to serve as a referral resource to match households to the most appropriate resources. Applicants should assume that referred prospective tenants will be in need of intensive support as further described in Section IV.F below. All referred applicants will be persons or households experiencing homelessness in San Francisco.

Supportive housing unit tenants will contribute 30% of their income toward rent. The difference the tenant contribution and the cost to operate the unit will be covered by the City's Local Operating Subsidy Program ("LOSP"). Applicants should refer to the San Francisco LOSP Policies and Procedures Manual for additional information.

B. Land Use Restrictions

The land use controls of the Transbay Redevelopment Plan apply to Block 2, and its development is subject to the review and approval of OCII. The Redevelopment Plan, Design for Development, and DCDG for the Transbay Redevelopment Project are available on OCII's website at <http://sfocii.org/transbay>. Because the Project is located within a redevelopment area, these Transbay redevelopment documents replace the City's zoning regulations.

The requirements include, but are not limited to, the following categories: height/bulk, open space, parking, off-street loading, bicycle parking, setbacks, signage, and utilities. Applicants are responsible for ensuring that their proposal complies with all applicable development requirements.

As previously noted, OCII may consider rezoning Block 2 to increase the height on one or more portions of the Site. Any change to the development controls is subject to further studies, community outreach, environmental review, and consideration and approval by the OCII Commission. If a change requires a Redevelopment Plan amendment, the change would require approval from the OCII Commission and the San Francisco Board of Supervisors. Applicants should address their approach in addressing the myriad of issues associated with zoning changes and similar actions in their submittal (see Section VI.B).

C. Design & Construction

OCII requires excellence in architectural design and physical acknowledgement, through the highest design and construction standards, of the Site's prominent location in a high-density, newly developing, master-planned, residential neighborhood. In addition to offering highly functional residential spaces, the Project's design must serve to frame the future Block 3 Park, connect the emerging Folsom Street retail corridor with a thoughtful ground floor design, and feature a contextual design that responds to the surrounding architecture.

The Design for Development allows for the maximum amount of creativity from the Applicant by identifying basic standards and guidelines, such as height and bulk, but otherwise depending primarily on design guidelines to direct the rest of the building design. Please refer to the DCDG and Design for Development comprehensive design standards and guidelines.

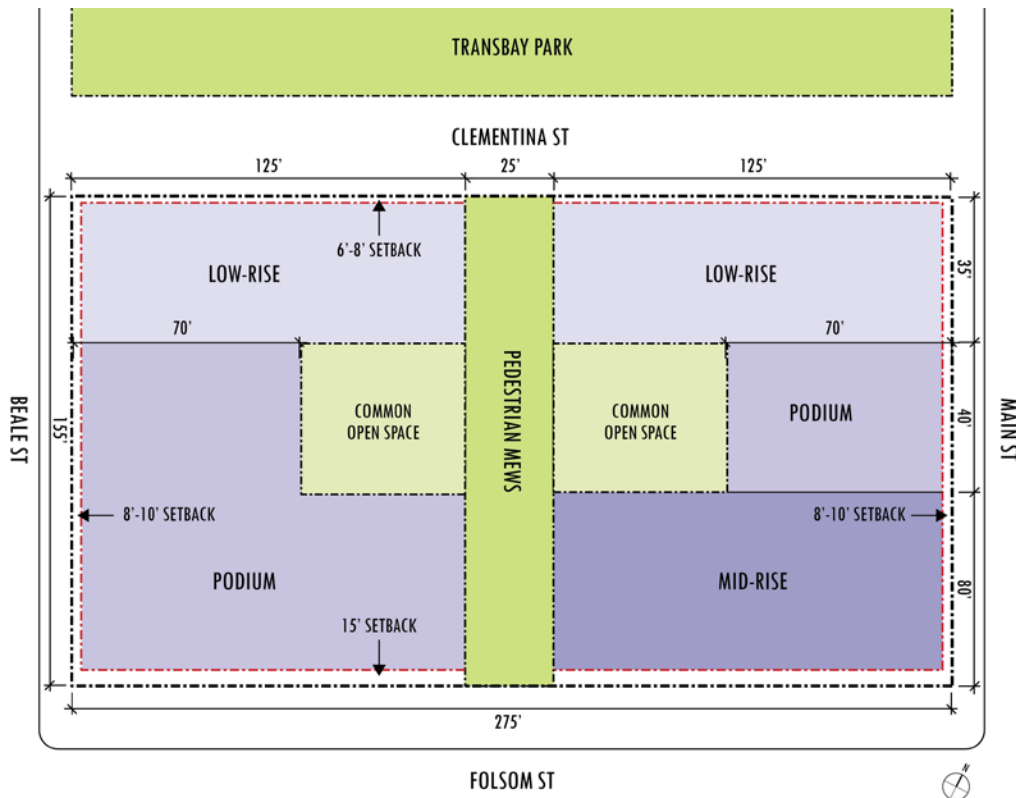
In addition to the standards and guidelines set forth in the Transbay Project Area documents, residential units should be designed to meet the needs of the target population as described above.

Building Envelope and Design	OCII Requirements
Building Heights*	Refer to DCDG Map 5 for the building height plan • Townhouse (along Clementina): minimum 35', maximum 50' (maximum of 4 floors) • Podium: minimum 50', maximum 85' (maximum of 8 floors) • Mid-rise: minimum 65', maximum 165'
Setbacks	Refer to DCDG Map 4 for the setback plan • Folsom Street: 15' setback area should be used as public space but will remain part of the private development parcel • Clementina Street: 6' to 8' townhouse setback • Main Street and Beale Street: 8' to 10' townhouse setback (beginning 40' to 60' from the Folsom Street corner) Note that the DCDG requires ground-floor residential units on the indicated townhouse setback portions of Main and Beale Streets. While the original intent was to locate ground-floor residential units on portions of Main and Beale Streets to enhance the linear park concept, adjacent blocks have developed at a higher density than originally anticipated. There is now precedent for locating more active ground-floor uses such as retail or community amenity spaces at those locations. OCII would consider supporting a variance from the residential requirement along Main and Beale Streets, as well as a change to the minimum setback requirement, if the project design demonstrates high-quality pedestrian realm design and consistency with the urban form of the surrounding neighborhood.
Lot Coverage/ Floorplate Dimensions	For buildings 85' to 250' height, bulk controls apply: • Maximum floorplate: 7,500 square feet

	• Maximum plan dimension: 100' • Maximum floorplate aspect ratio: 1:1.6
Street Wall	• All buildings should define a consistent street wall framing public streets • Buildings with façade lengths greater than 100 feet along a side must use modulation and façade articulation to create a finer grained street wall
Pedestrian Access	• Primary building entrances and lobbies may be located on Folsom Street, Main Street or Beale Street. Lobbies should be prominent, inviting, and provide visual interest. • Entrances to ground-floor retail or other active uses are highly encouraged to be located along the mews. • Along all townhouse setback frontages, buildings are to be designed with individually accessible residential units. See notes above in Setbacks and below in Townhome Design.
Private Common Open Space	• Ground-level central courtyard, designed to be accessible from or encompass part of the pedestrian mews and enhance the public realm; note that a portion of the interior courtyard should serve as outdoor space for the child care facility • 16 square feet of open space per residential unit (this is in addition to the ground-level courtyards); can be met through any combination of shared rooftop gardens, podium level decks, solariums, or other landscaped areas. • Open space areas must meet the dimensional requirements of the DCDG. • Design should attempt to maximize sunlight exposure to open spaces, particularly seating areas or other passive recreation spaces.
Townhome Design	• Maximum width of 30 feet per unit • First floor of townhouse units must be elevated between 2 and 5 feet above street grade, an elevation of 4 to 5 feet is preferred • Townhome-style flats are preferable to townhome units with internal stairs • Refer to the DCDG for additional design specifications
Code Compliance and Green Building	• Compliance with San Francisco Building Code and Administrative Bulletin AB-093 • Compliance with San Francisco Planning Department Standards for Bird-Safe Buildings adopted July 14, 2011 • LEED "Gold" rating or Green Point Rating of 125 or higher • Explore block-scale eco-district solutions in collaboration with development on Transbay Blocks 3 and 4
Utilities & Building Services	• All garbage and recycling facilities must be located fully within each building, must not be accessed from the Folsom Street frontage, and must meet Recology pick-up requirements • Minimize blank walls and utility frontages
Vehicular Access & Loading	• No curb cuts are permitted on Folsom Street and should be avoided on Beale Street, if possible, due to the anticipated cycle track • No off-street loading facilities are required for residential development of less than 100,000 square feet; one space is requirement for 100,001 to 200,000 square feet; two spaces for 200,001 to 500,000 square feet • Shared loading facilities between the buildings on 2 East and 2 West may be considered

** OCII may consider increases to the maximum heights of the mid-rise parcel on 2 East or the podium parcel on 2 West, or both. Applicants should address this in a narrative as described in Section VI.B only. All other aspects of the proposal should assume a project that complies with existing height limits.*

Following is a map illustrating site dimensions and design parameters:



1. Surrounding Uses

Design should pay particular attention to the existing built environment. The Site is/will be surrounded by a mix of uses, including:

- Block 3 Park (to the north) – OCII, in collaboration with SFPW, initiated public outreach on the project in early 2020. The park encompasses approximately one acre and is envisioned to include a plaza, a children's play element, and green spaces to serve persons of all ages.
- 201 Folsom Street "Lumina" (to the south) – A condominium complex with approximately 650 units in two towers and two mid-rise structures. Woodlands Market, a high-end grocery store, is located at the ground floor of the mid-rise building at Main Street and Folsom Street.
- 160 Folsom Street (Block 1, to the east) – Block 1 is under construction with an estimated completion date in spring 2020. The site will feature 392 condominium units, 156 of which will be below market rate, in a 400' high rise (on eastern side of the block), a mid-rise podium (on the western side of the site), and townhomes (on the northern side of the site, fronting on Clementina Street).
- 280 Beale Street/299 Fremont Street "Solaire" (Block 6, to the west) – Block 6 was completed in 2016 and features 479 units of rental housing, including 409 market rate units in a tower (on the western side of the site) 70 below market rate units in a mid-rise podium and townhomes (on the eastern portion of the site). Block 6 features ground floor retail along Folsom Street, including a Phil's Coffee at the corner of Folsom Street and Beale Street.

2. Green Design Guidelines

Improvements must meet San Francisco Building Code and Administrative Bulletin AB-093 and constructed to a Green Point Rated standard of 125 or LEED Gold rating. In addition, OCII seeks to maximize the overall sustainability of the Project to the extent possible through the integrated use of “green” building elements. Building features considered green or sustainable may include natural ventilation, daylighting, water conservation, and use of resource efficient and healthy building materials.

3. Priority Permit Processing

Pursuant to San Francisco Department of Building Inspection (“DBI”) policy, this project qualifies as a designated priority permit because all of the units are affordable. The Applicant should become familiar with the priority permit procedures to ensure that DBI permits are reviewed expeditiously.

D. Affordability Restrictions & Financing Plan

All proposed financing will be subject to underwriting using the most current version of OCII/MOHCD Underwriting Guidelines and MOHCD policies. Applicants should use these guidelines and policies, which can be found online at the links below, in preparing their financing plans. Lists of documents are on the MOHCD website at <http://sfmohcd.org/documents-reports-and-forms> and <http://sfmohcd.org/asset-management-multifamily-rental-housing>.

Policy Document	File Location
Underwriting Guidelines	http://sfmohcd.org/sites/default/files/Documents/CURRENT%20Underwriting%20Guidelines%202016.pdf
Residual Receipts	http://sfmohcd.org/sites/default/files/Documents/MOH/CCSF_ResidualRecPolicy_2016revision_FINAL040116.pdf
Operating Fees	http://sfmohcd.org/sites/default/files/Documents/CURRENT%20OperatingFeesPolicy%202016.pdf
Ground Lease	http://sfmohcd.org/sites/default/files/FileCenter/Documents/9147-CURRENT%20Ground%20Lease%20Policy.pdf
Loan Agreement	http://sfmohcd.org/sites/default/files/FileCenter/Documents/9149-CURRENT%20Loan%20Agreement%20Policy.pdf
Tax Credit Developer Fee	http://sfmohcd.org/sites/default/files/Documents/CURRENT%20Developer%20Fee%20Policy%20072916.pdf
Architecture & Engineering Fees	http://sfmohcd.org/sites/default/files/FileCenter/Documents/2495-MOHCD%20-%20AE%20fee%20guidelines%20-%20Basic%20Services%20-%20All%20Projects.pdf
Commercial Underwriting Guidelines	http://sfmohcd.org/sites/default/files/Documents/MOH/MOHCD%20Commercial%20Underwriting%20Guidelines%20FINAL%20approved%20by%20LC%20020218.pdf
LOSP Policies & Procedures Manual	http://sfmohcd.org/sites/default/files/Documents/MOH/Asset%20Management/LOSP%20Policies%20Procedures%20Manual.pdf

OCII’s goal is that 2 East and 2 West remain permanently affordable and thus affordability covenants and restrictions will generally not be subordinated. To ensure this outcome, OCII will transfer Site control to the selected Developers through long-term ground or air rights leases (with initial terms of 55-75 years). Following conversion to permanent financing, OCII will transfer its interests to MOHCD as the Housing Successor. The development program for the Site is in furtherance of the goals described in MOHCD’s Consolidated Plan (2015-2020).

Applicants should submit, as further described in Section VI.A, a financial plan that demonstrates feasibility for both the Senior and Family Projects. Limited OCII resources may be available to assist in the development of the Projects; however, the Applicant will be expected to aggressively pursue non-OCII sources of development financing. Submittals will be evaluated, in part, based on the level of OCII subsidy required and the extent to which these funds are leveraged to obtain non-OCII sources. Applicants must account for all costs of development, including supplementary environmental remediation, if any; streetscape improvements, sidewalks, utility connections, and site work; demolition, grading and shoring; and all permitting and applicable City or other fees. To provide this information, Applicants must complete the OCII/MOHCD Sources and Uses Budget and include the following:

- **Primary capital funding sources.** Sources should consist of currently available sources, including but not limited to:
 - Low income housing tax credits with tax-exempt bonds (9% credits from the regional pool will NOT be available to this project);
 - Federal Home Loan Bank Affordable Housing Program funds;
 - California Department of Housing and Community Development (“HCD”) Multifamily Housing Program, Affordable Housing and Sustainable Communities, Infill Infrastructure Grant, or other HCD funding that may become available;
 - OCII subsidies; and
 - Any other funding that Applicants deem appropriate and feasible.

Applicants should include an explanation of why the projects would be competitive for the various funding sources assumed and, if any sources were not assumed, why they were deemed inappropriate for the project in the financing narrative. The narrative should also describe assumptions such as tax credit pricing, state and federal credits, and amount of subsidy requested should be included for each funding source.

- **Rents.** OCII agreements will require that rents be set at an amount that is affordable to households earning up to 80% of unadjusted AMI for the U.S. Department of Housing and Urban Development (HUD) Metro Fair Market Area containing San Francisco as established annually by MOHCD, with an average rent/AMI at or below 60% (pursuant to CTCAC income averaging regulations and MOHCD Underwriting Guidelines dated June 17, 2019). OCII encourages Applicants to describe anticipated market needs and propose an appropriate range of rent levels, specific to the Senior Project and Family Project. Restrictions based on the requirements of other Project funders may be allowed, however those restrictions may not be lower than 25% AMI and must include some units at 30% AMI.
- **LOSP.** Applicants should assume that the units set aside for formerly homeless seniors and families will receive funding support from LOSP, through 15-year contracts with MOHCD. Assume that tenants in these units will contribute \$300 per month for rent and that the difference between the tenant contribution and unit operating cost will be covered by LOSP. This assumption is for purposes of financial modeling only and is subject to revision after an Applicant has been selected. Note that debt service cannot be paid for by LOSP, except for minimal mandatory annual interest payments for below market rate state financing covered by the Uniform Multifamily Regulations (such as MHP and AHSC). LOSP will cover required fees such as partnership and asset management fees and the limited partnership asset management fee, pursuant to MOHCD’s Operating Fees Policy. Note that while this proposal should assume LOSP funding, Applicants may be required to apply for subsidies through the Continuum of Care to support these units in one or both projects.
- **Operating budgets.** Provide separate operating budgets for the Senior and Family Projects that include all expenses necessary to properly operate and maintain the buildings, including front desk coverage and resident coordinators, but that exclude support services (i.e. case management). Note that the operating budgets should include costs associated with the ongoing maintenance of the pedestrian mews and streetscape areas. Applicants may choose to split these costs between the Senior and Family Projects or assign them only to one Project.
- **Services budgets.** Provide separate services budgets for the Senior and Family Projects that include services staffing information (number of staff full-time equivalents (“FTEs”), type of services staff, roles of services staff) and identify potential services funding sources. Please see Section IV.D, below, for further information regarding required resident services. While services funding from HSH will be made available for these Projects, as noted below, Applicants are encouraged to leverage local services funding with other services funding sources.

- **HSH services support.** Applicants should assume for proposal purposes that HSH will provide \$6,477 per year per unit for family units and \$5,656 per year per unit for senior supportive units (HSH funding estimates are based on fiscal year 2021-2022 rate). Assume case management at a ratio of one FTE for every 25 residents for senior units and a ratio of one FTE for every 20 households for family units.
- **Construction.** Applicants must describe the anticipated construction type and provide detailed construction cost estimates. Applicants should assume a construction commencement date of December 2021 and should identify escalation assumptions consistent with this timeframe.
- **Streetscape maintenance.** The sidewalks on Clementina Street, Beale Street, and Main Street will be maintained by the Community Business District (“CBD”) for an initial period of 15 years which began on January 1, 2016. The CBD will maintain landscaping, sweep and wash sidewalks, and clean street furniture. After the initial 15-year period, this may be extended or this responsibility may transfer to the SFPW or to the affordable housing project owner(s).

Folsom Street sidewalk improvements will also be maintained by the CBD for an initial 15-year period (began on January 1, 2016). After the initial 15-year period, maintenance by the CBD may be continued. If the CBD is not continued, the Folsom Street right of way will be maintained by SFPW. Folsom Street maintenance will not transfer to the affordable project owner(s).

- **Ground lease rents.** The selected Developers will enter into 55-75 year initial term ground or air rights lease agreements for the Senior and Family Projects (with options to extend to a total of 99 years) with OCII. The annual rent will be set at 10% of the appraised unrestricted value of each site. The rent will be re-determined every 15 years thereafter, as determined by an MAI appraiser selected by and at the sole cost of tenant. For purposes of this proposal, Applicants should assume that annual rent will be comprised of a \$15,000 annual base rent to be paid as an operating expense (assume a separate rent of \$15,000 per year each for both projects). Applicants should note that annual rent must be considered an “above the line” expense for each project. Residual receipts payable to OCII/MOHCD will not be applied to ground lease rents. Any residual receipts flowing to OCII/MOHCD will be applied toward payment of the loan agreement.
- **Non-residential costs and income.** Applicants should refer to the MOHCD Commercial Space Underwriting Guidelines for policies regarding expenses and income for the development and operation of the child care and retail spaces. A separate pro-forma showing income, expenses and cash flow for these spaces should be included in the submittal.
 - o **Child care space.** The commercial pro-forma should show the cost of constructing the child care space to cold shell condition. Applicants should follow the guidelines applicable to a Public Benefit Use described in the MOHCD Commercial Space Underwriting Guidelines. As allowed under these guidelines, OCII may later require that the child care space be improved to warm shell condition, depending on the funds available for tenant improvements. For proposal purposes, assume a nominal lease income of \$1.00 per year. Lease terms will be negotiated with the selected Developers.
 - o **Retail.** The commercial pro-forma should show the cost of constructing the retail cold shell. Applicants should follow the guidelines applicable to a Commercial Use described in the MOHCD Commercial Underwriting Guidelines. Applicants should review market rate rents and include appropriate rental income and related vacancy allowances in the operating budget.

E. Occupancy Preferences & Resident Selection

Preference for occupancy of senior and family units shall be given first to Certificate of Preference Holders (defined as persons displaced from their homes by the former Redevelopment Agency) and the selected Developers should seek financing that is compatible with this preference. OCII will apply housing preferences authorized under Chapter 47 of the San Francisco Administrative Code to the extent that they are consistent with other applicable laws and policies. Preference for the senior and family units will be given in the following order:

1. Certificate of Preference Holders (Property Owner and Occupant Preference Program, as amended and restated in SFRA Resolution No. 57-2008)
2. Displaced Tenants Housing Preference
3. Neighborhood Resident Housing Preference
4. San Francisco residents or workers
5. Members of the general public

The Developer will establish separate tenant selection policies for the senior and family projects. The policy for the senior project will define age eligibility, consistent with federal and state law. Tenants for both Projects must meet the income eligibility criteria and the Developers' established screening requirements for the Projects, which must be consistent with OCII's marketing policies. Any authorized preference shall be permitted only to the extent that such preference does not have the purpose or effect of delaying or otherwise denying access to a housing development or unit on account of any basis listed in Subsection (a) or (d) of Section 12955 of the California Government Code. OCII will work with the selected Developers to resolve any potential occupancy conflicts and determine additional occupancy preferences and marketing requirements to ensure adherence to OCII occupancy preferences and marketing requirements. If more applicants apply than the number of units available for one or both Projects, the Developers shall conduct a public lottery or lotteries.

As previously noted, staff from HSH will provide tenant referrals for the units set-aside for formerly homeless seniors and families through the Coordinated Entry process. Pursuant to HSH and LOSEP policies, tenants in these units must be extremely low-income and experiencing homelessness in San Francisco.

1. **Advertising and Marketing**

Starting one month after construction commencement, the selected Developers must provide early rental readiness services including education, individualized support, group workshops, and peer counseling, with an emphasis on outreach to and technical assistance for Certificate of Preference holders. The Developers **must select a third party provider or providers for these services and execute a memorandum of understanding (or similar document)**. A pre-approved provider list will be provided to the selected developer in the Early Outreach Plan template (OCII will provide this template to Applicants upon request).

After the early outreach period, the Developers will be expected to prepare and implement robust marketing plans for each Project that successfully outreach to low income seniors and families. The Developers must provide notice of the rental opportunities through public meetings and mailings. The Developers must make support service staff available to prospective applicants, as they may require, for the purpose of assisting them throughout the applicant process and maximizing their participation.

Beginning in predevelopment, through construction and initial lease-up, and on an ongoing basis, OCII and MOHCD will require compliance with OCII, MOHCD, and HSH standards and protocols and regular communication and collaboration with staff from these agencies. Requirements will include early outreach planning and implementation, marketing planning and implementation, public lotteries for initial lease-up, appeals processing, lease-up, and ongoing wait list management.

F. Resident Services

The successful provision of resident support services is critical to the overall success of the development program for both the Senior and Family Projects. The submittal should address (in Section VI.G) a clear services plan for all target resident populations, describe the approach and the organizational capacity of the services provider, and describe any commitments from prospective providers or funders.

Formerly homeless residents will require intensive support services and case management. Both the Family and Senior Projects should include appropriate services coordination and connections for resident households. Services should be designed to serve the anticipated resident populations.

1. **Minimum Requirements**

- An understanding of the housing and service needs of the tenant populations
- A clear program design that incorporates: tenant-based services, access to and coordination of mainstream community services, and subcontracted and/or partner services.
- An understanding of employment issues as they relate to homeless populations and a clear program design that incorporates direct services as well as access to and coordination with community based subcontracted and/or partner services.
- Experience providing required services in a housing setting.
- A commitment by the services provider(s) to coordinate with the property management through regularly scheduled tenant meetings to ensure sound operational and building management practices.

2. **Organizational Capacity**

- A track record or other demonstration of effective collaboration that illustrates the ability of the organization to effectively coordinate and deliver services and other resources needed by families and seniors being served within a housing program.
- Commitment(s) from housing and/or service providers and additional funders (public or private), describing in-kind, leveraged, or matching funds for proposed services that will complement the applicant's contribution and a plan for securing additional resources over time.
- Demonstrate project readiness by providing a descriptive narrative and budget.

3. **Supportive Service Model**

Resident services should be tailored to specific resident needs in both the Family Project and Senior Project. Applicants should outline a resident services program that anticipates potential needs and describes staffing.

For the formerly homeless residents, the service models should focus on permanent supportive housing with intensive wrap-around services. The service provider(s) must demonstrate their familiarity with the core principles of the trauma informed system (TIS). Providers should use a tenant-centered model that provides, or facilitates in the provision of, an array of non-mandatory voluntary services that encourages tenants to utilize them. In addition to case management serves, other supportive services identified to be necessary for housing stability should be available. TIS should be included at all levels of housing management, and specific comments included in the services and resident selection plans.

Service activities (both senior and family projects):

- TIS that includes initial and ongoing training for both services and property management staff/teams.
- Develop knowledge, skills, and ability to engage and assess formerly homeless families and seniors in collaboration with property management during the resident selection period. Ongoing outreach and engagement to the tenant populations
- Mental health and substance use management and recovery
- Eviction prevention counseling and advocacy and early intervention or problem solving on issues that may affect housing stability
- Advocacy or assistance in solving legal or financial problems
- Coordination of tenant involvement with property management

- Access to basic needs such as clothing and food
- Conflict resolution among tenants using trauma informed principles
- Recreation, community building, social, and/or other group programming
- Adult learning, particularly opportunities for adults who may need literacy support
- Access to benefits and educational opportunities as appropriate
- Opportunities to move up the housing ladder via the Moving On Initiative or other programs

For the family project, activities should be coordinated on site for school age children. These may include after school homework and/or tutoring help, arts and crafts, and other enrichment activities. Children's service programming should also take into consideration the special needs of formerly homeless children and be prepared to address cases of emotional and behavioral issues. Service activities (specific to the family project):

- Referral to or provision of supported pre-vocational/vocational activities appropriate for the skill level of residents
- Adult education, employment skill development, and job placement and retention services
- Parenting support and life skills coaching using trauma informed parenting providers
- Child and youth services including academic support, after school enrichment, recreation, youth development, and counseling

For the senior project, services should emphasize access to aid programs and benefits, physical and mental well-being, and community building. Service activities (specific to the senior project):

- Referrals and assistance with accessing primary medical care and other community services as needed
- Access to in-home care services

G. Property Management/Maintenance Oversight

Applicants may choose to manage the Family and Senior Projects by the same property manager or propose a different property manager for each project. If the same property management entity is selected, the Applicant should ensure that the properties are separately staffed and operated to ensure fair housing compliance and a management approach that is specific to the resident population to be served. The selected property management company or companies must have demonstrated successful approaches to managing buildings targeted for each proposed tenant population, including family housing, senior housing, and integrated housing that serves formerly homeless persons. Applicants should provide a narrative description of the property manager's specific experience working with these populations. This narrative description should include the property management company's experience with and approach to working with on-site and community service providers to ensure resident safety and stability.

The property manager(s) should exhibit a commitment to provide sound operational and building management staff who is willing to meet with residents, the Developers, and the services provider(s) at regular meetings. Applicants must also show that the property management company is experienced in assisting new developments to become integrated into the neighborhood by cultivating good relationships with neighborhood residents, businesses, and other stakeholders. Applicants should provide information regarding the property management company's approach to building security and maintenance. Applicants should assume that the property manager(s) will provide 24-hour desk coverage.

H. Equal Opportunity Programs

OCII has an Equal Opportunity Program (“EOP”) that requires that OCII-sponsored projects provide benefits to economically disadvantaged communities and local residents. The EOP consists of the policies and programs that are described in Attachments 11 through 17 of this RFP.

As part of the RFP response, the Applicant shall submit a Workforce and Contracting Action Plan (“WCAP”) that addresses how the team will implement the following policies and programs: Nondiscrimination in Contracts and Benefits, Small Business Enterprise Policy, Minimum Compensation Policy, Health Care Accountability Policy (“HCAP”), Prevailing Wage, Permanent Workforce, and Construction Workforce. The WCAP should identify the person responsible for its implementation. This individual may be an in-house staff member or outside consultant. In addition, the WCAP should briefly describe how an SBE associate architect and general contractor joint venture (described below) could potentially be utilized in this project.

As previously noted, an Applicant is defined as a team comprised of only the following: (1) a for profit or non-profit Housing Developer and non-profit co-developer (2) property manager, (3) a lead architect, (4) a WCAP consultant (if an outside consultant is being proposed), and (5) a qualified services provider. Any and all other consultant(s) to the development team shall be brought on to the project at a subsequent stage pursuant to OCII’s SBE Policy.

OCII strongly encourages the Applicant (and those consultants and contractors, including the general contractor, that the Applicant will bring on to the project after Applicant selection) to create joint ventures or similar partnership relationships with San Francisco-based SBEs looking to build capacity and gain experience.

1. SBE Associate Architect

OCII requires that the successful Applicant cooperate with OCII to identify substantive design elements of the Projects, to the extent practicable and economically feasible, to be offered to an SBE associate architect and competitively solicit an SBE associate architect pursuant to OCII’s SBE Policy even if the Applicant’s lead architect is an SBE. It is expected that the role of the associate architect should be meaningful and collaborative, such as providing the associate architect a discreet massing component and involving the associate architect in design through the completion of the Project. OCII expects that the associate architect scope will comprise at least 35% of the total design contract. To allow for collaboration from concept through construction, OCII emphasizes that massing concepts presented in response to this RFP should be not include architectural designs and should be further developed only after the selection of an SBE associate architect.

2. General Contractor Joint Venture

OCII requires that the successful Applicant cooperate with OCII and competitively solicit a general contractor with the intent of creating a joint venture or similar partnership opportunity, to the extent practicable and economically feasible, between a general contractor and an OCII-recognized SBE contractor. Furthermore, the successful Applicant shall cooperate and require the general contractor to exercise good faith efforts to select subcontractors who either are SBEs or, if they are not SBEs, are willing to create joint ventures or similar partnership opportunities with SBEs.

I. Community Outreach

It is critical to the success of the development program that the selected Developers establish positive links with the Transbay community throughout the development process. A Transbay CAC member will review proposal submittals and participate in the Evaluation Panel. The Transbay CAC will review and confirm the proposal recommended by the Evaluation Panel and OCII Executive Director, prior to review by the OCII Commission. In addition, the Transbay CAC will be asked to make a recommendation regarding schematic design concerning the Site and any OCII financing approvals for the Project. The selected Developers are expected to maintain an ongoing relationship with the Transbay CAC during development and once the Projects are operational.

SECTION V. SELECTION PROCESS & CRITERIA

A. Selection Process

1. Submittals will be accepted only until the dates and times shown in Section II.A and E.
2. Submittals will initially be electronic, uploaded to OneDrive pursuant to instructions emailed to registered Applicants. Electronic submittals must be followed by one (1) original and four (4) hard copies to be considered. No submissions received by facsimile or electronic mail will be considered. The Applicant is solely responsible for ensuring that all information requested in Section VI Submission Requirements is submitted.
3. OCII staff will contact references.
4. Applicants who have provided submittals that meet the requirements of this RFP will be interviewed. Interviews are scheduled to be held on the date(s) shown in Section II.A. These dates are subject to change. All Applicants should advise OCII staff of availability on these days. Interviews will be held at OCII, located at One South Van Ness Avenue in San Francisco on the fifth floor (note that in the event necessary due to COVID-19, interviews may be conducted via video call).
5. Further information or written material regarding qualifications or submittals may be requested prior to or following interviews.
6. OCII staff will make a recommendation to the OCII Commission based on the input of the Evaluation Panel review of the submittals, interviews, and reference checks.
7. The OCII Commission will approve selection of the successful Applicant.

B. Selection Criteria

The selection of the Applicant will be based on the strength of the proposed development concept and the alternative development approach narrative, as well as the Applicant team members' experience as described below.

Maximum Points	Criteria
50	Proposed Development Concept
20	Proposed Massing Concept: architectural concept and vision, strength, financial viability, and constructability of proposed massing concept, number of units, conformance with the Redevelopment Plan and Transbay design standards; and, alternative development approach narrative
15	Financial feasibility and level of OCII subsidy
10	Proposed Services Plan
5	Proposed Marketing Plan
50	Developer Team Experience and Capacity
10	Developers' experience in developing and marketing affordable housing and mixed-use projects <u>comparable</u> to the housing proposed in this RFP and in compliance with OCII/MOHCDC marketing and tenant selection standards
10	Developers' experience with government assisted affordable housing programs and financing sources and/or "green" housing; Developers workload capacity; Developers' experience delivering high quality affordable housing on a budget (defined as

	maintaining or reducing a project's per unit cost between approval of a predevelopment loan/schematic design approval and construction loan closing)
10	Workforce and Contracting Action Plan
10	Architect experience and capacity, including "green" housing; Architect experience delivering affordable housing in an excellent design on a budget (defined as maintaining or reducing a project's per unit cost between approval of a predevelopment loan/schematic design approval and construction loan closing)
5	Services provider experience and capacity
5	Property manager experience and capacity
100	Maximum Total Points

Ranking will also be based on staff experience and capacity in light of current and projected future workloads; success of its submittal in the Evaluation Panel interview; and ability to comply with OCII policies and requirements.

SECTION VI. SUBMISSION REQUIREMENTS

The Applicant must submit electronically, based on the instructions emailed to registered Applicants. The electronic submittal must be followed by a hard copy submittal, **including** one original, plus four (4) copies of the submittal containing the information requested in this RFP.

Applicants are to provide the requested information in the order indicated below. For electronic submittals, each section A-G must be a separate PDF file, with the file name labeled according to the Section names below. Note, however, that the pro formas should be uploaded as excel files. For hard copy submittals, include a table of contents, with sections separated by labeled tabs corresponding to sections A-G below and their sub-sections.

Electronic and hard copy submittals must be submitted to OCII, on or before the time, date and at the place shown above in Section II. E. Hand delivery is advised for hard copy submittals. Late, incomplete, emailed, or faxed submittals will **not** be considered.

A. Development Concept & Financing Proposal

Using standard estimating techniques and clearly describing key assumptions, provide the following documents:

1. **Project Description (Narrative)**: Submit a narrative of no more than four (4) pages describing the proposed project. The narrative should clearly describe the Applicants approach to designating the Family Project and Senior Project and incorporating other required spaces to optimize livability, design, and financial feasibility for all project components.
2. **Financing Plan (Narrative)**: Submit a plan of no more than three (3) pages that clearly describes the anticipated costs and financing for the Project that is consistent with the Development Program as described in Section IV.
3. **Sources and Uses Pro-Formas (Attachment #19)**: Fill out the OCII/MOHCD construction and permanent sources and uses pro forma. Please prepare separate pro formas for the Senior and Family Projects. Please contact the RFP representative if these spreadsheets need to be modified. In addition, please provide detailed construction estimates as described in Section IV.C and IV.D.
4. **Cash Flow (Attachment #19)**: Submit separate 20-year cash flow projections for the Senior and Family Projects using the template provided.
5. **Commercial Plan (Narrative)**: Submit a narrative of no more than two (2) pages that describes the Applicant's approach to providing functional, marketable space for neighborhood serving retail uses.

Describe the proposed marketing efforts and target tenants, including collaboration with OEWD and/or community based organizations to identify small businesses that may benefit from access to retail space and who may, in turn, provide goods and services that would benefit neighborhood residents. Describe capacity and experience successfully working with such small businesses; such experience may include micro/small local food-related businesses and programs that support them. Describe planned efforts to assist prospective tenants in connecting with programs that may provide tenant improvement financing or other support. In addition, describe the Applicant's approach to selecting a child care operator and coordinating with that operator on design, construction, and ongoing operation.

6. **Commercial Pro Forma:** Submit a separate commercial income, expense, and cash flow analysis for the retail spaces and child care facility. Assume that the child care facility will be leased at a nominal rate of \$1.00 per year (actual terms will be negotiated with the selected Developers).
7. **Services Plan (Narrative):** Submit a Services Plan of no more than three (3) pages that is consistent with the resident services as described in Section IV.F and that includes the following information:
 - Services provider's overall philosophy and plan for providing services to Family Project and Senior Project residents, and intensive support services to formerly homeless residents.
 - Methods that have been most useful in engaging clients. Please also describe ways to tailor those methods, or develop new approaches to best serve residents of the Family and Senior Projects.
 - Describe your proposed staffing model and explain how FTE time will be allocated (note staff titles, position descriptions, salaries, and FTE). Please include resumes for key staff who would work on the family and senior programs.
8. **Services Budget:** Submit a services budget that is consistent with the Services Plan as described in Section IV.F. Please break out costs between the Senior and Family Projects or provide two distinct budgets.
9. **Marketing Plan (Narrative):** Submit a marketing plan of no more than three (3) pages that includes the following information:
 - Applicant's overall philosophy and strategy for marketing the non-HSH referred units to low-income families and seniors, particularly those receiving preference. Describe outreach elements as well as the proposed staffing model to support potential tenants through the application and leasing process, i.e. through internal staffing or through the use of a dedicated consultant.
 - Specific outreach methods that have been most useful in engaging potential applicants, as well as methods to assist applicants in compiling the leasing process. Describe ways to tailor these methods or propose new approaches to best serve tenants in both the Senior Project and Family Project.
 - Description of early rental readiness services delivery to prospective tenants, especially Certificate of Preference holders.
 - Marketing budgets for both the Senior Project and Family Project that are consistent with the Applicant's marketing plan.
10. **Massing Concept:** To allow for collaboration from concept through construction and to minimize work completed prior to developer selection, OCII emphasizes that massing presented in response to this RFP should be simplified with no architectural design (i.e. elevations). Instead, and of great importance, please provide thoughtful inspirational images and precedents to communicate the Applicant's design concept and intent. Please carefully review the submission requirements below. Submission of additional architectural drawings beyond what is shown below may result in a reduction of points in the Proposed Massing Concept category.
 - a. **Narrative:** Provide a narrative description of the design concept including the Applicant's vision and approach, and a description of construction type, building materials, and green building strategies and elements.

- b. **Drawings:** Provide the following drawings in black and white (color may be used only to differentiate program areas from one another and shall not be used to depict material finishes):
 - i. **3-D Massing Diagrams:** Two (2) diagrams depicting the conceptual building massing and scale as it relates to existing or planned buildings on surrounding lots. Diagrams should not show windows, doorways, texture, color, or detailed articulation. Applicants may use some discretion in determining the specific angles of the views presented, however, one diagram should show the building massing as seen from the north looking south (showing the frontage along the future park on Block 3) and the other should be from the south looking north (showing the Folsom Street frontage).
 - ii. **Site Plan:** at 1/32" = 1'-0" showing building massing and the relationship of buildings, open space, pedestrian mews, streets and parking areas. Indicate locations of amenities, residential lobby entrance(s), retail, housing layouts, child care space, elevator, auto ingress/egress, etc.
 - iii. **Sections:** Two (2) site sections at 1/32" = 1'-0", one longitudinal and one transverse, that best describe the massing concept.
 - iv. **Floor Plans:** Plans of all floors at 1/32" = 1'-0", showing proposed uses. Floor plans should indicate the number of bedrooms per unit, but not show unit layouts or detail layouts of any of the uses except for parking.
- c. **Inspirational Images:** Provide up to five inspirational and precedent images that illustrate aspects of the Applicant's design concept and intent. Include a short caption with each image that describes the elements that are relevant to the concept for Transbay 2.
- d. **Green Point Rating Checklist**

NOTE: The intent of the drawings is not to develop an architectural design for the Site, but to illustrate unit mix and the massing implications of the proposed development program. Applicants are required to submit only their proposed architecture massing concept in their proposal according to the criteria above.

No other drawings, renderings, elevations, or models of any kind are required or will be accepted at the time of submittal. Submittals in excess of the required materials shall be returned and will not be eligible for any payments pursuant to Section IX.G.2. Furthermore, Applicants are prohibited from presenting any additional drawings, renderings, elevations or models in excess of the accepted submission at community meetings, interviews, or Commission meetings.

B. Alternative Development Approach

1. **Statement on Potential Height Increase (Narrative):** As referenced in Section IV, pending further studies and community outreach, OCII may consider rezoning Block 2 to increase the maximum heights of the mid-rise parcel on the southern end of Block 2 East (at Folsom Street and Main Street), or the podium parcel at the southwestern portion of Block 2 West (at Folsom Street and Beale Street), or may consider height changes on both parcels. The Project would remain 100% affordable. Any potential height increases would be subject to future studies and outreach to the community. Any deviation from the DCDG requires review and approval by the OCII Commission, and may require an amendment to the Redevelopment Plan, which would need approval by the Board of Supervisors. Applicants should assume that any potential maximum heights would never exceed 240 feet.

Provide a maximum two (2) page narrative that describes an approach to increasing the building height on either or both parcels that is worthy of further studies by maximizing benefits while minimizing detriments, including shadow impacts on the Block 3 Park. No massing studies or drawings should be included in this narrative (and will not be accepted in the interview process). The narrative should address:

- a. Potential increase in total number of units on Block 2 (and how these might be split between the Family and Senior Projects);
- b. Operational feasibility and unique considerations for affordable housing projects with greater than typical unit counts in a higher density setting;
- c. Changes to financial feasibility and methods of financing;
- d. Construction types and potential construction cost efficiencies at revised building height(s);
- e. Urban design and park shadow considerations; and
- f. Experience of team members with entitlement processing and community outreach involving rezoning legislation, CEQA analysis, variances, or density bonuses.

C. Applicant Description

1. **Applicant Work Approach (Narrative):** Provide a narrative of no more than two (2) page that describes how the team, particularly the Developer and Co-Developer(s), will work together during predevelopment, construction, and in the ownership and operation of all aspects of the completed project. Clearly identify key Developer and Co-developer roles and responsibilities.
2. **Applicant Description Form (Attachment #1):** Complete the Applicant Description Form.
3. **Résumés:** Submit résumés for all persons identified on the Applicant Description Form.

D. Developer Experience & Capacity

1. **Developers' Experience in Comparable Projects:**
 - a. **Project Details (Attachment #3):** Complete the Comparable Projects Experience Form. Developers should use this chart to convey their experience in at least one (1) up to a maximum of three (3) projects completed within the past ten (10) years by the Developers, that are *comparable* to the proposed project. For purposes of this RFP, a comparable project would be an affordable rental housing project that serves low-income families or seniors of relevant size and scale. The lead Developer must include at least one (1) comparable project in which at least a portion of the population served is formerly homeless households. Photos of projects may be included, but are not required.
 - b. **Community Outreach (Narrative):** Provide a narrative of no more than one (1) page describing how the Developer and/or Co-Developer successfully conducted community outreach prior to construction commencement for the projects listed on **Attachment #3**, the Comparable Projects Experience Form.
 - c. **Commercial Experience (Narrative):** Provide a narrative of no more than one (1) page describing how both the lead Developer and Co-Developer successfully leased retail spaces in mixed-use projects to locally-based, neighborhood serving retail tenants, offering affordable goods or services to affordable housing residents. Describe outreach efforts and any incentives provided to achieve and maintain retail occupancy. Describe any experience in collaborating with OEWD or community based organizations to identify and assist prospective tenants. Describe the experience of the Developer and/or Co-Developer in providing on-site licensed child care facilities through a partnership with an outside child care organization.
2. **Developers' Experience in Other San Francisco Projects (Attachment #4):** Complete the San Francisco Projects Experience Form. Developers should use this chart to describe their experience in any other projects developed *within San Francisco only*. Photos of projects may be included, but are not required.
3. **Developers' Workload Capacity (Attachment #2):** Complete the Staffing Workload Form. All "Key Personnel" of the Developers must complete this form.
4. **Workforce and Contracting Action Plan (Narrative):** Submit a Workforce and Contracting Action Plan ("WCAP") of no more than three (3) pages describing the specific steps that the development team will take

to meet or exceed the contracting and workforce obligations in **Attachments 11 through 17** of this RFP and includes information regarding the following:

- Demonstration of the Applicant's knowledge and familiarity with OCII/City workforce and contracting policies and programs.
- The person(s) that will assume primary responsibility for working with OCII in implementing the WCAP (whether in-house or an outside consultant), the steps that the Applicant will take to meet the goals for participation by economically disadvantaged and local businesses and workers (both construction jobs and the permanent jobs covered by the First Source Hiring Program). If a consultant will implement the WCAP, please identify who within the Developer team will manage the consultant and explain how the Developer will ensure commitment and compliance with OCII's SBE and workforce goals.
- Any specific implementation actions that the Applicant proposes to achieve the best results for meeting or exceeding the goals.

E. Architect Experience & Capacity

1. Architect's Experience (Narrative):

- a. "Green" Experience: Describe green building design experience and evidence of current Green Point Rated professionals, if any.
- b. Experience with Local Regulatory Agencies: Describe experience working with OCII, MOHCD, the San Francisco Mayor's Office on Disability ("MOD"), the Department of Building Inspection, and other local government agencies.
- c. Management of an Associate Architect: Describe experience working with an associate architect(s) and how an associate architect may be utilized on this Project. Describe your approach to determining a scope of work that will enhance the Project design and ensure a meaningful experience for the selected associate architect.
- d. High Quality Design at Affordable Cost: Describe experience in designing and delivering excellent design that blends seamlessly with the surrounding environment, and is also highly efficient and cost effective. Describe how this experience has contributed to your vision for addressing cost constraints while providing a design for Transbay 2 that is appropriate to its central location at the heart of the emerging Transbay neighborhood.

2. Architect's Workload Capacity (Attachment #2): Complete the Staffing Workload Form.

3. Architect's Experience in Comparable Projects:

- a. Project Descriptions: Describe at least one (1), but no more than three (3), completed comparable developments in San Francisco. In addition, describe at least one (1) but no more than three (3) completed comparable projects outside San Francisco. For all projects, include dates completed and client contact information. (If the Architect was not the sole architect, please describe the Architect's role in the project). Selected projects should demonstrate the Architect's ability to creatively use massing, materials, and architectural design to deliver an excellent design at a viable construction cost.
- b. Photos: Submit up to six (6) photos of the interiors and exteriors of the comparable projects listed above, to display architectural design features, relationships of buildings and relationships with adjacent uses (other developments, streets, etc.). Images should include elements that are relevant to this project including residential structures, retail frontages, and townhome-style entries.

F. Property Manager Experience

1. **Approach (Narrative):** Provide a written narrative (no more than two (2) pages) describing the Property Manager's relevant experience and approach to serving residents in affordable housing communities (if different property managers are proposed for the Senior and Family Projects, please include a separate narrative for each):
 - Experience managing an affordable family community and/or experience managing an affordable senior community.
 - Experience managing properties that house formerly homeless tenants, persons with mental illness, and other relevant issues.
 - Experience collaborating with on-site and community service providers.
 - Anticipated policies and practices to ensure resident safety and stability.
 - Anticipated project management staffing (describe specific staffing for the Family and Senior Projects).
2. **Property Manager's Experience in Comparable Projects (Attachment #5):** Complete the Property Management Experience Form. If different property managers are proposed for the Senior Project and the Family Project, please complete a Property Management Experience Form for each entity.

G. Services Provider(s) Experience

1. **Approach (Narrative):** Provide a written narrative (no more than two (2) pages) describing the Services Provider's approach to providing services to residents of affordable housing.
 - Experience in providing culturally competent services and in collaborating with parties from different disciplines (e.g. developers, property management agencies, government, outside service providers, etc.) to establish safe and cohesive communities that embrace diversity and promote racial equity and cultural competency. Explain the tools and approaches that have been most useful in fostering effective, positive collaborations. Be sure to note any challenges in those partnerships and describe how those challenges were addressed. Include a list of such partnerships along with a contact for each partnering agency. (This list may be submitted as an appendix.)
 - Services Provider's understanding of the challenges facing clients transitioning from homelessness to housing. Describe the provider's approach to addressing such challenges as they arise, including achievement and maintenance of housing stability, eviction prevention, and crisis intervention, prevention, and diversion.
 - Experience in/approach to serving clients with severe and persistent mental illness and those with substance use issues, as well as approach to providing harm reduction services in a housing setting.
 - Confirm the Services Provider's conformance to the minimum qualifications listed in Section IV.F. Include at least two (2) letters of reference or the names, organizations, and contact numbers of two persons willing to act as a reference on your behalf. NOTE: References cannot be solicited from current clients. Please include a list of all programs you operate currently and the sites at which those programs operate. (This list may be included as an appendix.)
2. **Services Provider's Experience in Comparable Projects (Attachment #6):** Complete the Social Services Provider's Experience Form (if different service providers are proposed for the Senior and Family Projects, please submit a separate form for each provider).

H. Other Required Information

Note: these items need only be submitted in the original hard copy submittal and in the electronic file. Copies do NOT need to be included in the six copy sets.

1. **Developer Organizational Documents:** Submit a current copy of the following documents. NOTE: Each Developer/Co-Developer entity must submit the following:
 - a. Certificate of Status (good standing) from California Secretary of State. (Please note that the Certificate must bear the official State of California seal and that web screen prints from the Secretary of State of California website are not acceptable).
 - b. Certification of 501(c)(3) status from the Internal Revenue Service (if applicable, for any non-profit corporations).
 - c. Certification of 501(c)(3) status from the California Franchise Tax Board (if applicable, for any non-profit corporations).
 - d. The latest two (2) years of either:
 - i. signed federal income tax returns (including schedules or attachments, if any); or
 - ii. audited financial statements (with management letters, if any).
2. **Disclosure Questions (Attachment #7):** Each Developer/Co-Developer entity, as defined in Section A of **Attachment #1**, Applicant Description Form, must complete and submit the Disclosure Questions. These questions are designed to identify any potential conflicts of interest and/or liability issues. A summary of Government Code Section 87103 containing the relevant portion of the Fair Political Practices Act is included as a footnote on the Disclosure Form for reference. ***Failure to include complete, signed certifications will disqualify the submittal.**
3. **Statement of Compliance with OCII Policies (Attachment #8):** Each Developer/Co-Developer must agree to comply with all of OCII's policies, including but not limited to, SBE Policy, construction workforce requirements, and insurance and indemnification requirements found in this RFQ and shall execute the statement of compliance certifying the same. ***Failure to include a complete, signed certification will disqualify the submittal.**
4. **Offer to Negotiate Exclusively**
 - a. Form (Attachment #9): The Applicant shall complete and submit the Offer to Negotiate Exclusively. The person signing this form must have the authority to bind the entire Applicant team. ***Failure to include a complete, signed Offer to Negotiate will disqualify the submittal.**
 - b. Deposit: The Applicant shall submit an "Offer to Negotiate Exclusively Deposit" in the amount of **One Thousand Dollars (\$1,000) ("Deposit")** made payable to OCII as part of the Proposal. This payment shall be refunded to all Applicants not selected by the OCII Commission. ***Failure to include a valid "Offer to Negotiate Exclusively Deposit" will disqualify the proposal.**
5. **Submission Checklist (Attachment #10):** Complete and submit the Submission Checklist, certifying that all required items are contained in the Proposal.

THIS IS THE END OF THE SUBMISSION REQUIREMENTS SECTION.

ALL INFORMATION REQUESTED ABOVE IN SECTION VI MUST BE SUBMITTED IN ORDER FOR A PROPOSAL TO BE DEEMED COMPLETE.

APPLICANTS SCORES MAY BE NEGATIVELY IMPACTED BY ANY INCOMPLETE INFORMATION.

SECTION VII. ADDITIONAL REQUIREMENTS

(for Recommended Applicant Only)

After the evaluation panel's interviews and presentation to the CAC, the Applicant recommended to the OCII Commission by the Executive Director shall then be required to submit the following additional information *prior to OCII Commission consideration*.

DO NOT SUBMIT THESE FORMS WITH THE INITIAL PROPOSAL.

A. Nondiscrimination in Contracts & Benefits

The Applicant shall complete and submit **Attachment #11**, the Declaration of Nondiscrimination in Contracts and Benefits. OCII has established a policy prohibiting discrimination in contracting, which includes a prohibition on discrimination in providing benefits between employees with spouses and employees with domestic partners. For further information, see instructions contained in **Attachment #11** or contact Maria Pecot with OCII's Contract Compliance Department at maria.pecot@sfgov.org.

B. Small Business Enterprise Program

The Applicant shall complete and submit **Attachment #12**, the Small Business Enterprise ("SBE") Agreement. OCII has established a goal of 50 percent SBE participation on all construction, professional services, and supply contracts. OCII requires Developers to perform extensive good faith efforts to include SBEs in the performance of any agreement resulting from this solicitation, and any subsequent agreements between Developers and contractors or consultants. If SBE participation goals are not met, compelling good faith efforts must be documented and provided to OCII.

OCII strongly encourages the successful Applicant to create joint ventures or similar partnership relationships among non-SBE professional services consultants with San Francisco-based SBEs looking to build capacity and gain experience. As previously noted, the successful Applicant shall cooperate with OCII and competitively solicit a general contractor with the intent of creating a joint venture or similar partnership opportunity, to the extent practicable and economically feasible, between a general contractor and an OCII-recognized SBE contractor. Furthermore, the successful Applicant shall cooperate and require the general contractor to exercise good faith efforts to select subcontractors who either are SBEs or, if they are not, are willing to create joint ventures or similar partnership opportunities with SBEs. In addition, the selected architect will be expected to competitively solicit an associate architect and will work to define a scope that comprises approximately 35% of the overall design contract.

OCII has established a policy where the Developer shall give priority in awarding any contracts resulting from this solicitation in the following order: (1) Project Area SBEs, (2) Local SBEs (outside an OCII Project Area, but within San Francisco), and (3) all other SBEs (outside of San Francisco). Non-local SBEs should be used to satisfy participation goals only if Project Area SBEs or Local SBEs are not available or qualified, or if their bids or fees are significantly higher than those of non-local SBEs. OCII will accept the certifications of SBEs by the Contract Monitoring Division of the City and County of San Francisco and may accept SBE certifications from other agencies if the other agencies' small business size standard is consistent with OCII's.

OCII has established a trainee hiring goal for all design professionals with contracts over \$100,000 (see **Attachment #12**). To streamline the trainee hiring process, OCII has established a trainee hiring program to assist the successful Applicant with the placement of qualified local college students. OCII's trainee program augments the trainee hiring procedures set forth in the SBE Agreement. The Developer, lead architect, and selected design firms should work cooperatively with Contract Compliance staff to ensure placement goals are met on this Project.

For further information, see **Attachment #12** or contact Maria Pecot with OCII's Contract Compliance Department at maria.pecot@sfgov.org.

C. Construction Workforce Requirements

The Applicant shall comply with OCII's Construction Workforce Requirements to ensure that all contractors/subcontractors demonstrate good faith efforts to meet workforce hiring goals. OCII has established a workforce hiring goal of 50 percent for San Francisco residents.

D. Minimum Compensation Policy

The Applicant (defined throughout this RFP as the Developer, Co-Developer, Property Manager, Architect, and Services Provider) shall complete and submit **Attachment #13**, OCII's Minimum Compensation Policy ("MCP") Declaration. The MCP requires the payment of a minimum level of compensation to employees for all consultants working on OCII funded projects.

E. Health Care Accountability Policy

The Applicant shall complete and submit **Attachment #14**, the Health Care Accountability Policy ("HCAP") Declaration. The HCAP requires that contractors offer certain health plan benefits to their employees or participate in a health benefits program developed by the City's Department of Public Health, or make a payment in lieu of such benefits to the City's Department of Public Health.

F. Prevailing Wages

The successful Developer's General Contractor, including all members of any joint venture with SBEs and their subcontractors, shall comply with OCII's Prevailing Wage Policy, which includes payment of the State of California's prevailing wages.

G. Certification Regarding Insurance & Indemnification

The selected Applicant and selected contractors will be required to: 1) procure and maintain insurance that meets or exceeds OCII requirements as shown in **Attachment 21**, and as may be updated from time to time during the course of predevelopment or construction; and 2) agree to the following indemnification:

From the time of entering into a contract with OCII, the selected Applicant shall, to the fullest extent allowable by law, defend at its own expense, hold harmless and indemnify OCII, the City and County of San Francisco and their respective commissioners, members, officers, agents and employees of and from all claims, loss, damage, injury, actions, causes of action and liability of every kind, nature and description directly or indirectly arising out of or connected with the performance of OCII contract and any of the contractor's operations or activities related thereto, excluding the willful misconduct or the gross negligence of the person or entity seeking to be defended, indemnified or held harmless. The selected Applicant shall acknowledge and agree that it will have an immediate and independent obligation to defend OCII from any claim which actually or potentially falls within this indemnification provision, even if the allegations are or may be groundless, false or fraudulent, which obligation arises at the time such claim is tendered to selected Applicant by OCII and continues at all times thereafter.

SECTION VIII. OCII PAYMENTS & FEES

The selected Developers are responsible for any applicable payments, deposits and fees in connection with, but not limited to, the following:

A. RFP Fee & Offer Deposit

A RFP registration fee of Fifty Dollars (\$50.00) must be paid to OCII via check (sent in the mail), to complete registration. In addition, an Offer to Negotiate Exclusively Deposit in the amount of One Thousand Dollars (\$1,000.00) made payable to the Office of Community Investment and Infrastructure is due at the time of Proposal submission. Please include a copy of the check in the electronic submittal and the actual check along with the hard copy submittal.

B. Performance Deposit (Selected Applicant Only)

If the OCII Commission approves entering into a development contract with the Developers, then the Developers shall deposit with OCII an additional Nine Thousand Dollars \$9,000.00 ("Additional Deposit"). The Additional Deposit shall be combined with the Deposit to form the performance deposit ("Performance Deposit"). The Performance Deposit shall be held by OCII until completion of the development.

C. City Fees (Selected Applicant Only)

The selected Applicant will be responsible for payment of all applicable City fees and relevant transactional costs, including but not limited to: building permit fees, utility relocation and connection fees, subdivision fees, transfer taxes, and transit fees.

SECTION IX. ADDITIONAL TERMS & CONDITIONS

A. Selected Applicant's Team's Responsibility

The selected Applicant will be solely responsible for construction of all improvements according to OCII-approved construction documents, and in accordance with applicable City building codes. This includes, but is not limited to, all on-site improvements and any changes from existing conditions, including underground utilities, traffic signals, street lighting, curbs, gutters, street trees and sidewalks. The development team will be solely responsible for all transactional costs and closing requirements, including, but not limited to, title insurance, escrow fees, parcel maps, etc.

B. Applicant's Duty of Loyalty

Applicant for itself and its Contractors agree to abide by OCII's duty of loyalty, which appears in OCII's Personnel Policy (Prohibited Activities of Present and Former Employees, Commissioners and Consultants) and which states in part the following: "Unless approved in advance in writing by OCII, no present or former employee, Commissioner or consultant of OCII shall knowingly act for anyone other than OCII in connection with any particular matter in which OCII is a party, or has a direct and substantial interest, and in which he or she participated personally and substantially as an OCII employee, Commissioner or consultant whether through decisions, recommendations, advice, investigation or otherwise. Violation of this section by a present employee, consultant or Commissioner may, in the case of an employee or consultant, be grounds for discharge or termination of the consultant contract, and in the case of a Commissioner, be considered misconduct in office pursuant of California Health and Safety Code Section 33115."

C. OCII Non-Responsibility

OCII has no obligation to demolish any improvements on the Site, remove, relocate or install utilities, complete on-site or off-site preparation work or improvements, or make any changes whatsoever to existing conditions.

D. Geotechnical Investigations

All geotechnical investigation must be conducted by a licensed geotechnical engineer, retained by the Applicant, to investigate and supervise excavation and recompaction efforts as necessary, which investigations may only occur upon the issuance of a permit to enter the Site.

E. Environmental Review Approvals

The selected Developers will be responsible for securing all environmental review approvals necessary to move forward with the development of the Site. These reviews may include the requirements of the California Environmental Quality Act (“CEQA”), the National Environmental Protection Act (“NEPA”) and/or Section 106 of the National Historic Preservation Act (“NHPA”), as applicable.

F. Accessibility Requirements

The selected Developers will be responsible for meeting all applicable accessibility standards related to publicly-funded multifamily housing development under Section 504 of the Rehabilitation Act of 1973, the Architectural Barriers Act, the Americans with Disabilities Act, the Fair Housing Amendments Act of 1988, and Title 24 of the California Code of Regulations. If the Project relies on tax credit or other sources of funding, additional accessibility requirements may apply. If selected, Applicants must submit the permit set of architectural plans for the Site to the Mayor's Office on Disability for review and approval. Additionally, OCII requires an architect's certification at the completion of project design and construction that the improvements built are in accordance with all local, state and federal laws and regulations with respect to access for persons with disabilities.

G. Applicant Expenses

1. The Applicant responding to this RFP does so at its own expense. OCII will not consider any costs related to preparing the proposal or negotiating the development contract as reimbursable. The foregoing notwithstanding, OCII will reimburse the cost for architectural massing drawings required by this RFP as set forth in Section IX.G.2 below.
2. OCII is requiring the submittal of an architectural massing concept as part of this RFP. In order to mitigate some of these costs to the Developers submitting proposals, OCII will reimburse those Developers whose principal office is located in San Francisco and whose proposal, in the sole discretion of OCII, has met each of the minimum qualifications described in Section VI Submission Requirements of this RFP. The total aggregate payment for architectural reimbursables by OCII shall not exceed \$50,000 and payments to Applicants who submit complete proposals shall be prorated accordingly, in an amount not to exceed \$5,000 per Applicant. Qualifying Developers seeking architectural reimbursement payments must submit invoices from their architects.

H. OCII Right to Modify or Suspend RFP

OCII, through its Executive Director, reserves the right at any time, in its sole and absolute discretion, to modify or suspend any and all aspects of the selection process, including, but not limited to, this RFP and all or any portion of the contractor selection process in or subsequent to the RFP; to obtain further information from any Applicant member, to waive any defects as to form or content of the RFP or any other step in the selection process; to reject any and all responses submitted; to reissue the RFP; procure the desired services by any other means or not proceed in procuring the services; to negotiate with any, all, or none of the respondents to this RFP as to fees, scope of services, or any other aspect of the RFP or services; to negotiate and modify any and all terms of an agreement; and to accept or reject any Applicant.

I. Claims Against OCII

Each Applicant member, by responding to this RFP, waives any claim, liability or expense whatsoever against OCII and its respective officers, commissioners, employees and agents by reason of any or all of the following: any aspect of this RFP, the selection process or any part thereof, any informalities or defects in the selection process, the failure to enter into any agreement, any statements, representations, acts or omissions of OCII, the exercise of any discretion set forth or concerning any of the foregoing, and any other matters arising out of all or any of the foregoing.

SECTION X. ATTACHMENTS

To be submitted with Submission Package:

Attachment #1:	Applicant Description Form
Attachment #2	Staffing Workload Form
Attachment #3	Comparable Projects Experience Form
Attachment #4	San Francisco Projects Experience Form
Attachment #5	Property Manager Experience Form
Attachment #6	Services Provider Experience Form
Attachment #7:	Disclosure Questions
Attachment #8:	Statement of Compliance with OCII Policies & Certification of Applicant
Attachment #9:	Offer to Negotiate Exclusively
Attachment #10:	Submission Checklist

To be completed by recommended Developers only after evaluation and interviews:

Attachment #11:	Declaration of Nondiscrimination in Contracts and Benefits
Attachment #12:	Small Business Enterprise Agreement
Attachment #13:	Minimum Compensation Policy Declaration
Attachment #14:	Health Care Accountability Policy (HCAP) Declaration
Attachment #15:	Prevailing Wage
Attachment #16:	Permanent Workforce
Attachment #17:	Construction Workforce

For informational purposes only:

Attachment #18:	Area Median Income and Rent Levels for 2019
Attachment #19:	MOHCD/OCII Sources and Uses, Operating Budget and 20 Year Cash Flow
Attachment #20:	City of San Francisco Child Care Facilities Interagency Committee Best Practices Facility Requirements and State Child Care Center General Licensing Requirements
Attachment #21:	OCII Insurance Requirements