



450-0232021-002

Agenda Item **No. 5(c)**
Meeting of October 19, 2021

MEMORANDUM

TO: Community Investment and Infrastructure Commissioners

FROM: Sally Oerth, Interim Executive Director

SUBJECT: Authorizing a Personal Services Contract with Scholarship America for Scholarship Application and Management Services on behalf of the Legacy Foundation for Bayview Hunters Point for the Lennar Bayview Scholarship Fund and the College Living Stipends Fund for a contract term of five academic years to expire no later than January 31, 2027, and a total contract amount not to exceed \$547,500 (including up to \$40,000 for costs of administration) from the Phase 1 and Phase 2 Community Fund for Scholarship Administration and Awards; Hunters Point Shipyard and Bayview Hunters Point Redevelopment Project Areas

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At the recommendation of the Legacy Foundation for Bayview Hunters Point ("Legacy Foundation"), the Office of Community Investment and Infrastructure ("OCII") proposes to enter into a Personal Services Contract with Scholarship America, Inc., in an amount not to exceed \$547,500 (including up to \$40,000 for administrative fees) for a contract term of up to approximately 63 months (terminating January 31, 2027), for scholarship application and administration services for the award of \$507,500 in scholarship funds from the Hunters Point Shipyard/Bayview Hunters Point Phase 1 and Phase 2 Community Benefit Funds. The proposed Personal Services Contract is consistent with the Legacy Foundation's Five-Year Strategic Plan, which utilizes \$475,000 from the Phase 2 Community Benefits Fund and \$72,500 from the Phase 1 Community Benefits Fund specifically for the purpose of providing educational support through scholarships to make postsecondary education possible for Bayview Hunters Point students (the "Scholarship Program"). The details of the Legacy Foundation's analysis of community needs and programming information for the remaining funds are contained in the Five-Year Strategic Plan (Attachment B).

Staff recommends approval of the Personal Services Contract with Scholarship America for Scholarship Application and Management services, in an amount Not-To-Exceed \$547,500 for student scholarship awards and scholarship administration from the Phase 1 and Phase 2 Community Benefit Fund.

BACKGROUND

The Hunters Point Shipyard Phase 1 Disposition and Development Agreement ("Phase 1 DDA") requires the establishment and funding of a Community Benefits Fund for the benefit of the greater Bayview Hunters Point ("BVHP") area, and calls for the establishment of the Legacy Foundation to represent the interests of the BVHP community in advising OCII on the programming of Community Facilities Parcels and disposition of Community Benefits Funds. The Community Benefits Plan of the Disposition and Development Agreement for Candlestick Point and Hunters Point Shipyard Phase 2 ("Phase 2 DDA") requires additional Community Benefits Funds contributions and carries forward the role of the Legacy Foundation. The Community Benefits Fund is supported through contributions from the Phase 1 and Phase 2 Developer, and OCII currently has approximately \$1.26 million in funds to be programmed to benefit the BVHP neighborhood in accordance with the Legacy Foundation Strategic Plan.

DISCUSSION

Legacy Foundation's Mission and Goals

The Legacy Foundation's fundamental mission is to alleviate the impact of poverty in San Francisco's BVHP community. The Legacy Foundation's main purpose is to ensure that a designated portion of net proceeds from the Hunters Point Shipyard development will be used and invested for the benefit of the BVHP community. The entity is charged with making recommendations that guarantee the BVHP area and not just a few individuals, benefit from the funds that are intended to be used to: (a) benefit low and moderate-income families, (b) eliminate blight, or (c) meet other urgent community development needs of the BVHP area.

In pursuing its mission and strategies, the Legacy Foundation has identified three areas of priority: 1) Community and neighborhood building, 2) Improving education and employment opportunities, and 3) Expanding homeownership opportunities.

Education

The Legacy Foundation's mission is to mobilize, through scholarship funds, educational support to make postsecondary education possible for all Bayview Hunters Point students. The Legacy Foundation's vision is to be a leader in providing scholarships and other financial support to students residing in the BVHP community, to make the completion of education beyond high school a reality. Reducing the financial barriers that would otherwise prevent or inhibit qualified students from attending college is a major focus of the Foundation.

The Scholarship Program

The Legacy Foundation originally had set aside an estimated \$22,500 for scholarship administrative fees and allocated a total of \$525,000 in funds for the Scholarship Program, which consists of earmarks of \$50,000 for college living stipends and \$475,000 for the Lennar BVHP Academic Scholarship Fund. Students, up to age 30, residing in the BVHP community that wish to attend college or other post-secondary education programs and can demonstrate financial need will be eligible for the scholarships. The Scholarship Funds and Award Level Criteria are as follows:

1. College Living Expenses - \$50,000
 - Awards to accompany academic scholarships
 - \$500/year scholarships for certificate and two-year programs
 - \$1,000/ year scholarships for four-year and graduate programs

2. Lennar BVHP Academic Scholarship Fund & Administrative Costs – Up to \$497,500*
 - Program and Eligibility Criteria:
 - Youth and young adults, up to age 30, residing in BVHP
 - Diploma, Certificate, Degree program offered by a college, university, community college, technical or trade school recognized by any of the six regional higher education accreditors, including the Western Association of Schools and Colleges
 - Income limit and demonstrate financial need
 - Scholarships shall be awarded annually (students must apply each year)

 - Tuition Award Levels:
 - Tuition Award = \$1,000 - \$2,700/year (diploma or certificate programs, amount of awards will be based on tuition/enrollment fees and student needs)
 - Prestigious Award = \$5,000/year (reserved for students enrolled in 4-year & graduate programs with minimum 3.5 GPA)
 - Students renewing applications must have a minimum 2.5 GPA (or “passing” grades if academic program does not use letter grades or GPA)

*Funding resources for the scholarship manager services were estimated and programmed in 2017 at \$22,500 pursuant to the Legacy Foundation’s Five-Year Strategic Plan. However, to ensure adequate management services and account for escalation, management fees have been budgeted and capped at \$40,000 in this Contract but actual expenses may be less based on the number of scholarship applications processed and services rendered. Accordingly, the original Lennar BVHP Academic Scholarship Fund amount of \$475,000 may be reduced by as much as \$17,500 (the difference between \$40,000 less \$22,500), but it is OCII’s intent to minimize actual fees and maximize the amount available for scholarships. In the fifth and final year of the Contract, any unspent management fees will be added to the scholarship fund pool and distributed as scholarships.

Income limits to determine student eligibility for the scholarship award will be based on the Area Median Income (“AMI”) for HUD Metro Fair Market Rent Area for San Francisco and will be set at 100% AMI. Students will be able to determine immediately, if they are eligible for a scholarship.

Request for Proposals (RFP) Issuance

In accordance with OCII’s Purchasing Policy, staff issued an RFP on April 7, 2021, seeking a Scholarship Services Manager(s) or Scholarship Management Services Team to manage a Scholarship Program for Bayview Hunters Point students who wish to attend college or other post-secondary education programs. The Scholarship Manager will be responsible for the entire process from creating, receiving, processing, and screening the scholarship applications for two scholarship funds: (1) the Lennar BVHP Academic Scholarship and (2) College Living Stipend funds, and for producing reports. The RFP included a preference that there be one application allowing applicants to apply for both funds. The Legacy Foundation’s intent is that the college living expense stipends accompany the academic scholarships for students that are eligible to receive both awards.

The RFP was advertised on the OCII website, on the City and County of San Francisco’s website, through the Hunters Point Shipyard Citizen Advisory Committee (“CAC”) electronic mailing list, on the SF Bayview’s website (a local BVHP publication) and sent to various community-based organizations and non-profits that provide services to students and young adults. Staff responded to questions from prospective proposers on April 27, 2021.

Selection and Vendor Recommendation

OCII received one proposal, from Scholarship America, in response to the RFP. Staff confirmed the completeness of the proposal and responsiveness in accordance with the requirements of the RFP and OCII’s Purchasing Policy. Subsequently, on May 19, 2021, a panel consisting of two Legacy Foundation members and one OCII staff person reviewed the proposal.

After evaluating the respondent’s proposal, assessing their experience managing scholarships of similar size, demonstrated ability to provide services in underserved and underrepresented communities, ability to operate an online application system, and proposed fees, the panel determined that Scholarship America demonstrated an ability to provide the required services, with an overall averaged score of 95 points out of a possible 100. OCII’s Contract Compliance staff was involved in the solicitation and selection process, reviewed the scores, and determined the process was fair and reasonable. Scholarship America submitted a proposal that demonstrated ample and relevant experience and during discussions, provided recommendations on a schedule and how the scholarship program can be rolled out to best assist students.

On May 27, 2021, the Legacy Foundation Board voted unanimously to recommend that OCII enter a contract for Scholarship Management services with Scholarship America based on their experience and expertise in scholarship application and management services.

Scholarship America

Established in 1958, Scholarship America (<https://scholarshipamerica.org/>) is one of the nation's largest non-profit scholarship and education support organizations. Scholarship America supports thousands of unique scholarship and education assistance programs for local communities, businesses, foundations, associations, nonprofits, and philanthropic individuals, including a network of locally based Dollars for Scholars. Scholarship America has been hosting and managing online scholarship applications for over 20 years. On average, Scholarship America reviews 250,000 applications and awards \$225 million to 100,000 students each year.

Scope of Services

Scholarship America will design and create a customized, branded landing page and customized online application for the Scholarship Program within their scholarship application software. The landing page will describe the overall program including guidelines, selection criteria, application process and timing and will display and incorporate the Legacy Foundation and OCII's logos (colors, photos, etc.) throughout.

All questions on the application will be customized to meet the specific requirements and criteria of the Scholarship Program, and each screen of the application will contain a manageable number of questions that are logically grouped together by information type. The Scholarship America team will review and test the website before sending it for review. They estimate that on average, an application can be completed in 20-30 minutes. In addition to demonstrating compliance with age requirement, program enrollment, BVHP residency, and minimum GPA, students will also be required to demonstrate financial need. Students will be required to provide information from their Free Application for Federal Student Aid ("FAFSA") application or tax related documents to verify that they do not exceed the maximum income, based on household size.

After confirming the eligibility of applicants, Scholarship America will reach out to notify them of their award and send acceptance and release forms and a request to verify school enrollment prior to payment of awards. Each scholarship recipient's intention to accept the scholarship, and their agreement to the terms and conditions of the scholarship, will be confirmed in writing. Scholarship America will invoice OCII for both their administrative costs and for the applicable award amounts, and upon receipt of the funds from OCII will handle the disbursement of funds to the recipients.

At the end of each program cycle, Scholarship America will provide the Legacy Foundation and OCII with reports that summarize the program year and provide any recommendations for the upcoming year.

Term and Costs

Staff recommends a contract term that encompasses five academic years with a total not-to-exceed amount for the contract of \$547,500, which includes at least \$507,500 for funding scholarships and stipends and at most \$40,000 for management and administrative services. This amount differs from the original Legacy Foundation recommendation of a \$525,000 total amount for Scholarships, because staff recommends a slightly higher allocation for management and administrative fees based on the contractor's estimate to ensure sufficient coverage for application services. Any unspent management fees will be added to the scholarship fund pool. The estimated annual distribution for awards and stipends will be approximately \$101,500, with the anticipation that the final distribution in the fifth year will be adjusted upwards should final management and administration fees be determined to be less than \$40,000.

Marketing and Promotions

OCII, the Legacy Foundation will work the CAC to issue notices and promote the availability of the scholarships to various non-profit, community and faith-based organizations that provide services in BVHP. OCII and the Legacy Foundation will also reach out to the SF Unified School District to provide targeted notices to high-school seniors in BVHP. The Legacy Foundation will also work with the District 10 Supervisor's Office to promote the availability of the scholarships as well.

Community Benefits Fund Awards

To date, the Legacy Foundation has awarded \$25,000 to the Urban Ed Academy to help fund a Bayview Hunters Point Hacker Hub; a technology instruction and resource center for students living or attending school in Bayview. This award was based on a successful response to an RFP to provide equipment, technology services, and education to students in BVHP. The RFP was administered in accordance with the OCII contracting and procurement policy. In October 2020, OCII entered into a Memorandum of Agreement, transferring \$180,000 to the Mayor's Office of Housing and Community Development ("MOHCD") to administer the Legacy in Town ("LIT") Homeownership Down Payment Assistance Program.

CALIFORNIA ENVIRONMENTAL QUALITY ACT

Scholarship fund management and related support services are an administrative activity that does not constitute a "project" as defined by the California Environmental Quality Act ("CEQA") pursuant to CEQA Guidelines Section 15378(b)(5), will not independently result in a physical change in the environment, and is not subject to environmental review under CEQA.

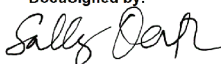
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STAFF RECOMMENDATION

Staff recommends that the OCII Commission authorize the Executive Director to enter a Personal Services Contract with Scholarship America for scholarship awards and management services for five academic years to terminate no later than January 31, 2027, for an amount Not-To-Exceed \$547,500.

(Originated by: Kasheica McKinney, Assistant Project Manager)

DocuSigned by:

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Sally Oerth

Interim Executive Director

Attachment A: Legacy Foundation Five-Year Strategic Plan



LEGACY FOUNDATION FOR BAYVIEW HUNTERS POINT 2017-2022 STRATEGIC PLAN

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

THE LEGACY FOUNDATION FOR BAYVIEW HUNTERS POINT

*Helping to Lay the Foundation for the Future of the Bayview Hunters
Point Community*

February 7, 2017

Dear Commissioners of the Office of Community Investment and
Infrastructure:

The Legacy Foundation for Bayview Hunters Point ("Legacy Foundation") seeks approval from the San Francisco Commission on Community Investment and Infrastructure ("OCII Commission") to carry out the strategic priorities set forth in this Strategic Plan for neighborhood building, education and workforce training, and homeownership initiatives.

The Legacy Foundation will report annually on its progress, and seek ratification and ongoing approval from the OCII Commission, as required by the OCII's policies and the Disposition and Development Agreements that established the Legacy Foundation's mandate and resources to invest in the Bayview Hunters Point community.

Pursuant to these commitments, the Legacy Foundation requests the OCII Commission direct staff to implement the programs described in the Strategic Plan. The Legacy Foundation will monitor the progress of community based organizations and individuals that we support in order to achieve the outcomes described.

The Legacy Foundation thanks the OCII Commission for providing staff and administrative support that furthers the implementation of the community benefits associated with the Hunters Point Shipyard and Candlestick Point development.

The Legacy Foundation thanks Amabel Akwa-Asare and Kasheica McKinney for their impeccable staffing of our board development process including planning of this Strategic Plan. The Legacy Foundation also thanks the consulting firm of Carla Dartis for facilitating and conducting the due diligence that helped to produce this plan.

Respectfully Submitted,

Tedd Hunt
Chairperson, Legacy Foundation

2016 LEGACY FOUNDATION BOARD

Tedd Hunt

Chairperson

Pastor Joesiah Bell

Board Member

Carmen Kelly

Board Member

**Dr. Veronica
Hunnicut**

Board Member

Lila Hussain

Board Member

A SPECIAL THANK YOU...

Our gratitude to Mayor Lee for quickly moving ahead to establish the Office of Community Investment and Infrastructure (OCII) after the dissolution of the SF Redevelopment Agency to prevent any interruption in the pipeline projects; and to The San Francisco Board of Supervisors for stepping in when it mattered to enact necessary legislative changes to the Redevelopment Plan as needed.

The Legacy Foundation Board is especially grateful to Mr. Kofi Bonner, Regional President of FivePoint, for his leadership and extensive expertise in development matters, and for his excellent crisis management skills, and for providing pertinent resources and staff support of the stakeholders. The Legacy Foundation recognizes the tremendous progress to date and the various contributions made by the developer to fulfill its obligations. The Board is also pleased with the developers' contributions outside of the Board's purview, to various community causes, especially community building activities, which enhance the quality of life for individuals in the BVHP community.

To all the stakeholders, especially the esteemed Mayor's Hunters Point Shipyard Citizens Advisory Committee (CAC), under Dr. Veronica Hunnicutt's leadership, and our community residents, we thank all of you for your commitment to ensuring that the HPS/Candlestick Point development keeps moving forward.

The Legacy Foundation is also grateful to the many participants who contributed to these planning efforts, including the 2009 San Francisco Redevelopment Agency Board of Commissioners, Fred Blackwell – former San Francisco Redevelopment Agency Executive Director, Junious Williams – former CEO of the Urban Strategies Council, the Mayor's Office of Community and Housing and Development, San Francisco Office of Workforce and Economic Development, San Francisco Unified School District, San Francisco Public Utilities Commission, Department of Children Youth and Families, San Francisco Public Health Department, San Francisco City College, San Francisco State University, Stanford University, Tides Center and Tides Foundation, Community Initiatives, Pacific Foundation Services, District 10 Supervisor Malia Cohen and staff members, BMAGIC, OldSkool Café, College Track, Mission Bits, University of San Francisco, California Academy of Sciences, Exploratorium, the California Endowment Foundation, the California Wellness Foundation, the Bechtel Jr. Foundation, Haas Jr. Fund, the Bayview Community Foundation Fund, the San Francisco Foundation, Success Center San Francisco, YMCA of Bayview Hunters Point, and many more leaders from Bayview Hunters Point-based community based organizations. This process would not have been the same without their input and we appreciate their generous contributions.

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THE LEGACY FOUNDATION FOR BAYVIEW HUNTERS POINT

The Legacy Foundation for Bayview Hunters Point (“Legacy Foundation”) was established as part of the Bayview Hunters Point Shipyard Redevelopment Project to intentionally strengthen Bayview Hunters Point’s human development capacity as the neighborhood’s physical environment undergoes transformation. The Legacy Foundation’s recommendation to the Commission on Community Investment and Infrastructure (“OCII Commission”) on the use of the Community Benefit Funds is based on years of study and analysis of community needs, as well as community input. As used throughout this Strategic Plan, Bayview Hunters Point (“BVHP” or “BVHP Area”) includes the areas encompassed within the 94124, 94134 and 94107 zip codes.

The development program for Hunters Point Shipyard and Candlestick Point calls for more than 12,000 new homes (approximately 32% of which will be below market rate and will include the rebuilding of the Alice Griffith public housing development consistent with the City’s HOPE SF program), up to 3 million square feet of research and development space, and more than 350 acres of new parks in the southeast portion of San Francisco (together, the “Project”). The Project is a public-private partnership overseen by the former San Francisco Redevelopment Agency, now the Office of Community Investment and Infrastructure (“OCII”). The master developer for the Project is FivePoint.

The Legacy Foundation was created by the Hunters Point Shipyard Phase 1 Disposition and Development Agreement (“Phase 1 DDA”) between the former San Francisco Redevelopment Agency, now OCII, and HPS Development Co. LP, a subsidiary of FivePoint. The DDA went into effect December 2, 2003. The Phase 1 DDA led to the formation of the Legacy Foundation, called “BVHP Representative Entity” that, in collaboration with the Hunters Point Shipyard Citizens Advisory Committee (“HPS CAC”), is charged with analyzing community needs and making recommendations to the OCII Commission on the use of the Community Benefits Fund (“Phase 1 Fund”).¹

The Phase 1 DDA provided the following Key Principles for the Legacy Foundation:

- The governing body will have meaningful community representation, with members recruited and selected through an open and fair public process;
- As a quasi-public body, the Legacy Foundation will operate in conformance with all applicable laws and regulations governing conflicts of interest and open public meetings;
- The [Legacy Foundation] will be charged with making recommendations that ensure the BVHP Area and not just a few individuals benefit from the use of the [Phase 1 Fund];
- Transparency and public accountability will necessarily guide all operations and actions of the [Legacy Foundation];
- Use of funds will focus on building the capacity of existing community-based entities wherever possible; and
- Use of funds will be geared towards leveraging additional outside sources of funds to the maximum extent possible.

¹ Phase 1 DDA, Community Ownership, Financing & Benefits, § 2.1.

The Phase 1 DDA required that the Phase 1 Fund be used to Benefit low- and moderate-income families; eliminate blight; or meet other urgent community development needs of the BVHP Area.²

Additionally, the Phase 1 DDA lists the following Permitted Uses of funds recommended by the HPS CAC:

- Financial and technical assistance for non-profit and for-profit community organizations and enterprises in acquiring and/or developing properties in the Shipyard, including, without limitation, assistance with respect to developing the Community Facilities Parcels;
- Financial assistance for construction and operation of additional community facilities;
- Affordable housing assistance, including without limitation using such funds to effectively reduce the maximum income levels for purchase or rental of the Affordable Housing Units through down payment assistance and other subsidies;
- Small business loan programs, including establishing a revolving loan fund;
- Additional financial assistance for existing job training, education, hiring and contractor selection programs;
- Community-based financial services;
- Childcare, youth and senior programs;
- Cultural and arts related programs;
- Development of new programs or institutions required to implement the Redevelopment Plan;
- Enhancements to infrastructure systems;
- Enhancements to recreational and open space facilities and programs;
- Leveraging such funds through available methods, such as foundation funding; and
- Providing investments in Community Builders who undertake Vertical Development, either as a silent or an active partner.³

Contributions to the Phase 1 Fund were redefined in accordance with the Fifth Amendment to the Phase 1 DDA, adopted November 3, 2009. This amendment established a “Community Benefits Fund Advance” under which the Developer contributed one million dollars (\$1,000,000).⁴ Additional contributions to the Phase 1 Fund may occur after proceeds from land sales repay defined development costs.⁵ However, no additional contributions to the Phase 1 Fund are anticipated at this time.

The Phase 1 DDA also created Community Facilities Parcels. The purpose of the Phase 1 Community Facilities Parcels is to provide, preserve and leverage local resources such as social services, education services, and other community services as determined by OCII in collaboration with the HPS CAC and the Legacy Foundation.⁶ As guiding principles, the Phase 1 DDA says that the Community Facilities Parcels should be used in a manner that will enhance the overall quality of life of residents at the Shipyard and in the BVHP Area; and support the creation of a vibrant new Shipyard neighborhood.

The Phase 1 DDA Community Facilities Parcels originally contemplated six acres of land located on both Navy Parcels A and B. However, due to delays in transfers from the U.S. Navy, Phase 1 only

² Phase 1 DDA, Community Ownership, Financing & Benefits, § 3.

³ Phase 1 DDA, Community Ownership, Financing & Benefits, § 3.

⁴ Phase 1 DDA, 5th Amendment, § 1.

⁵ Phase 2 DDA, 5th Amendment, § 8.b.

⁶ Phase 1 DDA, Community Ownership, Financing & Benefits, § 1.

encompasses Navy Parcel A, and Navy Parcel B was incorporated into the second phase of development at the Shipyard.

To date, one Community Facilities Parcel has been developed and is the site of the OCII Site Office and Store House (a convenience store and coffee shop). It also serves as a community room, hosting HPS CAC Sub-Committee and other project-related meetings. The building was funded through grants provided by the U.S. Department of Commerce, Economic Development Administration (“EDA”). The remaining 1.2 acres of Phase 1 Community Facilities Parcels remain un-programmed.

On June 3, 2010, the former San Francisco Redevelopment Agency, now OCII, and CP Development Co. LP, a subsidiary of the Developer, entered into the Candlestick Point and Hunters Point Shipyard Phase 2 Disposition and Development Agreement (“Phase 2 DDA”). The Phase 2 DDA Community Benefits Plan also created a Community Benefits Fund (“Phase 2 Fund”) and calls for the Legacy Foundation to analyze community needs and make recommendations to the OCII Commission on the use of the Phase 2 Fund.⁷

The Phase 2 Fund is funded by payments from each Vertical Developer of an amount equal to one-half of one percent (0.5%) of the sales price for each market rate unit. The Phase 2 development program calls for the development of 7,155 market rate units over the next 15 to 20 years. The remaining 3,345 housing units called for under the development program will be provided at below-market rates. The first market-rate home sales in Phase 2 are anticipated to occur in 2020.

Per the Phase 2 DDA, the Phase 2 Fund must be reinvested by OCII in the Project Site and BVHP Area to benefit low- and moderate-income families; eliminate blight; and/or meet other community development needs of BVHP as determined by the Legacy Foundation, including those related to social services, affordable housing, education, the arts, public safety, assistance for senior citizens and other community services.⁸

The Phase 2 DDA requires that disbursement from the Phase 2 Fund by OCII occur following consultation with the HPS CAC and is subject to approval by the OCII Commission.

The Phase 2 DDA also created the “Lennar Bayview Scholarship Fund,” which is held as part of the Phase 2 Fund.⁹ The Lennar Bayview Scholarship Fund will be used:

To assist youth and adults up to age thirty (30) living in BVHP with the cost of tuition and/or educational materials for any course in support of any educational program that grants a diploma, degree or certificate of completion that is offered by a college, university, community college, technical or trade school recognized by any of the six regional higher education accreditors, including the Western Association of Schools and Colleges.

In addition, the Lennar Bayview Scholarship Fund will be used to fund “The Will Bass Memorial Educational Travel Scholarship” which will annually award Five Thousand Dollars (\$5,000) for educational travel to Africa or Asia to one African American student (18 to 25 years old) from BVHP.

⁷ Phase 2 DDA, Community Benefits Plan, § 6.

⁸ Phase 2 DDA, Community Benefits Plan, § 6.

⁹ Phase 2 DDA, Community Benefits Plan, § 1.1

Funds for Lennar Bayview Scholarship Fund are contributed by the Developer after the first Major Phase Approval for the Phase 2 Project (\$500,000), and then following housing development milestones (\$300,000 per 1,000 Unit Credits). The OCII Commission approved the first Major Phase for Candlestick Point in January 2014, and the Developer has accordingly provided \$500,000 in funding for the Lennar Bayview Scholarship Fund. It is anticipated that the 1,000 Unit Credit would occur in 2018.

Finally, the Phase 2 DDA requires if, after receiving 5,250 Unit Credits, OCII determines funds are not needed for the expansion of the Southeast Health Center or the Center for Youth Wellness (a community health facility provided for under the Phase 2 DDA Community Health and Wellness provisions) the funds be reallocated to the Phase 2 Fund for programming related to the health and wellness of residents in the Project Site and in BVHP, including respiratory illness prevention and treatment.¹⁰ At this time, the San Francisco Department of Public Health is continuing pre-development activities for the expansion of the Southeast Health Center, and additional funding for wellness programs is not anticipated for the Phase 2 Fund.

BOARD OF DIRECTORS

The Legacy Foundation is overseen by a Board of Directors. There are seven Appointed Directors, and the Appointed Directors may elect up to four additional directors for a maximum of eleven Directors. The following entities select the Appointed Directors:

- The San Francisco Mayor
- The San Francisco District 10 Supervisor
- The Office of Community Investment and Infrastructure
- The Hunters Point Shipyard Citizens Advisory Committee
- An at-large member (Bayview CAC).

Currently, the Board of Directors is comprised of six Appointed Members:

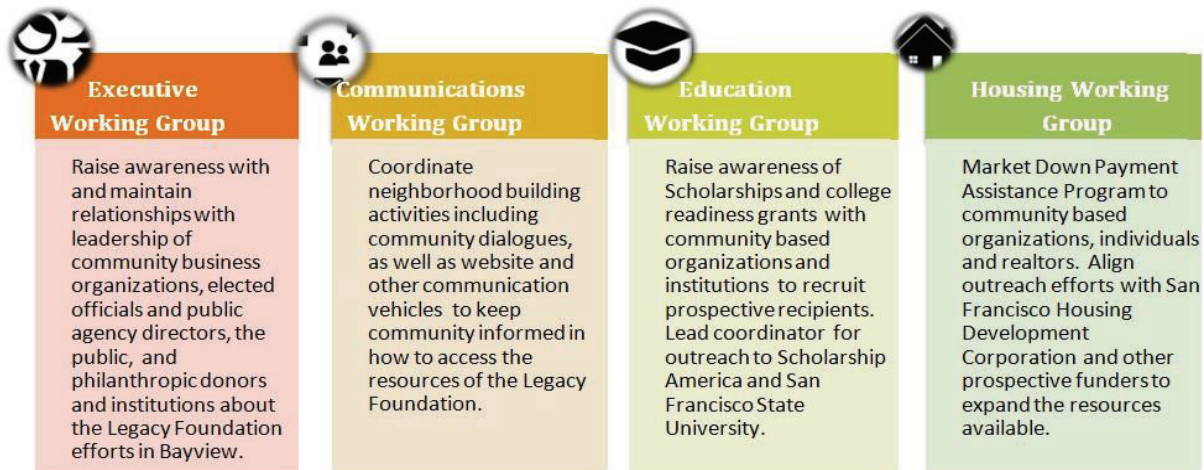
- Tedd Hunt (Chairperson), Member At-Large
- Pastor Josiah Bell, HPS CAC Representative
- Carmen Kelly, District 10 Supervisor Representative
- Dr. Veronica Hunnicutt, HPS CAC Representative
- Lila Hussain, OCII Representative
- Vacant, Mayor's Representative

The Board intends to fill the six remaining vacant Board seats, in accordance with the Legacy Foundation's bylaws, in early 2017. Each Director serves a staggered term of up to three years, not to exceed two consecutive terms. The Legacy Foundation is currently not a 501(c)(3) organization.

WORKING GROUPS

The implementation plan for each program will be fully developed through Working Groups. Board members will work on one or more of the following four working groups: Executive, Education, Housing, and Communication.

¹⁰ Phase 2 DDA, Community Benefits Plan, § 2.



Mission and Core Values

The Legacy Foundation is driven by both its mission and its mandate; this plan articulates the Foundation's priorities and goals, and the strategies on how its mission will be affected. The Legacy Foundation is committed to building, strengthening, and maintaining the key elements of the Bayview Hunter's Point community, its residents living in San Francisco's BVHP community, District 10, and 94124 zip code, its partners, and its financial strength.

MISSION

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

CORE VALUES

The Board of Directors has adopted the following core values to guide the Legacy Foundation's decision-making and relationships between board members, with partners, and the Bayview community:

- **Transparency** *We understand the need for openness, accountability and disclosure.*
- **Integrity** *We are honest and ethical.*
- **Respect** *We understand that people should be treated with deference.*
- **Accountability** *We use resources wisely; we take responsibility; we are transparent.*
- **Collaboration** *We work in partnership; we leverage resources.*
- **Community Impact and Empowerment** *We improve lives; and work to strengthen communities.*

As a discerning community body that puts the needs of Bayview Hunters Point's residents first, the Legacy Foundation is dedicated to building respectful relationships with individuals and organizations that are committed to tangible and beneficiary results that improve life in the Bayview, and consistently demonstrate that commitment.

In the words of the Board of Directors: "We will always lead as a trusted ally."

Vision of Change

The Legacy Foundation envisions a future where all residents in Bayview Hunters Point thrive; realizing their life potential and personal leadership in leading their own lives and supporting others to have successful and productive lives in and out of the Bayview Hunters Point Community.

The Foundation believes that by holding itself to high-standards and leveraging strong partnerships with public sector, community based and philanthropic organizations, businesses, individuals, and academic institutions to provide targeted assistance to critical opportunity gaps in Bayview Hunters Point – it can be an instrument in realizing this vision.

This kind of steadfast collective action is one of the Legacy Foundation's most effective tools in supporting a positive life outlook for many Bayview Hunters Point residents who continue to be impacted by the ill effects of discrimination, multi-generational poverty, and income inequality.

STRATEGIC AMBITIONS

In pursuing its mission and strategies, the Legacy Foundation will be clear about its strategic priorities for neighborhood building, improving education and employment opportunities, and expanding homeownership opportunities.

The Legacy Foundation will measure its progress in pursuing its mission and strategies through an overall system of strategy management and annual results reporting. This Strategic Plan will serve as a framework to further develop the Legacy Foundations operating plans. As a framework, the Strategic Plan identifies key strategic priorities, but is not intended to provide exhaustive details of the Legacy Foundation's activities for the next five years.

Over the next five years the focus of this Strategic Plan as conceptualized by the Board of Directors is to improve well-being outcomes in BVHP community. This bold and courageous decision is grounded in the commitment to achieve tangible, life-improving results where needs are great, compared to the amount of investment currently available.

The Legacy Foundation has identified three strategic goals on which to focus funding between now and 2021:

- (1) Neighborhood Building
- (2) Education & Workforce Improvement
- (3) Expanding Homeownership & Retention

The priorities and strategies of these three strategic goals are described in greater detail below.

STRATEGIC PLAN IMPLEMENTATION

Upon authorization from the OCII Commission, OCII staff will, in furtherance of the Legacy Foundation's Strategic Plan, utilize a Notice of Funding Availability ("NOFA") or Request for Proposals ("RFP") framework to seek out qualified organizations to administer programs and funds described in the Strategic Plan. Each notice or request will require detail regarding the organization's expertise and experience, strategies with a time-line and budget, and contain conditions of accountability to achieve the priorities adopted by the Legacy Foundation. In accordance with OCII's procurement policies, the OCII Commission will receive informational memorandums before staff publishes a NOFA or RFP, and the OCII Commission will approve any awards over \$50,000.

The RFP or NOFA announcement will generally require a 30-45-day process to search for service providers or consultants qualified to perform the services required to implement the Strategic Plan. The Legacy Foundation Board will present its expectations for the program, inform potential proposers of the Board's expectations, and define the project goal of the program. In turn, proposers will submit responses detailing how they will design and carry out the program.

Specifically, the RFP or NOFA will describe the type of services required, as well as desired outcomes, and request responses from qualified proposers that lay out a comprehensive plan to perform the services, designated staff persons, and a detailed budget. If needed, proposers will be invited to participate in a formal interview to allow an interview panel (typically comprised of 3-5 people, with Legacy Foundation board members being a majority) an opportunity to ask specific questions regarding the service provider's experience and to understand the service provider's qualifications and capabilities to perform the services requested. The panel will then make a recommendation to the full Legacy Board for the proposer deemed most qualified. The Legacy Board will then move forward with taking the recommendation to the OCII Commission. The RFP or NOFA will be advertised in local newspapers, business publications (both print and online), on the City's website, on OCII's website, as well as in various other media forums to widely circulate and publicize the opportunity.

SUMMARY OF STRATEGIC PLAN - PHASE 1 FUNDS:

The table below provides a summary of the Legacy Foundation's plan to allocate funds and accomplish their neighborhood investment goals in Phase 1.

STATUS	AMOUNT	NOTES
Original Fund Amount	\$1,000,000	Community Benefits Fund Advance services. ¹¹
Expenditures to Date	- \$30,685	Strategic Plan Research and Consulting
Amount Remaining	\$969,315	

The Legacy Foundation Strategic Plan proposes programming for the next 5 years as follows:

ITEM	PHASE 1 FUNDS - PROGRAMS	PROPOSED ANNUAL BUDGET	TOTAL BUDGET (2016 – 2021)
NEIGHBORHOOD BUILDING			
1.	Community Dialogues	\$ 8,000/year for 3 years	\$ 24,000
2.	Recognition of Community Heroes	\$ 5,000/year for 3 years	\$ 15,000
	Neighborhood Building Subtotal:		\$ 39,000
EDUCATION & WORKFORCE			
1.	College Readiness and Career Skill Building	\$ 80,000/year for 5	\$ 400,000
2.	Scholarship Administration	\$ 4,500/year for 5 years	\$ 22,500
3.	College Living Expense Stipends	\$ 10,000/year for 5	\$ 50,000
4.	Construction/Contractor Assistance	\$ 250,000/year for 1	\$ 250,000
5.	Hacker Hub	\$ 25,000/year for 1 year	\$ 25,000
	Education & Workforce Subtotal:		\$747,500
HOMEOWNERSHIP			
1.	Homeownership Down Payment Assistance	\$ 180,000/over 5 years	\$ 180,000
	Homeownership Subtotal:		\$ 180,000
	PHASE 1 FUNDS TOTAL	\$ 442,500 per year	\$ 966,500

¹¹ Provided by Phase 1 Developer on December 2, 2013.

SUMMARY OF STRATEGIC PLAN - PHASE 2 FUNDS:

The table below provides a summary of the Legacy Foundation's plan to invest Phase 2 funds into education through scholarship and travel opportunities to improve the lives of BVHP students.

STATUS	AMOUNT	NOTES
Original Fund Amount	\$ 500,000	Lennar Bayview Scholarship Fund services. ¹²
Expenditures to Date	- \$0	
Amount Remaining	\$ 500,000	

The Legacy Foundation Strategic Plan proposes programming for the next 5 years as follows:

ITEM	PHASE 1 FUNDS - PROGRAMS	PROPOSED ANNUAL BUDGET	TOTAL BUDGET (2016 – 2021)
1.	Legacy Bayview Lennar	\$ 95,000/year	\$ 475,000
2.	Legacy Will Bass Memorial Travel Abroad Scholarship	\$ 5,000/year for 5 years	\$ 25,000
	PHASE 2 FUNDS TOTAL	\$ 100,000/year for 5 years	\$ 500,000

¹² Provided by Phase 2 Developer on March 1, 2014, after approval of first Major Phase in Phase 2.

NEIGHBORHOOD BUILDING

Neighborhood Building		
Source of Funds	Program	Amount
Phase 1	Community Dialogues	\$ 24,000 over 5 years
Phase 1	Recognizing Community Heroes	\$ 15,000 over 5 years
Total		\$39,000 over 5 years

Neighborhood Building Priorities:

- 1) Increasing community knowledge of innovations and trends that can positively affect community well-being in Bayview Hunters Point.
- 2) Lifting up solutions and innovations spearheaded by individuals in the Bayview Hunters Point that are positively impacting community life and mitigating suffering among the most vulnerable in the Bayview.

Neighborhood Building Program Strategies:

In response to the challenges facing Bayview Hunters Point and the many unsung talented residents and community leaders who recognize these challenges as life callings to pursue, the Legacy Foundation will pursue two Neighborhood Building Strategies:

- 1) Community Dialogues
- 2) Recognition of Community Heroes

1) COMMUNITY DIALOGUES

Program Description

Organize periodic Community Dialogues that bring together cutting edge thinkers, innovators, and funders with local change agents (i.e. community leaders, elected officials, business owners, and engaged citizens) to expand the consideration of ideas and solutions. To every extent possible, the Legacy Foundation will partner with stakeholders from the community to develop the following to support the Community Dialogues as a neighborhood building opportunity:

- Themes
- Agenda and desired outcomes
- Outreach (including marketing, invitations and participant recruitment)
- Event logistics

Implementation

Community Dialogues will be held every other year, starting in the first year of the Strategic Plan (2017); near the mid-point (2019) and in the final year of the plan (2021).

Per the OCII procurement procedures, the Legacy Foundation will solicit a minimum of three (3) quotes from qualified small businesses to provide the organizational and planning services required for the Community Dialogues event.

2) RECOGNITION OF COMMUNITY HEROES

Program Description

The Community Dialogues, or a comparable event, will serve as the venue to recognize and award recipients of Legacy Foundation's second neighborhood building strategy: Community Legacy Awards. The individual value of each Community Legacy Award Recipient will be recognized for their steadfast dedication and contributions to the Bayview Hunters Point community. Awards will be given at each event to be held in 2017, 2019, and 2021.

The Legacy Foundation will recognize Community Heroes who are nominated through a community process and selected for their individual or group contributions, leadership, and exemplary efforts in creating life changing improvements that aid in strengthening of the Bayview Hunters Point Community.

Implementation

The Legacy Foundation will model its selection process similar to programs such as the United Way Community Heroes and will seek the assistance of organization like Bayview Mobilization for Adolescent Growth in our Communities ("BMAGIC"), an initiative sponsored by the San Francisco Public Defender's Office, and other established organizations or non-profits, to help design a criteria-based nomination process. It is currently envisioned that nominations will come from individuals, faith groups, businesses, and community based organizations and include a rationale for said nomination. The Community Prize criteria will focus on recognizing "unsung" leaders who have demonstrated passion and commitment that translates into meaningful innovations in the Bayview Hunters Point community.

Education and Workforce Improvement

Education & Workforce Improvement		
Source of Funds	Program	Amount
Phase 1	College Readiness & Career Skill Building Grants	\$ 400,000 over 5 years
Phase 1	Scholarship Administration	\$22,500 over 5 years
Phase 1	College Living Expense Stipends	\$ 50,000 over 5 years
Phase 1	Contractor Assistance Program	\$ 250,000 over 1 years
Phase 1 Subtotal		\$ 722,500 over 5 years
Phase 2	Lennar BVHP Scholarship Program	\$475,000 over 5 years
Phase 2	Will Bass Memorial Travel Abroad Scholarship	\$ 25,000 over 5 years
Phase 2 Subtotal		\$ 500,000 over 5 years
Phase 1 and Phase 2 Total		\$ 1,222,500

The Legacy Foundation firmly believes that a well-educated, highly skilled workforce may be the most important ingredient in strengthening the economy and ensuring a higher quality of life in Bayview Hunters Point. Equitable education not only builds a skilled workforce, it also provides social, civic, and personal development. Unequal access to quality education contributes to achievement gaps across racial, ethnic, and economic lines and to the decline of student achievement. Creating skilled workers for an economy that is quickly changing will require strategic investments and better education and workforce development programs.

Today, more than 53% of the residents residing in neighborhoods similar to Bayview Hunters Point, who are over the age of 25, have a high school diploma or less; and about 25% have some college experience or an associate's degree. Approximately 18% of residents have obtained a bachelor's degree or higher; compared to roughly 43.9% for other areas in the surrounding city. In an effort to increase the number of post-secondary degree holders in Bayview Hunters Point the Legacy Foundation will provide competitive criteria-based scholarships.¹³

The two types of scholarships available to eligible Bayview students include:

- (1) The Lennar Bayview Scholarship Fund, which will assist students to attend and graduate from accredited higher education institutions; and
- (2) The Legacy Will Bass Memorial Education Travel Scholarship, an annual travel scholarship providing an opportunity for one student to travel to Africa or Asia.

Investing in a skilled workforce and increasing access to college are high priorities for the Legacy Foundation; because the majority of jobs in the San Francisco Bay Area will continue to require more than a high school diploma, education beyond high school is increasingly essential.

¹³ Campaign for College Opportunity "May 2015 | The State of Higher Education in California: Black Report"

EDUCATION AND WORKFORCE PRIORITIES:

- 1) Increase the rate of access by middle through high school age youth and young adults in building competency in executive functions and Science, Technology, Engineering, Art, and Math (“STEAM”) skills.
- 2) Increase improvements in grade point average (“GPA”) and test scores in math and reading and student attendance rates at middle and high schools.
- 3) Increase the high school graduation rates among public school students.
- 4) Increase the acceptance and completion rates among youth and young adult students in college/university and accredited vocational skills-building institutions.
- 5) Increase the awareness of career choices that lead to livable wages and sustainable careers in high growth employment sectors.
- 6) Increase the number of residents employed in growth sectors.
- 7) Increase the number of college-age Bayview Hunters Point students who successfully complete study abroad opportunities in Africa and Asia.

Education and Workforce Program Strategies

The Legacy Foundation has determined that strengthening young people’s academic achievements and skills will increase employability, a critical building block to eradicating poverty in Bayview Hunters Point. The Legacy Foundation has committed to providing resources to this priority on a multi-year basis through the following program strategies:

- 1) College Readiness & Career Skill Building Grants
- 2) Tuition Assistance Scholarships
- 3) Travel Scholarships to Asia and African
- 4) Contractor Assistance Program

1) COLLEGE READINESS & CAREER SKILL BUILDING GRANTS

Program Description

College Readiness & Career Skill Building grants will be made available to non-profit community based organizations that serve Bayview Hunters Point youth.

The Legacy Foundation seeks to support non-profit community based organizations (this definition includes non-profit social enterprises, college and university-sponsored projects) that offer out-of-school time programs which may include project-based learning opportunities that are assisted by tutoring, mentorships, internships and instructional curriculum that is focused on building Science, Technology, Engineering, Arts and Math and executive functions skills.

Specifically, the Legacy Foundation seeks to support 100 Bayview Hunters Point youth each year, for five years, through non-profit community based organizations that provide assistance to struggling, resilient youth (age 11 to 18 years) and young adults (age 19 to 25 years) that either:

- 1) Reside in Bayview Hunters Point; or

- 2) Attend public middle or high schools in Bayview Hunters Point.

Grantees will be required to track and provide annual reports regarding the number of clients served and improvements in skills as a condition of funding.

Implementation

Utilizing a Request for Proposals (“RFP”) framework, the Legacy Foundation will establish and oversee the grant making and management processes to award approximately \$80,000 in program grants to non-profit community based organizations annually, with a minimum of two-year cycles, to expand the capacity of these programs. Two RFP rounds are anticipated. The first round will be for a two-year period (2017 to 2019), and the second round (2019 to 2021).

Organizations will be asked to provide proposals and demonstrate their ability to successfully administer the following targeted programs and/or services to support at least 100 youth and young adults per year. Organizations will be asked to demonstrate their ability to assist students to:

- 1) Meet California A through G high school completion standards for graduation and/or upgraded General Education Development (“GED”) requirements and Common Core Standards established for middle to high school in STEAM fields.
- 2) Build executive-function, capacity-building skills (i.e. support in self-regulating emotions, ability to initiate and effectively adapt, stay on task through completion, self-organizing and the ability to organize others).
- 3) Create and strengthen relationships with adults and peers that are strength-based and confidence building in supporting the personal leadership of the youth and young adult and their ability to pursue sustainable employment and higher education.
- 4) Access technical assistance in completing applications for acceptance to college, university, and/or accredited vocational training programs providing training in skills demanded by high growth sectors.
- 5) Access workforce training and placement in high demand growth sectors.

In the course of preparing this Strategic Plan, the following programs were examined and found to have the program components desired by the Legacy Foundation: OldSkool Café, Success Center San Francisco, Visions of La Moda, UCSF’s High School Internship Program, YMCA – Bayview Hunters Point, Bayview Center for Art and Technology, Bay Area Video Coalition, MissionBits.Com, City College of San Francisco Health Education Department Community Mental Health Certificate Program, College Track, Bayview Association for Youth – 100% College Prep Institute, Hunters Point Family Foundation– Girls 2000, Urban Ed Academy, and Omega Boys Club. These groups do not represent the totality of programs to be invited to apply for support.

2) SCHOLARSHIP AND TUITION ASSISTANCE RESOURCES

Program Description

The Legacy Foundation's mission is to mobilize, through the Lennar Bayview Scholarship Fund, scholarships and educational support to make postsecondary education possible for all Bayview Hunters Point students, up to the age of 30, who wish to attend college. Our vision is to be leaders in providing scholarships and other financial support to students residing in the 94124 zip-code or BVHP community, to make the completion of education beyond high school a reality for all. Reducing the financial barriers that would otherwise prevent or inhibit qualified students from attending college will be a major focus of the Foundation.

Implementation

Utilizing a RFP or NOFA framework, the Legacy Foundation will partner with an established organization or company that will manage and administer the scholarship and tuition assistance programs, making available approximately \$475,000 in scholarships and tuition assistance grants over a five year period. The scholarships and tuition assistance grants will be awarded on an annual basis. Two RFP rounds are anticipated. The first round will be for a two-year period (2017 to 2019), and the second round (2019 to 2021).

3) THE WILL BASS MEMORIAL EDUCATIONAL SCHOLARSHIP FOR STUDY ABROAD

Program Description

The scholarship fund will be set up as a multi-year pledge (maximum annual installments of \$5,000) for educational Travel to Africa or Asia. It is anticipated that the funds will be marketed to eligible 94124 students to participate in existing college or university travel abroad programs.

Implementation

The Legacy Foundation will make annual grants of \$5,000 to the designated travel program during the period covered by this Strategic Plan to underwrite the scholarship. All proceeds will be awarded to the selected students. The Legacy Foundation may partner with one or multiple organizations over a five-year period to administer this annual scholarship.

4) WORKFORCE - CONTRACTOR ASSISTANCE AND MOBILIZATION

Program Description

In addition to educational program investments and skill building, the Legacy Foundation strongly supports investment in small local businesses and contractors that are committed to creating immediate work opportunities for local BVHP workers. The Contractor Mobilization Fund program will ensure full opportunities for participation by small contractors in projects involving high value contracts. The program will also provide contractors with guidance through the process for bidding and local hiring goals by providing one-on-one consultations and contractor-focused group workshops and seminars.

Implementation

The Legacy Foundation will partner with an existing service provider to support and strengthen the current contractor's mobilization fund for small contractors performing work in Bayview.

5) HACKER HUB

Program Description

The Legacy Foundation strongly supports providing opportunities for Bayview Hunters Point residents in the technology sector. The Hacker Hub create early opportunities for young residents to enter the STEM (Science, Technology, Engineering, Mathematics) workforce development pipeline, attracting girls and boys of color at an early age to STEM education and potential careers in computer coding and other technology fields.

Implementation

Utilizing a RFP or Notice of Funding Availability (“NOFA”) framework, the Legacy Foundation will partner with an established organization or company that will provide services that support BVHP Youth in exploring opportunities in the technology sector. One RFP round is anticipated in late 2017.

HOMEOWNERSHIP DOWN PAYMENT ASSISTANCE

Homeownership Assistance Grants		
Source of Funds	Program	Amount
Phase 1	Homeownership Assistance Grants	\$ 180,000 over 5 years
Total		\$ 180,000

Successful homeownership is critical not only to the long-term prosperity of homeowners but also to the Bayview Hunters Point community itself. The housing and financial crises of the last several years have highlighted the need for promoting and supporting successful homeownership.

The Legacy Foundation Down Payment Assistance Fund will provide down payment assistance in the form of equity contributions that support residents in 94124, who meet the eligibility criteria and who are committed to purchasing and living in a home in 94124. To qualify for grant assistance, interested residents will be required to participate in and complete housing counseling and education programs as established and prescribed by the Legacy Foundation’s homeownership assistance partner or financial empowerment intermediary partner. Prior to accessing the grant from the Legacy Down Payment Assistance Fund, the resident must be pre-qualified by a mortgage lender or through the selected partner agency.

PROMOTE AND SUPPORT SUCCESSFUL HOMEOWNERSHIP AND ACCESSIBLE HOMEBUYER FINANCING

Program Description

The Legacy Foundation will seek out community partners whose support services align with the Foundation’s goals to increase homeownership for low- and moderate-income Bayview Hunters Point households. The primary focus will be comprehensive homebuyer/homeowner support, including outreach, education, and counseling services; and promoting affordable and accessible homebuyer financing, including first mortgages and entry cost assistance, for qualifying low and moderate-income Bayview Hunters Point residents.

Implementation

Utilizing the RFP or NOFA framework, the Legacy Foundation will partner with a BVHP organization experienced in providing homeownership assistance and access to financial assistance for qualifying BVHP residents looking to purchase homes in the BVHP. The Legacy Board will work with the organization to help design program requirements and qualifications.