



118-2202024-002

Agenda Item **No. 8(b)**
Meeting of May 21, 2024

INFORMATIONAL MEMORANDUM

TO: Commission on Community Investment and Infrastructure

FROM: Thor Kaslofsky, Executive Director

SUBJECT: Evaluation panel recommendation of a team led by Curtis Development to develop, own, and operate affordable housing mixed use projects on Mission Bay South Block 4 East; Mission Bay South Redevelopment Project Area

Through a Request for Qualifications (“RFQ”) process, OCII recently offered Mission Bay South Block 4 East (“Block 4E”), an Affordable Housing Parcel within the Mission Bay South Redevelopment Project Area (“Project Area”), for affordable housing development. Block 4E is an approximately 45,655 square foot rectangular site bounded by Mission Rock Street to the north, 3rd Street to the east, China Basin Street to the south, and a residential development fronting 4th Street to the west on Block 4 West.

OCII released the RFQ to the development community in November 2023 and received four responses in January 2024. Staff convened an interdisciplinary evaluation panel in February 2024, and based on the results of the panel, staff recommends the selection of the applicant team comprised of (the “Developer” or “Curtis and BSS”):

- Curtis Development as Lead Developer,
- Bayview Senior Services as Co-Developer and Services Provider,
- Y.A. studio as Lead Architect,
- The John Stewart Company as Property Manager, and
- Davis & Associates Communications, Inc. as workforce and contracting representative.

Staff anticipates returning to the Commission in summer 2024 to request authorization to enter into an exclusive negotiations agreement (“ENA”) and predevelopment loan agreement (“Predevelopment Loan”) with the Developer consistent with the funding estimates included in ROPS 23-24 line item number 436.’

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BACKGROUND

Project Area Background

The Mission Bay South Project Area (“Project Area”) was established in 1998 with San Francisco Redevelopment Agency Commission and San Francisco Board of Supervisors approval of the Mission Bay South Redevelopment Plan (“Redevelopment Plan”) and Owner Participation Agreement (“OPA”). Both the Redevelopment Plan and OPA have since been amended.

The Redevelopment Plan authorizes approximately 3,550 residential units to be constructed in the Project Area. Under the OPA, certain sites were pre-selected for the development of OCII-sponsored affordable housing (“Affordable Housing Parcels”). Affordable Housing Parcels comprise approximately 12 acres and are distributed throughout the Project Area. The OPA establishes that up to 1,218 units may be developed on these sites. To date, 905 units have been completed on Affordable Housing Parcels (including affordable units and manager’s units), and another 148 are under construction (on Block 9a), for a total of 1,053 units.

Development on the remaining Affordable Housing Parcels, which consist of Block 4E (the subject of the RFQ) and Block 12 West, is currently limited to 165 units (1,218 units authorized under the OPA less 1,053 units complete or in progress). As previously presented to the Commission, OCII may consider pursuing an OPA amendment and, if necessary, a Redevelopment Plan amendment, to increase the allowable number of units and fully build out projects at the remaining Affordable Housing Parcels.

DISCUSSION

RFQ Summary

Following an informational memorandum to the Commission on November 7, 2023, OCII released an RFQ on November 9, 2023, seeking a team to develop, own and operate affordable rental housing units, including units set aside for households experiencing homelessness on Block 4E. Notification of the RFQ was provided to community groups, developers, architects, property management companies, supportive service providers, contractors and other community stakeholders through OCII Citizens Advisory Committee (“CAC”) and Small Business Enterprise (“SBE”) email lists, and lists from the Mayor’s Office of Housing and Community Development (“MOHCD”) and Department of Homelessness and Supportive Housing (“HSH”). The RFQ was also posted on OCII and City websites.

The RFQ sought submittals from qualified teams comprised of a lead non-profit or for-profit developer (“Lead Developer”), a non-profit co-developer (“the “Co-Developer”, the Lead Developer and Co-Developer together are the “Developers”), property manager, supportive services provider, and an architect. Applicants were also asked to identify a responsible party for implementing a Workforce and Contracting Action Plan (“WCAP”), either a representative from one of the Developer organizations, or an outside consultant. All other consultants will be selected in accordance with the OCII’s SBE Policy (as further discussed below).

Block 4 East Development Program/Requirements

The RFQ asked that applicant teams submit qualifications to demonstrate the ability to produce a high-quality affordable housing project that maximizes affordable housing opportunities, provides high quality living environments, and specifically seeks to meet the housing needs of persons displaced by prior redevelopment action and their descendants (“Preference Holders”). The RFQ described the following preliminary development program for Block 4E:

Block 4 East Development Program Summary	
Target population	• Preference Holders • Low-income families • Approx. 20% of units designated for households experiencing homelessness
Number and type of units	Up to 165* high quality units with a target mix of: • 25% one-bedroom • 50% two-bedroom • 25% three-bedroom
Area Median Income (“AMI”) and rent restrictions	Tiered income levels targeted to meet the needs of preference populations, including Preference Holders, at up to 80% MOHCD AMI, provided that the average AMI for all affordable units is at or below 60% AMI in accordance with the Mission Bay Housing Policy
Commercial	Ground floor space for community or neighborhood serving commercial use
Parking	Vehicle: provide resident parking to the extent financially feasible Bicycle: Class I bicycle parking spaces at a target ratio of 1 space for every 2 units

** As noted in the background section above, OCII is limited to 165 units under the OPA. OCII’s development authority may be expanded, and the number of affordable units on Block 4E may be increased and the site may be developed in one or more buildings and/or phases.*

Applicant teams were required to provide a qualifications submittal package that clearly articulated their vision for the Project, approach to key aspects of development, described the roles and responsibilities of team members, and highlighted the relevant experience and capacity of each Applicant team member.

Applicant Teams

OCII received four (4) submittals, all of which met the minimum threshold for completeness. The submittals are as follows (in alphabetical order):

- Curtis Development as lead developer and Bayview Senior Services as co-developer
 - Architect: Y.A. studio
 - Property Manager: The John Stewart Company (“JSCo”)
 - Services Provider: BSS
 - Workforce Representative: Davis & Associates Communications, Inc.

- Mercy Housing California (“MHC”) as lead developer with Booker T. Washington Community Service Center (“BTWCSC”) as co-developer; and Tenderloin Neighborhood Development Corporation (“TNDC”) as lead developer with Young Community Developers (“YCD”) as co-developer
 - Architect: Kennerly Architecture & Planning, Inc.
 - Property Manager: TNDC and MHC
 - Services Provider: TNDC and MHC
 - Workforce Representative: Monte Wilson and YCD
- Related California (“Related”) as lead developer and Bernal Heights Neighborhood Center (“BHNC”) as co-developer
 - Architect: Mithun
 - Property Manager: Related Management Company
 - Services Provider: Lutheran Social Services
 - Workforce Representative: TBD, intended to procure if selected
- San Francisco Housing Development Corporation (“SFHDC”) as lead developer and MidPen as co-developer
 - Architect: David Baker Architects
 - Property Manager: MidPen Property Management Corporation
 - Services Provider: SFHDC and MidPen Resident Services Corporation
 - Workforce Representative: SFHDC, potential for consultant support

All four (4) teams were interviewed by the evaluation panel on February 21, 2024.

Evaluation Process and Criteria

The qualifications applications were reviewed by each member of the evaluation panel in advance of the Applicant interviews, which were held on February 21, 2024. The 8-person evaluation panel consisted of representatives from the Mission Bay CAC, MOHCD, HSH, the OCII housing team, the OCII Mission Bay Project Area management team, and the OCII planning and design review team. OCII contract compliance team participation also ensured compliance with this RFQ’s procedural guidelines and provided analysis of the WCAP sections of each submittal.

Evaluation criteria emphasized OCII’s expectations regarding diversity and racial equity in all aspects of the Project, engagement with Preference Holders throughout the Project’s development with the goal of successfully housing as many Preference Holders as possible, a thoughtful approach to SBE participation, and the ability to secure financing to deliver the Project on an expedited development schedule. Qualifications were evaluated using the scoring matrix set forth in the RFQ, summarized as follows:

Maximum Points	Criteria
30	Development Vision
10	Development approach:
5	Design approach
5	Property management approach
5	Supportive services approach
5	Marketing approach
70	Team Experience and Capacity
10	Applicant team composition and structure
10	Lead Developer experience and capacity
10	Co-Developer experience and capacity
10	Architect experience and capacity
10	Equal Opportunity Program/Workforce and Contracting Action Plan
10	Services provider experience and capacity
10	Property Manager experience and capacity
100	Total Points

Scoring Results

Based on scoring, the evaluation panel recommended the applicant team led by Curtis and BSS. Scoring for each of the submittals is as follows (in alphabetical order):

Applicant Team	Total Score	Average Score
Curtis/BSS	622	78
MHC/BTWCSC/TNDC/YCD	581	73
Related/BHNC	544	68
SFHDC/MidPen	532	67

The Curtis/BSS proposal strengths include:

- **Vision/Concept:** The team's vision for Block 4 East emphasized a vibrant, multi-generational community in a "village" concept with an approach rooted in responsiveness to the Preference Holder community. Design will prioritize resident well-being through thoughtful amenities that enhance livability and facilitate connections. Features and open spaces will include elements intended to serve residents of a wide variety of ages and interests.
- **Developer Partnership:** The proposed partnership has a 75%/25% ownership split (Curtis at 75% and BSS at 25%). Curtis and BSS will form a limited partnership to function as the development and ownership entity wherein BSS will function as the Managing General Partner and Curtis will function as the Administrative General Partner. Both Developers will be bringing on additional staff to build capacity to support the focused and efficient development of Block 4E. Curtis will lead day-to-day predevelopment and development, prepare financial applications and oversee workforce, Equal Opportunity Programs and Workforce and Contracting Action Plan compliance. BSS will lead outreach for any necessary entitlement activities, identify and locate Preference Holders, lead Preference Holder engagement, oversee prospective household readiness, provide project-wide resident services, and will collaborate with JSCo on marketing and lease-up.
- **Developer Experience:** Curtis possesses extensive experience in developing affordable housing projects with notable recent projects including 921 Howard Street, 203 affordable rental units, with TNDC, and 400 China Basin Condominiums, 148 affordable homeownership units, with Michael Simmons Property Development. Overall, Curtis has developed over 20 infill projects, 14 of which are located in San Francisco. BSS has executed successful partnerships with many for-profit developers such as McCormack Baron Salazar, L+M Development, Jonathan Rose Companies and The John Stewart Company, and is the Managing General Partner on four developments, including providing supportive services in 5 completed projects with two more in development.
- **Financing Plan and Expedited Schedule:** The qualifications submittal emphasized feasibility and outlined an expedited schedule while maintaining appropriate levels of community engagement. Curtis brings extensive experience and knowledge of public funding sources and how to successfully apply for competitive public financing. The submittal emphasized Curtis' ability to manage design to a budget and control costs while preserving high-quality design and resident experience equivalent with market-rate standards, for example, through the use of cost-saving elements such as pre-cast finish elements, modular bathrooms, and mirrored floor plans across the site.
- **Diversity, Equity and Inclusion:** The team is diverse with a demonstrated commitment to creating meaningful opportunities for people of color both in their respective organizations and in housing. Curtis, BSS, Y.A. studio, and Davis & Associates are BIPOC-led organizations. Curtis intends on hiring a staff member and an intern to support the development of Block 4E,

and BSS hires from the Bayview Community and is committed to hiring housing staff to build long-term development capacity. Y.A. studio demonstrated a commitment to mentorship and training opportunities for employment, and growth into a lead architect role.

- **Architectural Experience:** Y.A. studio is an award-winning firm that has served as associate architect on a number of OCII and MOHCD projects, including Mission Bay South Blocks 9 and 9A and Transbay Block 8. With experience with OCII project areas and design review procedures, they are well prepared to collaborate with OCII on massing concepts that maximize the site's potential, complement surrounding architecture, address the Mission Bay South Design for Development guidelines, and are financially feasible.
- **Preference Holder Outreach:** Curtis and BSS demonstrated a thorough understanding of the Preference Program and its history. BSS has a track record of success in identifying and housing Preference Holders. BSS is committed to building relationships with Preference Holder households and maintains an in-house Preference Holders database. The Developers will engage Preference Holders throughout the development process to identify and address needs and ensure that the built project is desirable and welcoming.
- **Workforce and Contracting Action Plan:** The submittal included detailed WCAP that outlines strategies to meet or exceed OCII's workforce and contracting goals and programs. Davis & Associates, Inc. has extensive experience engaging with SBE contractors and professional service firms and proposed providing a robust outreach and implementation strategy that focused on outreach and communication, building upon new and existing relationships with local organizations, identifying and addressing barriers to SBE participation, and thoughtfully identifying opportunities to unbundle scope to maximize opportunities.

In addition to scoring pursuant to the matrix described above, staff considered the requirement in the Mission Bay Affordable Housing Policy (adopted by the San Francisco Redevelopment Agency Commission on September 17, 1998 (Resolution No. 194-98)) that preference be given to non-profit housing development corporations headquartered in San Francisco. Applicants that include a Lead Developer who is a for-profit entity must establish that the activities and purpose of the Lead Developer's partnership with the non-profit Co-Developer is primarily to construct and develop affordable housing units in furtherance of the non-profit organizations' purposes and only incidentally to further the for-profit purposes of the for-profit entity, in accordance with the definition of "Qualified Housing Developer" in Attachment C of the Mission Bay South OPA.

While Curtis, a SF-based woman and minority-owned SBE, is not a non-profit organization, staff determined that the team met the requirement to be considered a Qualified Housing Developer. The purpose and activities under the Curtis/BSS partnership is for the sole purpose of developing affordable housing units. As noted above, BSS, a San Francisco-based non-profit organization will be the managing general partner of the organization established for housing development on Block 4E.

CONTRACTING AND WORKFORCE HIRES

The selected team will be required to perform extensive good faith efforts to include SBEs in the performance of any agreement resulting from the RFQ and any subsequent agreements between the development team and its contractors or consultants as required by OCII's SBE Policy, with the goal of achieving at least 50% SBE participation with first consideration to local firms . The team 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 goal of 50% for San Francisco residents.

In addition, the selected team will be expected to create a meaningful associate architect opportunity for a San Francisco-based SBE, even though the primary architect is a SF-based minority-owned SBE. The selected general contractor will 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.

COMMUNITY OUTREACH

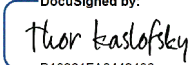
Staff informed the Mission Bay community of its intent to issue an RFQ through engagement with the CAC. The CAC has been provided with regular updates, including a presentation outlining the RFQ in September 2023. The recommended development team also presented to the CAC at its May 9, 2024 meeting. In addition, staff discussed the RFQ at the September 2023 meeting of the Council of Community Housing Organizations, a nonprofit coalition of community-based housing developers.

Staff and the development team will continue outreach to the community through the CAC throughout the development process.

NEXT STEPS

In summer 2024 staff will request the Commission's authorization for a Predevelopment Loan and ENA.

(Originated by Phillip C. Wong, Development Specialist)

DocuSigned by:

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Thor Kaslofsky
Executive Director

Attachment A: Mission Bay South Project Area Map
Attachment B: Mission Bay South Block 4 East Request for Qualifications

Attachment A: Mission Bay Map



LEGEND:

- Public Facility
- Parks
- Residential / Market Rate
- Residential / Affordable
- Hotel
- UCSF
- UCSF Commercial

MISSION BAY

LAND USE MAP

December 2019



0 200 800
100 400



Housing Development

Request for Qualifications

**To develop, own and operate affordable rental housing units,
including units set aside for households experiencing homelessness
at:**

Mission Bay South Block 4 East

**(located between Mission Rock Street, China Basin Street, 3rd Street,
and Block 4 West)**

Block 8711, Lot 029

Mission Bay South Redevelopment Project Area

**Deadline for Submission
4:00 p.m. – January 19, 2024**

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



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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 qualifications from eligible applicants to develop, own, and operate affordable rental housing that serves low-income families and households experiencing homelessness on Mission Bay South Block 4 East in the Mission Bay South 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 developer that meets the definition of Qualified Housing Developer under the Mission Bay South Housing Program of the Mission Bay South Owner Participation Agreement (“Lead Developer”);
- A non-profit co-developer (the “Co-Developer”, the Lead Developer and Co-Developer together are the “Developers”);
- A property manager (the “Property Manager”);
- A supportive services provider (the “Supportive Services Provider”); and
- A lead architect (the “Architect”).

As required by the Mission Bay Affordable Housing Policy, adopted by the San Francisco Redevelopment Agency Commission on September 17, 1998 (Resolution No. 194-98), preference will be given to non-profit housing development corporations headquartered in San Francisco. Applicants that include a Lead Developer who is a for-profit entity must establish that the activities and purpose of the Lead Developer’s partnership with the non-profit Co-Developer is primarily to construct and develop affordable housing units in furtherance of the non-profit organizations’ purposes and only incidentally to further the for-profit purposes of the for-profit entity, in accordance with the definition of “Qualified Housing Developer” in Attachment C of the Mission Bay South Owner Participation Agreement. **The selected Applicant will be required to select its other consultants and contractors in accordance with the OCII’s Small Business Enterprise (“SBE”) Program.**

The subject property of this Request for Qualifications (“RFQ”) is Assessor’s Parcel Number 8711/029 (Mission Bay South Block 4 East), which is an approximately 45,655 square-foot rectangular site bounded by Mission Rock Street to the north, 3rd Street to the east, China Basin Street to the south, and an existing development, Strata at Mission Bay Apartments, to the west (“Block 4E” or the “Site”). The Site dimensions are approximately 275 feet along 3rd Street, and approximately 166 feet along China Basin and Mission Rock Streets.

A summary of the programming anticipated for the Site is provided in the table below. As further discussed herein, creating housing opportunities for persons displaced by SFRA action and their descendants, “Preference Holders”) is OCII’s highest priority in determining the development program. The selected Applicant will be expected to meaningfully engage with Preference Holders and optimize program elements, to the extent feasible, to facilitate Preference Holder occupancy. Additional information regarding project elements and design standards can be found in Section III Development Program in this RFQ.

Block 4E Program Summary	
Target population	Preference Holders, especially those displaced by SFRA, low-income families, with approximately 20% of units designated for households experiencing homelessness
Number of units	Up to 165*
Unit types	Family units with a target mix of: • 25% one-bedroom • 50% two-bedrooms • 25% three-bedrooms
Area median income (AMI) and rent restrictions	Tiered income levels targeted to meet the needs of Preference Holders, at up to 80% MOHCD AMI, provided that the average AMI of all affordable units is at or below 60% AMI in accordance with the Mission Bay Housing Policy further described in Section II.A.3.

Commercial	Ground floor space for community or neighborhood serving commercial use(s)
Parking	• Vehicle: provide resident parking to the extent financially feasible • Bicycle: Class I bicycle parking spaces at a target ratio of 1 space for every 2 units

** As further described herein, OCII's development authority is limited to 165 units. OCII is amenable to pursuing additional affordable units on one or more buildings on Block 4E pending requisite approvals to increase OCII authority.*

Block 4E is part of the 238-acre Mission Bay South redevelopment 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 §§34170 et seq (the "Redevelopment Dissolution Law"). OCII is the Successor Agency to the SFRA and is responsible for implementing SFRA's enforceable obligations. On January 24, 2014, the California Department of Finance determined "finally and conclusively" that the Mission Bay South Owner Participation Agreement by and between the former SFRA and Catellus Development Corporation, as amended ("OPA"), its Housing Program (Attachment C to the OPA), and tax allocation pledge agreement are enforceable obligations under Redevelopment Dissolution Law. Furthermore, state law recognizes that the amount of affordable housing authorized under the OPA is an enforceable obligation for which OCII may use tax increment financing as provided under the Redevelopment Dissolution Law (California Health and Safety Code §34177.7).

The Redevelopment Plan and related documents continue to govern the development of the Project Area. OCII will select the development team and issue all project approvals for Block 4E. Upon completion of the Project, OCII's 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 review and comment on the Project's financial underwriting and funding, and disposition documents to ensure a smooth transition to MOHCD after completion.

The OPA Housing Program designates sites for the development of OCII-sponsored affordable housing projects and establishes a maximum number of affordable units (1,218) that may be developed. The SFRA and OCII have developed most of the affordable units and OCII only has authorization to develop the remaining balance of 165 units. However, in furtherance of Citywide housing production goals and in acknowledgement that there may be capacity for additional affordable units on Block 4E and on other Mission Bay Sites, OCII may pursue amendments to the OPA and the Redevelopment Plan, if necessary, to increase the allowable number of units on Block 4E. Any such amendments would be subject to the consent of FOCIL-MB LLC (successor in interest to Catellus Development Corporation and "Master Developer"). **Applicants are advised that OCII reserves the right to modify the development program on Block 4E. Modifications may include, but are not limited to, an increase in the number of affordable units, and the delivery of additional units in more than one distinct building and phase. Prospective Applicants should prepare to be flexible and collaborative in working with OCII to establish a program that maximizes the delivery of high-quality affordable housing units on the Site with the specific goal of maximizing housing opportunities for Preference Holders.**

The Redevelopment Plan is subject to a 30-year term and will expire in 2028. Thus, time is of the essence in developing the Project. Applicants should carefully consider their capacity to devote sufficient resources to the Project to meet an expedited development schedule prior to submitting qualifications.

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 Mission Bay Citizens Advisory Committee ("CAC"). The panel will evaluate the Applicant's demonstrated successful experience on relevant and comparable projects, vision for the Project, approach to Preference Holder engagement, and capacity to meet the Project schedule. The CAC will review the panel's evaluation and will also make a recommendation.

The Executive Director is not required to recommend the Applicant receiving the panel's highest ranking or evaluation and may make a recommendation to the Commission based on other factors, including, but not limited to, the fulfillment of OCII policy and the Applicant's history of uncured defaults, if any, related to prior OCII, SFRA, or MOHCD agreements. For example, OCII may, in its sole discretion, disqualify any Developers and/or Architect or other personnel if they have failed to comply with any OCII, SFRA, or MOHCD agreement or if they are not in

good standing with OCII/MOHCD in relation to the current OCII/MOHCD marketing standards applicable to existing projects. The OCII Commission has the sole discretion, at a public hearing, to make the final selection.

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

A. Important Dates and Submission Process¹

1. Issue Date: RFQ available on the OCII website at: https://sfocii.org/rfps-rfqs-bids , registration opens	November 9, 2023
2. Pre-Submission Meeting (Video call: register through Eventbrite to receive meeting link)	9:30 a.m. November 30, 2023
3. Deadline for written questions / requests for additional information	5:00 p.m. December 5, 2023
4. QUALIFICATIONS SUBMISSION DEADLINE	4:00 p.m. JANUARY 19, 2024
5. Notification to Applicants who failed to meet minimum submission requirements	February 5, 2024
6. Applicant interviews (may be in person or via video call)	Week of February 19, 2024
7. Qualifications evaluated and ranked by Evaluation Panel	
8. Presentation of Panel's Selection to Mission Bay Citizens Advisory Committee	April 11, 2024
9. OCII Commission consideration of Executive Director's recommendation of Applicant selection, Exclusive Negotiations Agreement, and predevelopment loan	May 7, 2024

B. Pre-Submission Meeting

A pre-submission meeting will be held as a video call on the date and time shown above in Section I.A. The purpose of the meeting is to ensure that all potential Applicants understand the minimum qualifications requirements and the selection process. Although attendance is not mandatory, it is highly recommended. Please register through [Eventbrite](#) by 3:00 PM on November 29, 2023. Prior to the meeting, all prospective Applicants registered for the meeting event through Eventbrite will receive a link to the video call. Please note that registering for the pre-submission meeting does not constitute registration as an Applicant under this RFP as described in Section D below.

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 RFQ. All questions and requests for additional information regarding this RFQ must be received **in writing** by OCII (via mail or e-mail) – *on or before* – the time and date as shown above, in Section I.A. Questions received after the deadline may not be answered. All responses and additional information will be distributed via e-mail to all registered parties. 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.

¹ All dates and times subject to change.

D. RFQ Registration

Responses to this RFQ will be accepted only from those Applicants who have registered with OCII. Only registered Applicants will receive answers to submitted questions and additional information as described above. To register, e-mail Kimberly.obstfeld@sfgov.org with the following information:

1. Organization (registered party may be a Developer, Co-Developer, Architect, Property Manager, or Services Provider. Note, however, that only one registration is needed per Applicant team)
2. Name of contact person
3. E-mail address for contact person
4. Phone number for contact person

E. Qualifications Submission Time and Date

Electronic qualifications submittals must be uploaded by the date and time shown below. Registered Applicants will receive submittal instructions, including a OneDrive link to upload submittal materials.

Electronic Submittal Deadline: January 19, 2024 at 4:00 p.m.

Via OneDrive link provided to registered Applicants

SECTION II. BACKGROUND

A. Project Area Overview

The Site is located in the Mission Bay South Redevelopment Project Area ("Project Area"). OCII's website (<http://sfocii.org/mission-bay>) provides links to the following Project Area documents that should be reviewed and considered as Applicants develop their vision for the Site:

- Redevelopment Plan
- Design for Development
- Mission Bay South Design Review and Document Approval Procedure
- Mission Bay South Signage Master Plan
- OPA and amendments
- Final Mission Bay South Subsequent Environmental Impact Report ("EIR") and addenda
- Mission Bay Risk Management Plan

Much of the development anticipated under the Redevelopment Plan is complete or has been initiated and Mission Bay South has successfully transformed from industrial uses to a thriving mixed-use community. The neighborhood features a variety of uses including housing, retail, parks and open spaces, office and medical facilities, a public school (under construction, expected to open for the 2025-26 school year), the Chase Center, and a public safety building that houses police headquarters and local police and fire stations.

1. Affordable Housing Development

The Redevelopment Plan authorizes approximately 3,550 residential units to be constructed within the Project Area. Under the OPA, parcels designated for OCII-sponsored affordable housing ("Affordable Housing Parcels") were pre-selected and comprise approximately 15 acres distributed throughout the Major Phases in the Project Area. The OPA establishes that up to 1,218 units may be developed on Affordable Housing Parcels.

To date, 905 units have been completed on Affordable Housing Parcels (including affordable units and manager's units), and another 148 are under construction (on Block 9a), for a total of 1,053 units. The chart below summarizes the affordable housing units built or under construction on OCII Affordable Housing Parcels in Mission Bay.

Project Area Affordable Housing Parcels Completed or in Development

Site	Address	# of Units	Housing Type	Year Completed
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Block 13 East	1180 4th Street	150	Family rental (including 50 supportive housing units)	2014
Block 7 West	588 Mission Bay Boulevard North	200	Family rental	2017
Block 6 East	626 Mission Bay Boulevard North	143	Family rental (including 29 supportive housing units)	2018
Block 3 East	1150 Third Street	119	Veteran supportive housing (62 units) and family rental (57 units)	2019
Block 6 West	691 China Basin Street	152	Family rental (including 38 HOPE SF units)	2021
Block 9	410 China Basin Street	141	Adult supportive housing	2022
Block 9a	400 China Basin Street	148 ¹	Family for-sale	2024
TOTAL		1,053		

¹ Project under construction.

Thus, with 1,053 units developed or under construction and 1,218 total units authorized, development on the remaining Affordable Housing Parcels, which consist of Block 4E as well as Block 12 West, is currently limited to 165 units. As noted above, OCII may consider pursuing an OPA amendment and, if necessary, a Redevelopment Plan amendment, to increase the allowable number of units.

2. Preference Holder Program

As noted in Section I, creating housing opportunities for Preference Holders is OCII's highest priority in the development of Block 4E. In the 1960s and 1970s, SFRA undertook activities as part of the federal urban renewal program that displaced a significant number of residents and businesses of color. The Preference Holder program, established under state law in 1969, provides priority to low- and moderate-income displaced persons in the leasing and sale of affordable housing by way of a housing preference. Based on state law passed in 2021, the priority has been expanded to include direct descendants of displaced persons.

While displacement did not specifically occur in Mission Bay, it is OCII's goal to familiarize Preference Holders with the Mission Bay neighborhood and create attractive, high-quality housing in Mission Bay that meets Preference Holder needs. In addition, Preference Holders responding to a survey regarding their housing needs and preferences expressed interest in Mission Bay housing.

3. OCII Funding Authority

As a former redevelopment agency, OCII's funding is subject to regulatory review by the State Department of Finance ("DOF") through annual submittal of a Recognized Obligation Payment Schedule ("ROPS"). The ROPS for the 2023-24 fiscal year includes predevelopment funding for affordable housing development on Block 4E. OCII gap funding for the 165 remaining units is an enforceable obligation and will be incorporated into future ROPS based on the Project's financial projects. Funding for any units in excess of the 165 remaining under existing DOF-approved enforceable obligations, if proposed, will be subject to additional financing authority.

4. Mission Bay Affordable Housing Policy

The Housing Program (Attachment C to the OPA) establishes the standards and procedures that OCII will follow in developing affordable housing at the Site. In addition, SFRA adopted a Mission Bay Affordable Housing Policy ("Housing Policy") on September 17, 1998 (Resolution No. 194-98) to guide the development of Affordable Housing Parcels. The Housing Policy states that SFRA (now OCII) will select Qualified Housing Developers under the Housing Program to the OPA through a Request for Qualifications process. As required by the Housing Policy, preference will be given to non-profit housing development corporations headquartered in San Francisco. OCII will then enter into an exclusive negotiations agreement and later, various development agreements with the selected Developers. The type of housing to be built on each OCII site is generally determined as part of the City's Consolidated Plan. The Housing Policy establishes that rental projects on the Affordable Housing Parcels have a

75-year initial term of affordability and average rents consistent with current City and OCII policies, no greater than 30% of 60% of the AMI adjusted for household size and a utility allowance.

5. Development Controls

The Redevelopment Plan establishes general land use controls, including types and intensities of development and public open space in each sector of the Project Area. The companion Design for Development establishes detailed height, bulk, parking, street frontage and other design standards to ensure quality development.

The OPA between OCII (as successor to the SFRA) and FOCIL-MB LLC (successor in interest to Catellus Development Corporation and “Master Developer”) and the Interagency Cooperation Agreement between OCII and other City departments, establish the protocols for development approvals in Mission Bay South. The Master Developer is required to submit its overall plans for development in “Major Phases” of one or more land use blocks, with each Major Phase consisting of the private development projects and related public improvements on these blocks.

The Major Phase for Blocks 2-7 and 13 and Parks P5, P6, P13 and P15 Concept Design Application (“Major Phase”) was approved by the former Redevelopment Commission on November 1, 2004 (Resolution 178-2005). This Phase encompasses an area bounded by Channel Street to the north, 3rd Street to the east, Merrimack Street and Corrine Woods Way to the west, and Mission Bay Boulevard South to the south. The site area of Blocks 2 – 7 and 13 Major Phase is approximately 16.86 acres and is divided into 12 development parcels.

OCII anticipates amendments to the Design for Development, the Major Phase applicable to the Site, and possibly the Redevelopment Plan, to accommodate a maximum number of units for the Site, pursuant to this RFQ. The selected Applicant should be prepared to work closely with OCII to study and formalize any such changes in the Schematic Design approval applications to the OCII Commission.

6. Neighborhood and Transit Amenities

The Mission Bay neighborhood is rich in park and waterfront space, and retail and entertainment amenities. As shown in the amenities map in Attachment 22, there are numerous neighborhood-serving retail outlets and a branch of the San Francisco Public Library located within walking distance of Block 4E or reachable by a short bike ride or a few stops on the T Line. The green colored parcels denote the programmed and planned open space in the neighborhood.

Overall, the Project Area will provide approximately 34 acres of parks and open spaces. Block 4E is located a block from Mission Bay Commons Park, a block from Mission Bay Kid’s Park, a block from the dog park, and three blocks from Mission Creek Park and the planned Bayfront Park (currently under construction).

Block 4E is well served by transit. The Site is adjacent to the Muni Third Street Mission Rock Light Rail station and approximately half of a mile from the Caltrain station located on 4th Street between King and Townsend streets. In addition, the Muni 22 bus line, which connects Mission Bay to the Mission District and the 16th Street BART Station, stops a block away at 3rd Street and Mission Bay Boulevard North.

7. Citizens Advisory Committee

The Mission Bay CAC is an advisory body comprised of residents, business owners, and community organizations in the Project Area, which advises OCII on all matters which affect the Project Area. The CAC reviews all Major Phase applications and Schematic Design submittals in Mission Bay. A member of the CAC will review qualifications in response to this RFQ and will participate in the Evaluation Panel. The recommended Applicant will present their vision for the Site to the CAC prior to Commission action. The Applicant will make presentations and seek CAC at key development milestones, including concept design and schematic design.

8. California Environmental Quality Act (“CEQA”) / National Environmental Protection Act (“NEPA”)

As part of its actions on September 17, 1998, establishing the Mission Bay Redevelopment Project Areas, the Redevelopment and Planning Commissions certified the Final Subsequent Environmental Impact Report (FSEIR), adopted findings under CEQA, adopted a series of mitigation measures, and established a comprehensive system for mitigation monitoring, including special measures by land use. The Board of Supervisors and other City departments adopted similar findings and mitigation monitoring plans. The City, SFRA, and OCII Commission subsequently issued ten addenda to the FSEIR.

Mixed-use multifamily housing development on Block 4E is within the project analyzed in the FSEIR. However, in the case that OCII and the selected Applicant pursue an overall increase in allowable residential units in the Project Area and/or building massing on Block 4E exceeding that allowed under current controls, OCII may undertake environmental review and prepare appropriate documentation in accordance with CEQA. The selected Applicant will collaborate with OCII staff on any required analysis and will provide information as needed to describe the Project and assess impacts.

The selected Applicant 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 that the mitigation measures for Block 4E are appropriately documented and implemented. In addition, the selected Applicant will be responsible for securing environmental review approval under NEPA, if necessary.

B. The Site & Transfer of Ownership

The Site is a flat, rectangular approximately 45,655 square foot lot. The parcel's frontage is as follows: 166 feet along Mission Rock Street and China Basin Street, and 275.03 feet along 3rd Street and the existing adjacent 4 West project (Strata at Mission Bay Apartments). See Attachment 18 for the Final Map. The Site is improved with surface paving and perimeter fencing and is currently in use as a temporary parking lot without any structures.

The selected Applicant will be responsible for pursuing any mapping action, if needed, to facilitate development of the Project such as a lot split, parcel map, or final map.

In accordance with the OPA, Agency Affordable Housing Parcels transfer from the Master Developer to OCII when project is ready to start construction. The Master Developer owns fee simple interest in the Site. At the start of construction, pursuant to the OPA and a recorded Memorandum of Option, the Master Developer will transfer fee simple ownership to OCII at no cost. At that time, OCII will convey the land to the selected Developers in an "as is" condition through a long-term ground lease.

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).

Once the Project is constructed and occupied, OCII will transfer the lease and the underlying land against which the lease will be recorded, to MOHCD as the Housing Successor pursuant to Redevelopment Dissolution Law.

C. Soil Conditions

According to Figure V.J.1 of Volume Two of the Mission Bay Subsequent EIR (SEIR), Block 4E was submerged in shallow water in Mission Bay before it was filled in the late 1800s. Existing data in the vicinity indicate that the site is likely underlain by approximately 15 to 30 feet of fill, which sits above a weak compressible clay known as bay mud. On Block 3 East to the north, bedrock was encountered at a depth of approximately 245 feet. The selected Applicant will need to conduct geotechnical investigations specific and will need to incorporate and budget for design elements appropriate for identified conditions, such as foundation and structural systems, and hinged slabs and design elements that plan for settling of connection points of hardscape areas to building faces, at a minimum. In addition, Developers should budget for soil off-hauling.

1. Soil Contaminants

Soil contaminants currently exist in the Project Area and are assumed to exist at the Site. The principal chemicals that have been detected in the Project Area are petroleum hydrocarbons and inorganic compounds (e.g. heavy metals). Additionally, asbestos was detected in the soil primarily from serpentine rock, which was imported to fill Mission Bay. No significant concentrations of volatile organic compounds have been detected in soil or groundwater. Limited concentrations of select volatiles such as benzene were found around the former petroleum storage facilities in the Project Area, but are not expected to affect the Site. None of the chemicals were detected at concentrations that would pose a threat to human health following the completion of the planned Project Area development.

2. Risk Management Plan

A Risk Management Plan ("RMP") has been approved for the Project Area that summarizes the types of contaminants present and the measures that must be taken. Current and future owners, occupants, and property

managers must comply with these measures. A copy of this report can be found on OCII's Mission Bay website at <http://sfocii.org/mission-bay>.

3. Cleanup Roles and Responsibilities

The OPA establishes the general principles by which responsibility for investigating and responding to environmental hazards is assigned. Further, a Memorandum of Agreement for Incremental Environmental Costs on Mission Bay Affordable Housing Sites (“MOA”) between OCII and the Master Developer and executed November 19, 2001, describes in more detail the methods by which incremental costs will be calculated and reimbursed by the Master Developer.

4. Limitations to Incremental Costs: No Underground Parking

The Master Developer’s MOA to pay for all incremental costs is limited by (1) the exclusion for costs related to the construction of subterranean garages, and (2) the developer’s reasonable efforts to provide for grading to be balanced on site. For this reason, the development concept prepared by the selected Applicant may not include underground parking.

D. Schedule Considerations

As previously noted, the Redevelopment Plan will expire in 2028. OCII anticipates a schedule in which the Project has closed on construction financing and is well into the construction period by that date. To achieve this, OCII has outlined key schedule milestones as follows:

Milestone	Timeframe
OCII commission consideration of schematic designs	Q2 2025
Site permit issued	Q1 2026
Tax-exempt bond/low-income housing tax credit application	Q1 2026
Close of construction financing/notice to proceed	Q4 2026

All timeframes are preliminary and subject to change. Applicants should acknowledge this schedule in their qualifications submittals and propose an approach and staffing that are responsive to schedule expectations. The selected Applicant will work closely with OCII to finalize a comprehensive development timeline.

SECTION III. DEVELOPMENT PROGRAM

A. Housing Development Concept

OCII’s goal for the Site is the development of high-quality affordable housing , with thoughtfully designed residential units and amenities serving low-income households and households experiencing homelessness. Meeting the housing needs of Preference Holders and maximizing Preference Holder occupancy is a top priority in the development of this Site.

Development should provide a maximum number of affordable units, while ensuring the highest quality property management practices and quality living environments. The below table summarizes the OCII programming guidelines for the Site:

Program Element	OCII Requirements
Units	A maximum number of high-quality units with a target unit mix of: • 25% 1 bedroom/1 bathroom: minimum of 500 net square feet • 50% 2 bedroom/1 or 1.5 bathroom: minimum of 850 net square feet • 25% 3 bedrooms/1.5 or 2 bathrooms: minimum of 1,100 net square feet

Commercial space(s)	Community-serving and/or public benefit commercial space(s) totaling approximately 1,200 to 3,000 square feet, may be provided in a single space or two spaces. Target uses may include: • Arts and culture: facility providing accessible arts opportunity through cultural arts and programs, or facility to promote the production of arts and arts programs • Social welfare: facility that provides employment and workforce development services, services with seniors and/or adults with disabilities, and youth or family services • Health: public health clinic or community health organizations • Youth programs and services: education, tutoring support, enrichment, and related programming
Interior services and management spaces	• Desk staff at main residential entrance (24-hour desk coverage) • 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 • Storage space for supplies, replacement furnishings, and program materials
Community spaces/amenities	• At least one common area/community room with adjacent or incorporated kitchen • Varied spaces that allow for both active programming and passive use • Include spaces tailored to meet the needs at various life stages. Such space may include: remote work rooms, homework rooms, children's play rooms, teen spaces, lounges, and fitness rooms.
Open space	• Ground floor or podium level open space courtyard, at the center of the block, generally aligned with the central courtyard of the adjacent building at Block 4 West • Upper floor terraces as needed to meet open space requirements.

Please refer to Section II.G and H below for design standards and guidance. OCII reserves the right to modify the development program following selection of an Applicant. 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.

B. Target Populations

As previously noted, Block 4E will provide affordable housing serving low-income households and households who have experienced homelessness. Applicants should assume that a portion of units will be set aside for households who have experienced homelessness.

Housing Preference Holders is of the highest priority and may require innovative recruitment and selection methods to maximize Preference Holders' participation. Additional information regarding preferences for resident selection is described in Section III.C below. In addition to the Preference Holder outreach and the occupancy preference, the selected Applicant will be expected to collaborate with Preference Holders, community stakeholders, MOHCD, and OCII to identify and address Preference Holder housing needs and preferences. This may include housing features, amenities, program elements, and/or income levels. The qualifications submittal should describe the Applicants approach to Preference Holder engagement on all aspects of Project development.

Low-Income Families

Units 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.

Formerly Homeless Households

Applicants should assume that a minimum of 20% of units will serve households who have experienced homelessness. The number/percentage of units is subject to change at the discretion of OCII and HSH. In addition, the specific household type is to be determined. Household types may include some combination of adults, older adults, families with and without minor children, transitional aged youth ("TAY"), or others as deemed appropriate and necessary by HSH in the implementation of HSH's 2023-2028 Strategic Plan. These units are essential in

addressing the City's homelessness crisis. The need for permanent supportive housing units is further addressed the City's 2022 Housing Element of the General Plan and MOHCD's 2020-2024 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 III.E below. All referred applicants will be persons or households experiencing homelessness in San Francisco, which includes Preference holders. All Preference holders who are in the Coordinated Entry system will be prioritized for referral, which must be coordinated with MOHCD preferences staff.

Supportive housing tenants will contribute 30% of their income toward rent. The difference between the tenant contribution and the cost to operate the unit will be covered by the City's Local Operating Subsidy Program ("LOSP") and/or other available rent or operating subsidies such as Continuum of Care funds or project-based housing choice vouchers. Applicants should refer to the San Francisco LOSP Policies and Procedures Manual for additional information.

C. Occupancy Preferences, Resident Selection & Marketing

Preference for occupancy of units in the Project shall be given first to Preference Holders 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 will be given in the following order:

1. Preference Holders, including descendants of originally displaced individuals (Cal. Health & Safety Code §§ 33411.3 & 34178.8) (please see Attachment 22 for the Property Owner and Occupant Preference Program, adopted in 2020)
2. Displaced Tenants Housing Preference
3. Neighborhood Resident Housing Preference
4. San Francisco residents or workers
5. Members of the general public

The Developers will establish tenant selection policies for the Project. Tenants must meet the income eligibility criteria and the Developers' established screening requirements for, 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 or its agent will work with the selected Developers to resolve any potential occupancy conflicts and to ensure adherence to the above-listed OCII occupancy preferences and marketing requirements.

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

Advertising and Marketing

Starting one month after construction commencement, the selected Developers must provide an Early Outreach Plan with an emphasis on outreach to and rental readiness and application preparation assistance for COP Holders. The Developers must select a third-party housing counseling agency 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 a robust marketing plan. The Developers must provide notice of the rental opportunity through public meetings and mailings, and 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.

D. Affordability Restrictions and Financing

Financing for the Project will be subject to underwriting using the current version of OCII/MOHCD Underwriting Guidelines and MOHCD policies. Applicants should familiarize themselves with these guidelines and policies, which can be found on the MOHCD website at <http://sfmohcd.org/documents-reports-and-forms> and <http://sfmohcd.org/asset-management-multifamily-rental-housing>. Policy documents include: Underwriting Guidelines, Residual Receipts Policy, Operating Fees Policy, Ground Lease Policy, Loan Agreement Policy, Tax Credit Developer Fee Policy, and the LOSP Policies and Procedures Manual.

OCII's goal is that the Project remains 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. Following conversion to permanent financing, OCII will transfer its interests to MOHCD as the Housing Successor.

Limited OCII resources may be available to assist in the development of the Project; however, the selected Applicant will be expected to aggressively pursue non-OCII sources of development financing. The selected Applicant will prepare a comprehensive financing plan for the Project prior to any OCII authorization of loan funds. Please note that a detailed financing plan and proforma are **not** required as part of the qualification submittal. OCII expectations regarding financing are outlined as follows:

- **Primary capital funding sources.** Sources will likely consist of the following:
 - Low-income housing tax credits with tax-exempt bonds (9% credits from the regional pool will not be available for 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 (see Section II.A.2 – Background); and
 - Any other funding that Applicants deem appropriate and feasible.

Applicants should describe their financing strategy and related schedule considerations as part of their narrative description of their project vision, pursuant to Section V.A.

- **Rents.** OCII will require that AMI levels are tiered to accommodate households at a wide range of income levels, offering a portion of units affordable to households at and below 50% of AMI, and to maximize leasing to Preference Holders. OCII agreements will require that rents be set at an amount that is affordable to households earning up to 80% of AMI as published annually by MOHCD, with an average rent/AMI at or below 60% (pursuant to CTCAC income averaging regulations and MOHCD Underwriting Guidelines). AMI tiering is subject to review and approval by OCII and must consider marketability.
- **LOSP.** The selected Applicant should assume that units set aside for households experiencing homelessness will receive LOSP funding through 15-year contracts with MOHCD. Note, however, that the selected Applicant may be required to apply for subsidies through the Continuum of Care or other available sources to support these units.
- **Supportive Services funding.** The selected Applicant will be expected to prepare plans and budgets for supportive services for tenants who have experienced homelessness. The plans and budgets will be subject to review and approval by HSH. While supportive services funding may be available from HSH, the selected Applicant will be expected to explore other funding sources and to leverage any local funding provided to secure

outside sources. Funding for resident services for low-income tenants is expected to be funded through the operating budget, subject to the Underwriting Guidelines.

- **Ground lease rents.** The selected Developers will enter into 75-year initial term ground lease agreement with OCII (with options to extend to a total of 99 years). The annual rent will be set at 10% of the appraised unrestricted value of each site and will be re-determined every 15 years thereafter, as determined by an MAI appraiser selected by and at the sole cost of tenant. Base rent of \$15,000 will be payable annually as an operating expense ("above the line"). 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.

E. Resident Services

The successful provision of resident support services will be critical to the overall success of the development program. The qualifications submittal should clearly describe which entity/entities will be responsible for the provision of resident services and supportive services, describe the organizational capacity of the provider(s), and address an approach to providing services for all target resident populations.

Resident services should include the coordination of on-site activities for children. These may include after school homework and/or tutoring help, arts and crafts, and other enrichment activities. Children's service programming should take into consideration the special needs of children who have experienced homelessness and be prepared to address cases of emotional and behavioral issues.

1. Minimum Requirements:

- An understanding of the housing and service needs of the tenant populations;
- An approach that anticipates: tenant-based services, connections to mainstream resources, access to and connections with community-based programs and services, subcontracted and/or partner services, and coordination with property management; and
- Experience effectively providing comparable resident services and supportive services in a housing setting.

2. Supportive Services

Residents who have experienced homelessness will require intensive support services and case management. The service models should focus on a housing first approach that centers equity with intensive wrap-around services. The Service Provider must demonstrate familiarity with the core principles of the trauma informed system (TIS). The Service Provider will be expected to use a tenant-centered model that provides, or facilitates in the provision of, an array of voluntary services that encourages tenants to utilize them. In addition to case management, 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 will be refined with HSH and adjusted based on the specific household type(s) to be referred to the Project and may include:

- TIS that includes initial and ongoing training for both services and property management staff/teams;
- Engagement and assessment of formerly homeless households in collaboration with property management during the resident selection period;
- Ongoing outreach and engagement to the tenant populations;
- Mental health and substance use support and referrals
- Services through a harm reduction approach and model
- 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 employment skill development, and job placement and retention services;
- Parenting support and life skills coaching using trauma informed parenting providers;
- Access to benefits and educational opportunities as appropriate; and
- Opportunities to move up the housing ladder via the Moving On Initiative or other programs.

F. Property Management

The Property Manager must demonstrate successful approaches to managing buildings serving the proposed resident population, including family housing and integrated housing that serves households who have experienced homelessness. Applicants must provide a narrative description of the Property Manager's specific experience supporting these communities. This narrative should include the Property Manager's experience with and approach to working with on-site service providers to ensure resident safety and stability.

The Property Manager 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 at regular meetings. Applicants must also show that the Property Manager is experienced in assisting new developments to become integrated into the neighborhood by cultivating good relationships with neighborhood residents, businesses, and other stakeholders, including meeting neighborhood standards regarding sidewalk cleanliness, litter and graffiti control. Applicants should provide information regarding the Property Manager's approach to building security and maintenance. Applicants should assume that the Property Manager will provide 24-hour desk coverage.

G. Land Use Restrictions

The land use controls of the Redevelopment Plan apply to Block 4E, and its development is subject to the review and approval of OCII. The Redevelopment Plan and Design for Development are available on OCII's website at <http://sfocii.org/mission-bay>. Since the Site is located within a redevelopment area, these Mission Bay redevelopment documents replace the City's zoning regulations.

The requirements include, but are not limited to, the following categories: density, open space, height/bulk, parking, off-street loading, bicycle parking, setbacks, signage, and utilities. The selected Applicant will be responsible for ensuring that designs comply with applicable development requirements.

As noted above, OCII may consider a program and design that exceeds the amount of development anticipated under existing development controls applicable to Block 4E in order to maximize the delivery of affordable housing units. Any proposed change to the development controls is subject to further studies, financial feasibility analysis, 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 Board of Supervisors. Applicants should address their experience with similar actions on comparable projects and describe their approach to addressing the myriad of issues associated with zoning changes and similar actions in their submittal (see Section V.B).

H. 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, master-planned, residential neighborhood. In addition to offering highly functional residential spaces, the designs will be required to incorporate contextual designs that respond to the surrounding architecture and enliven the public realm through active ground floor uses.

The Design for Development allows for the maximum amount of creativity from the Applicant by identifying basic standards and guidelines, but otherwise depending primarily on design guidelines to direct the rest of the building design. See table below for a summary of the design standards. Please refer to the Design for Development document for a comprehensive set of design standards and guidelines.

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

Design and development controls standards described herein are not comprehensive and are provided for informational purposes only. These controls should be referenced as Applicants develop a vision for the Project and approach to the development process. As discussed in Section V below, design diagrams are **not** required in the qualifications submittal and will **not** be accepted.

Design Element	Development Standards
Height*	• Base height: maximum 65' • Mid-rise height: maximum 90' • Tower height: maximum 160'
Bulk*	Applicable only to any building portion above 90': • Plan diagonal: maximum 190' • Plan length: maximum 160' • Floor plate: maximum 17,000 sf
Lot Coverage	100% lot coverage to a maximum height of 40'. For building portions above 40', a maximum of 75% lot coverage is allowed.
Street Wall	Regulations include corner treatments and projections (refer to Section III Design Standards in the Design for Development)
Setback	• 3rd Street: a 5' setback from the property line to the building face is required. • Side: no setback is required from the shared property line between the two parcels. Assume standard fire separation requirements. • Mission Rock/China Basin Streets: no setback is required. Recess garage entries a minimum of 2' from primary building façade.
Ground Floor	• Locate active uses (residential lobbies, commercial, community spaces, etc.) along street frontages on as much of the façade as possible. • Ground floor residential units are optional and if provided must be elevated to account for sea level rise considerations (see Section III.H.4 below) and include pedestrian street-level access.
Open Space*	• Minimum 70 sf per residential unit • May be satisfied through any combination of a courtyard (ground or podium level), rooftop decks or gardens, solariums, or other landscaped areas. • Minimum horizontal dimension for any private open space is 6'
Vehicular and Bicycle Parking	• Vehicular parking should be provided to the maximum extent feasible, with an approximate target ratio of 0.25 space per unit for residents. • Consider a minimum bike ratio of 0.50 space per unit, provided in secured Class 1 facility.
Loading, Vehicular Access, and Refuse	• No loading facilities are required for residential development below 100,000 square feet; one space is required between 100,001 and 200,000 square feet; two spaces between 200,001 and 500,000 square feet. • Consider siting loading space(s) on Mission Rock Street and/or China Basin Street. • Vehicular access should be provided on Mission Rock Street and/or China Basin Street (assume no curb cuts along 3rd Street) • Designated area in the building or garage to accommodate separation of refuse and to meet Recology's pick-up requirements (consider access from Mission Rock or China Basin Streets)

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 http://default.sfplanning.org/publications_reports/bird_safe_bldgs/Standards%20for%20Bird%20Safe%20Buildings%20-%202011-30-11.pdf • LEED “Gold” rating or Green Point Rating of 125 or higher
Building Orientation	• Screen parking and utility areas along street frontages with ground floor uses and/or architectural elements. • Lobby shall be visually appealing in a pedestrian scale and character, with an architecture distinct from the rest of the building facade.
Internet Access	Compliance with MOHCD Communications System Standards (https://sf.gov/sites/default/files/2023-02/MOHCD%20Communications%20Systems%20Standards.pdf) to incorporate infrastructure to provide infrastructure for high quality internet access for residential units

** Pending approval of an OPA amendment to increase the allowable number of affordable housing units, OCII may consider increases to the maximum heights, and modifications to the bulk and open space standards applicable to the Site to increase the number of residential units. OCII staff have modeled scenarios in which the Site is developed with two buildings, increased building heights, and with bulk and tower separation restrictions similar to those applied to the Mission Rock project. The study is included for reference as Attachment 19. The selected Applicant may collaborate with OCII to review height, bulk, and tower separation alternatives to determine an appropriate and financially feasible recommended development program. Applicants should address their approach to this exercise in the vision narrative described in Section V.*

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 will seek 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. Sea Level Rise/Flood Considerations

According to the *San Francisco Sea Level Rise Action Plan*, Mission Bay is located within the San Francisco Sea Level Rise Vulnerability Zone, and thus storm event flooding and sea level rise are important considerations for all development in the Project Area. The selected Applicant will review available sea level rise materials and incorporate appropriate design features into the design to minimize building damage and ensure resident health and safety in a high-water event. Such features may include but are not limited to backup generators, elevated utility and mechanical equipment, pumping systems, foundation treatments, landscaping features, and building materials and finishes.

4. Priority Permit Processing

The Project is subject to priority permit processing under Mayoral Executive Directive 17-02, which is intended to expedite the production of housing in San Francisco. The selected Applicant will be expected to diligently pursue required permits, follow labeling protocols, submit clear and complete application materials, provide thorough and timely responses to City agency comments, and provide regular updates to OCII staff regarding the status of all pending and upcoming permit applications.

I. Equal Opportunity Programs

OCII has an Equal Opportunity Program (“EOP”) that consists of various policies requiring OCII-sponsored projects to provide benefits to economically disadvantaged communities and local residents. EOP policies and Programs are further discussed in Section VI and Attachments 11 through 17 of this RFQ.

As previously noted, an Applicant is defined as a team comprised of only the following: 1) a qualified Lead Developer, 2) a Co-Developer, 3) a Property Manager, 4) a Supportive Services Provider, and 5) a Lead Architect 6) a Workforce and Contracting Action Plan (“WCAP”) Lead(s) (note: the WCAP Lead may be an in-house employee or outside consultant with the knowledge and capacity to lead EOP efforts). Any and all other consultants to the development team shall be brought on to the project at a subsequent stage pursuant to OCII’s SBE Policy.

As part of the qualifications submittal, the Applicant should clearly identify which team member(s) will be responsible for compliance with the EOP, acting as the WCAP Lead in corresponding with OCII Contract Compliance staff and ensuring that EOP goals and programs are addressed in solicitations and affirmed in contracts.

Applicants must submit a WCAP that clearly addresses how the team will implement the SBE Program, and Construction and Permanent Workforce Policies on the Project. Applicants must also agree to comply with the Nondiscrimination in Contracts and Benefits, Minimum Compensation, and Health Care Accountability Policies, as well as the payment of prevailing wages. The WCAP should describe how an SBE associate architect and a general contractor joint venture (described below) could be utilized in the Project.

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

SBE Associate Architects

OCII requires that the successful Applicant cooperate with OCII to identify substantive design elements of the Project, to the extent practicable and economically feasible, to be offered to a 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 discreet massing components 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.

General Contractor Joint Venture

OCII requires that the selected 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.

J. Community Outreach

It is critical to the success of the development program that the selected Developers establish positive links with the Mission Bay community throughout the development process. A CAC member will review qualifications submittals and participate in the Evaluation Panel. The CAC will review the recommended Applicant prior to review by the OCII Commission. In addition, the CAC will be asked to make a recommendation regarding schematic design for the Projects and on OCII financing approvals for the Projects. The selected Developers are expected to maintain a relationship with the CAC throughout predevelopment, construction, and on an ongoing basis once the Project is operational.

SECTION IV. SELECTION PROCESS & CRITERIA

A. Selection Process

1. Qualifications submittals will be accepted only until the dates and times shown in Section I.A and E.
2. Submittals will be electronic, uploaded to OneDrive pursuant to instructions emailed to registered Applicants. No submissions received by mail, facsimile, or electronic mail will be considered. The Applicant

is solely responsible for ensuring that all information requested in Section V Submission Requirements is submitted.

3. OCII staff will contact references.
4. Applicants who have provided qualifications submittals that meet the requirements of this RFQ will be interviewed. Interviews are expected to be held on the date(s) shown in Section I.A, however, these dates are subject to change. Applicants should advise OCII staff of availability on these days. Interviews may be held at OCII (located at One South Van Ness Avenue in San Francisco on the Fifth Floor) or online via video call.
5. Further information or written material regarding qualifications 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 as well as the Applicant team members' experience as described below.

Maximum Points	Criteria
30	Development Vision
10	Development approach: • Program concept; • Financing strategy with a focus on feasibility within the development schedule; • Strategy for addressing diversity, equity, and inclusion in all aspects of the Project, including the team composition, and approach to meeting or exceeding OCII SBE goals; • Strategy for identifying Preference Holder needs and preferences to inform the development program; • Community outreach and engagement; • Cost containment strategy; and • Determining and meeting a compressed development schedule.
5	Design approach: • Vision for relationship between the buildings and the relationship of Project to the surrounding environment; • Inspirational images and guiding concepts; • Strategy for studying conceptual designs, collaborating with OCII, and expeditiously recommending a massing concept; and • Strategy for delivering high quality housing within a constrained budget.
5	Property management approach: • Address considerations and strategies for managing and maintaining larger-scale residential properties; • Strategy for working collaboratively with supportive services to maintain resident housing stability; and • Staffing the Project.

5	Supportive services approach: • Strategy for working collaboratively with property management to address resident needs and issues; • Approach to providing culturally competent services appropriate to the tenant population; • Staffing the Project.
5	Marketing approach: • Strategy for successfully housing Preference Holders; • Preference outreach approach for advertising and leasing, including any innovative or creative approaches for Preference engagement and lease-up; • Overall marketing strategy and approach; and • Staffing for implementing early outreach and marketing plans and lease-ups.
70	Team Experience and Capacity
10	Applicant team composition and structure: • Team composition is aligned with diversity, inclusion, and equity strategy described in the development vision; • Roles and responsibilities are clear, aligned with the development vision, and well considered to expedite development while ensuring meaningful participation that builds upon the strengths of various team members; and • Submittal includes MOU or similar agreement between the Lead Developer and Co-Developer
10	Lead Developer: • Experience developing and marketing affordable housing comparable to the housing described in this RFQ and in accordance with current OCII/MOCHD standards; • Participation in innovative projects addressing affordable housing challenges; • Expertise in best practices regarding community development; • Deep knowledge of local, regional, and/or national models for community engagement; • Experience with OCII/MOHCD marketing policies and participating in lotteries through MOHCD's DAHLIA system; • Demonstrated understanding of the Preference program and or experience successfully marketing to and housing Preference Holders; • Expertise in government assisted affordable housing programs and financing sources; • Collaborating effectively with a co-developer; • Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs; • Track record of delivering comparable projects on schedule and on budget; • Providing meaningful project opportunities/scopes to mentor and build capacity for co-developer and other contractors, especially disadvantaged firms; • Staffing plan and strategy for consistently staffing the Project in the event of staff turnover or absences.

10	Co-Developer: • Experience developing and marketing affordable housing comparable to the housing proposed in this RFQ and in accordance with current OCII/MOCHD standards; • Demonstrated understanding of the Preference program experience marketing to and housing Preference Holders; • Demonstrated track record in performing the roles and responsibilities to be undertaken pursuant to the MOU; and • Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs; • Staffing plan and strategy for consistently staffing the Project in the event of staff turnover or absences.
10	Architect: • Experience delivering comparable affordable housing on schedule and on budget; • Demonstrated experience partnering with a SBE associate architect, in an approach that provides a meaningful growth opportunity and an efficient division of responsibilities; • Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs; • Staffing plan is appropriate to advance the Projects in accordance with the schedule.
10	EOP/WCAP: • Demonstrated commitment to prioritizing SBE participation in project development and construction, and creating meaningful SBE growth opportunities; • WCAP Lead and other staff responsible for leading EOP compliance are clearly identified; • Responsible staff demonstrate an understanding of economic opportunity programs, including a commitment to diversity in contracting, and capacity to lead compliance efforts; and • WCAP is detailed and clear (provides a strategy, not just a statement of commitment).
10	Services Provider: • Track record of providing culturally competent supportive services; • Demonstrated success in helping residents achieve housing stability; • Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs; • Capacity of the provider and demonstrated ability to fill open positions are in a timely manner with qualified staff; and • Demonstrated experience providing, or bringing in, clinical support for the staff and tenants.

10	Property Manager: • Experience and successful track record of managing affordable housing buildings serving a comparable resident population in a culturally competent manner; • Skilled in maintaining high facility standards, long-term asset stewardship, and high resident satisfaction; • Experience effectively coordinating with on-site services providers; • Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs; • Capacity of the project management entity, including capacity to manage ground floor community space, and demonstrated ability to fill open positions in a timely manner with qualified staff; and • Demonstrated success in marketing and leasing retail spaces to community-serving local businesses.
100	Maximum Total Points

The selection panel will provide a recommendation to the Executive Director, who will, in turn, provide a recommendation to the OCII Commission. The Executive Director is not required to recommend the Applicant receiving the panel's highest ranking or evaluation but may recommend a developer to the Commission based on other factors, including, but not limited to, the fulfillment of OCII policy and the Applicant's history of uncured defaults, if any, related to prior OCII, SFRA, or MOHCD agreements. The OCII Commission has the sole and absolute discretion to make, at a public hearing, the final selection.

SECTION V. SUBMISSION REQUIREMENTS

The Applicant must submit electronically, based on the instructions emailed to registered Applicants. Applicants are to provide the requested information in the order indicated below. Each section A-G must be a separate PDF file, with the file name labeled according to the Section names below.

The qualifications submittal must be uploaded on or before the time and date shown above in Section I.E. Late, incomplete, mailed, emailed, or faxed submittals will **not** be considered.

A. Development Vision

Provide the following documents:

1. **Project Description (Narrative):** Submit a narrative of no more than six (6) pages describing the Applicants' vision for the Project. The narrative should address:
 - a. Development approach:
 - Vision for the program of the Project, including residential and commercial uses, and amenities;
 - Strategy for financing the Project, including a discussion of likely capital and operating subsidy sources and why such sources may be a good fit for the Project as well as any innovative or unique financing strategies that may be viable and appropriate;
 - Strategy for addressing and ensuring diversity, equity, and inclusion in all aspects of the Project including community engagement, predevelopment, construction, and operations;
 - Meeting or exceeding OCII SBE goals;
 - Engagement with the CAC and outreach to the broader community at various stages of development;
 - Anticipated schedule overview and the schedule relationship between the two buildings, and methods the Applicant may employ to ensure that the Projects progress in accordance with the schedule.
 - b. Design approach:

- Strategy for determining a massing concepts for the Site;
 - Coordination within Applicant team members and collaboration with OCII;
 - Consideration of how the building might relate to neighboring buildings with regard to scale, form, and open space, and how design concepts will be refined to meet target resident population and operational needs;
 - Strategy for soliciting and incorporating feedback from local community-serving organizations and businesses in designing the ground floor commercial space;
 - Select relevant inspirational images that convey a concept that may influence the design concept for the Site;
 - Strategy for meeting an expedited design and development schedule;
 - Cost containment strategies and approach to delivering high quality buildings with constrained resources.
- c. Property management approach:
- Considerations and strategies for managing larger-scale residential projects, including long-term facility preservation;
 - Strategy for working collaboratively with supportive services to maintain resident satisfaction and housing stability; and
 - Anticipated staffing.
- d. Supportive services approach:
- Strategy for working collaboratively with property management to address resident needs and issues; and
 - Providing culturally competent services appropriate to the tenant population; and
 - Anticipated staffing.
2. **Marketing Approach (Narrative):** Submit a narrative of no more than two (2) pages describing the approach to marketing and lease-up, with a particular emphasis on strategies to maximize Preference Holder placement:
- Strategy for engaging Preference Holders and successfully housing a maximum number of Preference Holders at the Project;
 - Strategy for identifying Preference Holder needs and preferences and incorporating these into the building program and design, to the extent feasible. The strategy may include review of available Preference Holder household data, Preference Holder engagement in design charrettes, interviews with Preference Holder-serving organizations, and other methods;
 - Innovative and effective best practices for reaching diverse community groups;
 - Marketing and lease-up strategy; and
 - Staffing for implementing early outreach and marketing plans, and managing the lease-up.

NOTE: No 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 considered in the review of qualifications.

B. Applicant Description

1. **Applicant Structure and Approach (Narrative):** Provide a narrative of no more than two (2) pages that describes how the team will work together during predevelopment, construction, and in the ownership and operation of all aspects of the completed project. The narrative should:
- a. Clearly articulate key Developer and Co-Developer roles and responsibilities.
 - b. Identify the party or parties responsible for leading EOP compliance.
 - c. Identify the party or parties responsible for resident services and supportive services.
 - d. Identify the party or parties responsible for property management.

- e. Identify the party or parties responsible for early outreach, marketing, and lease-up.
2. **Memorandum of Understanding (“MOU”)**: Attach MOU between the Developer and the Co-Developer.
3. **Applicant Description Form (Attachment 1)**: Complete the Applicant Description Form to establish compliance with definition of “Qualified Housing Developer” under Section 1.32 of the Mission Bay South Housing Program (Attachment C to the OPA).
4. **Résumés**: Submit résumés for all persons identified on the Applicant Description Form.
5. **Organizational Documents**: Submit a current copy of the following documents for the Developer/Co-Developer:
 - a. Certificate of 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).

C. **Developer and Co-Developer Experience & Capacity**

1. **Developer and Co-Developer Experience (Narrative)**: Submit a narrative of no more than two (2) pages describing the relevant experience of the Developer and Co-Developer. The narrative should address:
 - a. Experience developing complex affordable housing projects on in-fill sites, and track record in delivering projects on schedule and within budget. As applicable, highlight experience in innovative projects addressing affordable housing challenges.
 - b. Experience effectively partnering with other developers and ways in which the experience of the Developer and Co-Developer is complementary and why it is relevant in preparing the team to successfully complete the Project.
 - c. Expertise in affordable housing finance and experience securing capital and operating sources anticipated for these Projects. As applicable, highlight any experience in successfully utilizing unique or innovative financing strategies.
 - d. Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs.
 - e. Understanding of the Preference Holder program and relationships with organizations serving Preference Holders.
 - f. Relevant marketing experience, including Developer’s experience, if any, with successful targeted outreach to Preference Holders and with MOHCD’s electronic marketing and housing portal, DAHLIA.
 - g. Staffing plan and strategy for consistently staffing the Project in the event of staff turnover or absences.
2. **Developer and Co-Developer Experience in Comparable Projects (Attachment 3)**: Complete the Comparable Projects Experience Form for the Developer and Co-Developer. Developer and Co-Developer should use this chart to convey their experience in at least one (1) up to a maximum of two (2) projects completed within the past ten (10) years by the Developer and Co-Developer, that are *comparable* to the proposed Projects. For purposes of this RFQ, a comparable project would be an affordable family rental housing project of 100 units or more. Photos of projects may be included, but are not required.
3. **Developer and Co-Developer Workload Capacity (Attachment 2)**: Complete a Staffing Workload Form for the Developer and the Co-Developer. The forms must identify all staff members for each of the developer entities who will have a project management role.

4. **Developer and Co-Developer Experience in Other San Francisco Projects (Attachment 4):** Complete the San Francisco Projects Experience Form. Developer and Co-Developer 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.
5. **WCAP (Narrative):** Submit a 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 RFQ and includes information regarding the following:
 - Demonstration of the Applicant's knowledge and familiarity with OCII/City workforce and contracting policies and programs.
 - Clear identification of the WCAP Lead responsible for leading EOP compliance (this person(s) will be responsible for regular coordination with OCII on program implementation). This may be a staff member(s) at one or more of the Developers or an outside contractor. Describe the experience of the responsible party in this work and describe their preparation for undertaking this role, understanding of the program, capacity, and relevant experience.
 - Demonstration of the Developer and Co-Developer's track record of prioritizing SBE participation in project development and construction. Highlight ways in which the Developer or Co-Developer will collaborate with partners to create meaningful SBE growth opportunities.
 - Identify specific implementation actions that the Applicant proposes to achieve the best results for meeting or exceeding the goals.

D. Architect's Experience & Capacity

1. **Architect's Experience (Narrative):** Submit a narrative of no more than two (2) pages describing:
 - a. Relevant Experience: Describe the Architect's experience on affordable housing projects of a similar scale in San Francisco and/or in other urban settings. Explain how this experience has prepared the Architect for this opportunity. Include descriptions of the specific experience of staff members who will be assigned to the Project. Provide examples of the Architect preparing design submittals on an accelerated timeline and within constrained budgets.
 - b. "Green" Experience: Describe green building design experience and evidence of current Green Point Rated professionals, if any.
 - c. Local Regulatory Experience: Describe experience working with the San Francisco Department of Building Inspection and other permitting agencies, if any. Highlight any experience on projects that required re-zoning and CEQA analysis.
 - d. Staffing Capacity: Describe how the staffing capacity reflected in Attachment 2 is appropriate for this Project and is sufficient to meet the anticipated schedule.
 - e. Racial Equity: Describe the Architect's efforts to improve diversity, equity and inclusion. This may include training programs, recruiting and hiring practices, staff training, and collaborations.
 - f. Management of an Associate Architect: Describe experience working with an associate architect(s) and how associate architects could be utilized on this Project.
2. **Architect's Experience in Comparable Projects:**
 - a. Project Descriptions: On no more than one page for each project (including the photos described below), provide a description of at least one, but no more than three (3), completed comparable developments (preferably projects located in San Francisco). For all projects, include the design and development timelines, dates completed, and client contact information. Note any budget or financing constraints. If the Architect was not the sole architect, please describe the Architect's role in the project.

- b. ***Photos:*** Submit three (3) 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.).

3. **Architect's Workload Capacity (Attachment 2):** Complete the Staffing Workload Form. Include all staff members who will have a role on the Project.

E. Services Provider Experience and Capacity

1. **Service Provider's Experience (Narrative):** Provide a written narrative of no more than one (1) page describing the Services Provider's approach to providing services to residents of affordable housing.
 - Experience in providing culturally competent supportive services and collaborating with parties from different disciplines (e.g. developers, property management agencies, government, outside service providers, etc.).
 - Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs.
 - 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.
 - Describe the organization's capacity provide services at new projects, and demonstrated ability to fill open positions in a timely manner with qualified staff.
 - 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 Supportive Services Provider's Experience Form.

F. Property Manager Experience and Capacity

1. **Property Manager's Experience (Narrative):** Provide a written narrative of no more than one (1) page describing the Property Manager's relevant experience and approach to serving residents in affordable housing communities:
 - Experience managing an affordable rental housing community serving a comparable tenant population, including buildings in which a portion of units are occupied by households who have experienced homelessness, and of a comparable scale.
 - Experience effectively collaborating with on-site and community supportive service providers. Provide examples of positive working relationships.
 - Policies and practices to ensure resident safety and stability.
 - Demonstrated commitment to racial equity and effective implementation of organizational diversity, equity, and inclusion plans and programs.
 - Anticipated project management staffing, organizational capacity to take on new projects, and demonstrated ability to fill open positions in a timely manner with qualified staff.
2. **Property Manager's Experience in Comparable Projects (Attachment 5):** Complete the Property Management Experience Form.

G. Other Required Information

1. **Disclosure Questions (Attachment 7):** Each 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 a complete, signed certification will disqualify the submittal.**
2. **Statement of Compliance with OCII Policies (Attachment 8):** The 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.**
3. **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)** made payable by check to OCII as part of the qualifications submittal. This payment shall be refunded to all Applicants not selected by the OCII Commission. (It shall also be refunded in the event an Applicant selected by the OCII Commission does not obtain OCII Commission approval for development of the project.) ***Failure to include a valid "Offer to Negotiate Exclusively Deposit" will disqualify the submittal.**
4. **Submission Checklist (Attachment 10):** Complete and submit the Submission Checklist, certifying that all required items are contained in the qualifications submittal.

THIS IS THE END OF THE SUBMISSION REQUIREMENTS SECTION.

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

APPLICANTS SCORES MAY BE NEGATIVELY IMPACTED BY ANY INCOMPLETE INFORMATION.

SECTION VI. 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 QUALIFICATIONS SUBMITTAL.

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.

B. Small Business Enterprise Program

The Applicant shall complete and submit Attachment 12, the SBE Agreement. OCII has established a goal of 50 percent SBE participation on all construction, professional services, and supply contracts. OCII requires the Developer to perform extensive good faith efforts to include SBEs in the performance of any agreement resulting from this solicitation, and any subsequent agreements between Developer and its 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 selected Applicant to create joint ventures or similar partnership relationships among non-SBE consultants and contractors with San Francisco-based SBEs looking to build capacity and gain experience. In particular, 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.

In accordance with OCII policy, 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, 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. For further information see Attachment 12.

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 (including, as defined herein as the Developer, the Co-Developer, the Property Manager, the Services Provider, and Architect) 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. Insurance & Indemnification

Beginning at the time of selection and throughout the course of development of the Projects, the selected Applicant must procure and maintain insurance in accordance with OCII's policy, as the policy may be amended from time to time. Current insurance requirements are provided for reference as Attachment 20.

From the time of selection, the selected Developer team shall defend, 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.

SECTION VII. OCII DEPOSITS

Applicants are responsible for the following deposits, as well as any fees in connection to the required deposits:

A. Offer Deposit

An Offer to Negotiate Exclusively Deposit in the amount of One Thousand Dollars (\$1,000.00) made payable by check to the Office of Community Investment and Infrastructure is due at the time of qualifications submission. Applicants should include a copy of the check in their electronic submittal package and mail the check to:

Office of Community Investment and Infrastructure
Attn: Kim Obstfeld
Re: Mission Bay South Block 4 East RFQ
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

B. Performance Deposit (Selected Applicant Only)

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

SECTION VIII. ADDITIONAL TERMS & CONDITIONS

A. Selected Applicant'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, street lighting, curbs, gutters, street trees and sidewalks. The selected Applicant will be responsible for all transactional costs and

closing requirements, including, but not limited to, title insurance, escrow fees, parcel maps, etc. In addition, 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.

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 to [applicable law]."

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 Developers, 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 by OCII.

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, in collaboration with OCII as described in Section II.A.7 above. These reviews may include the requirements of CEQA and/or NEPA, 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. 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

The Applicant responding to this RFQ does so at its own expense. OCII will not consider any costs related to preparing the qualifications submittal or negotiating the development contract as reimbursable.

H. OCII Right to Modify or Suspend RFQ

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 RFQ and all or any portion of the contractor selection process in or subsequent to the RFQ; to obtain further information from any Applicant member, to waive any defects as to form or content of the RFQ or any other step in the selection process; to reject any and all responses submitted; to reissue the RFQ; 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 RFQ as to fees, scope of services, or any other aspect of the RFQ 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 RFQ, 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 RFQ, 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.

List of Attachments

To be included in 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 Developer 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 information purposes only:

Attachment 18:	Final Map Block 8711, Lot 029 (aka Block 4E)
Attachment 19:	OCII Block 4 East massing studies
Attachment 20:	OCII insurance requirements
Attachment 21:	Area Median Income 2023
Attachment 22:	Property Owner and Occupant Preference Program (Certificate of Preference Program)