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**REQUEST FOR PROPOSALS  
FOR DEVELOPMENT OF  
MIDDLEFIELD JUNCTION - PARCEL A**

Request Issued: July 10, 2018

Proposals Must be Received by 4:00 p.m. on

Monday, October 15, 2018

Proposals will not be accepted after this date and time

Interested vendors must register online with the County of San  
Mateo at [www.publicpurchase.com](http://www.publicpurchase.com)

Proposals must be submitted electronically to  
[www.publicpurchase.com](http://www.publicpurchase.com)

***Note regarding the Public Records Act:***

Government Code Section 6250 *et seq.*, the California Public Records Act (PRA), defines a public record as any writing containing information relating to the conduct of the public business. The PRA provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request For Proposals is a public record in its entirety. Also, all information submitted in response to this Request For Proposals is itself a public record **without exception**. Submission of any materials in response to this Request For Proposals constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by San Mateo County ("County") or its Department of Housing ("DOH") if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County and DOH for release of such information.

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<b>EXHIBITS: (Posted on <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>)</b>
Exhibit A - San Mateo County Childcare and Preschool Facilities Task Force
Exhibit B - Final Redwood City Childcare Needs Assessment – 2015 and 2025 – Supply and Demand Analysis
Exhibit C - Corner Record for the Site
Exhibit D - Phase 1 Environmental Site Assessment Report
Exhibit E - Phase 2 Environmental Site Assessment Report
Exhibit F - Site Plan
Exhibit G - Existing Conditions Memo
Exhibit H - BKF Utilities Report
Exhibit I - EPS Memo on New Markets Tax Credits for Childcare and Community-Serving Uses
Exhibit J – Smith Memo on New Markets Tax Credits for Homeownership
Exhibit K - Parcel A Summary – Middlefield Junction Master Plan
Exhibit L - Standard County Agreement with Contractors
<b>ATTACHMENTS: (Posted on <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>)</b>
#1 – RFP Submission Checklist
#2 – Proposer & Team Description
#3 – Comparable Projects Experience Form
#4 – Other Projects Experience Form
#5 – Developer Staffing Workload Form
#6 – Architect Staffing Workload Form
#7 – Property Management Experience Form
#8 – Resident Services Provider Experience Form
#9 – Disclosure Questions
#10 – Statement of Compliance / Certification Form

## **SECTION I: GENERAL INFORMATION**

### **A. STATEMENT OF INTENT**

The County of San Mateo through its Department of Housing (“County” or “DOH”) is seeking qualified and experienced developers to submit a description of their qualifications together with a conceptual proposal to develop affordable housing and community-serving uses, including a childcare facility (collectively “Project”), on the vacant, County-owned 3.2 acre parcel located in an unincorporated portion of the County at 2700 Middlefield Road, APN 054-113-140 (“Site”) in a manner that complements the newly-built Fair Oaks Health Center at 2710 Middlefield Road, is generally consistent with the North Fair Oaks Community Plan (“NFOCP”), and is generally consistent with the Middlefield Junction Master Plan for Parcel A (“Master Plan”).

The County expects to negotiate and sign successive 99-year ground leases with the selected Developer/Owner to transfer control of some or all portions of the Site corresponding to each phase of development, as the Developer/Owner achieves close of construction financing for that particular phase. The County will retain long-term ownership of the land, and unless specifically excepted, the selected Developer/Owner will own the improvements and manage the property.

Each proposal must:

- Be generally consistent with the goals and policies of the NFOCP, although it may vary to some extent in density and mix of uses.  
(<https://planning.smcgov.org/north-fair-oaks-community-plan>);
- Reference the preliminary work contained in the Master Plan for the Site prepared by Van Meter Williams Pollack and explain in detail the reasoning behind any material differences between the Master Plan and the proposal;
- Include at least 100 below-market rate affordable homes serving households of various sizes, ages, needs, and incomes, some portion of which may be homeownership opportunities;
- Include a ground floor childcare center of up to 12,000 sqft with appropriately-sized, dedicated outdoor space up to 8,000 sqft and short-term parking for child drop-off/pick-up;
- Include 3,000 to 12,000 sqft of additional ground-floor community-serving space, if feasible (the use of which shall be determined during community engagement process);
- Discuss how the Proposal will complement the existing community-serving uses at 2500, 2510, 2600 & 2710 Middlefield Road, including the Health Center, Community Center, Childcare Center, Adult Activity Center, Library and Human Services Agency;
- Include a detailed plan to lead a robust community engagement process, and to work closely with the County, other potential funders and potential tenants, to scope and design a fiscally feasible project that meets the community’s needs; and

- Include a detailed discussion of various funding strategies to maximize the leverage of public and private funding sources, including potential capital campaigns, partnerships and New Markets Tax Credits, if feasible.

Each Proposer's discussion of qualifications must describe the Proposer's experience:

- Designing, building, and managing mixed-use and mixed income projects of comparable size and complexity;
- Developing projects in the nine-county Bay Area;
- Developing childcare facilities;
- Developing other community-serving facilities such as wellness centers, community centers, senior centers, public meeting and event spaces etc.;
- Conducting multi-lingual community outreach in urban areas where existing residents are at risk of displacement;
- Staffing of comparable projects;
- Leveraging multiple sources of public, private, and philanthropic funding for comparable projects to minimize the need for local subsidies;
- Accessing the Affordable Housing and Sustainable Communities Program, if any (not required); and
- Accessing New Markets Tax Credits, if any (not required).

## ***B. OVERVIEW OF THE AREA***

The City of Redwood City ("Redwood City" or "RWC") is located in the Bay Area 25 miles south of San Francisco and about 27 miles north of San Jose. It encompasses an area of approximately 19 square miles and is the oldest city on the San Francisco Peninsula. The City was incorporated in 1867 and has served as the county seat of San Mateo County since 1856. The first occupants of the town were Native Americans from the Ohlone tribe. In the mid-eighteenth-century the first Europeans arrived and transformed the area into a farming and ranching community for Spanish colonists. In the 1840's, hundreds of Americans migrated westward in search of gold and land and once again there was transformation as Redwood City became the hub of a lumber shipping industry. Downtown grew into a vital center for commerce, government, and manufacturing in the early 20th Century, before declining in the 1960s and 1970s. During the late 1990s and early 2000s Downtown Redwood City began revitalizing, and this revitalization continues today. The population of the City is now 83,000 with 44% White and 38.8% Hispanic/Latino residents.

Redwood City is bordered by the unincorporated area called North Fair Oaks ("NFO") where the Site is located. North Fair Oaks is bounded by Redwood City to the north, west and southwest. North Fair Oaks is one of the oldest communities in San Mateo County, with settlement dating to the early 1850s. Much of the area was developed during two boom eras, one following the 1906 San Francisco earthquake and another occurring just before World War II. North Fair Oaks was originally part of a larger area known as Fair Oaks that included much of present day Atherton, but when Menlo Park and Atherton incorporated in 1923, the area between the two communities that is now North Fair Oaks remained unincorporated. North Fair Oaks initially developed as a largely suburban, low-density, single-family



residential community, not unlike adjacent parts of Atherton and Menlo Park, with transportation based primarily around the automobile. Over time, the area developed the more diverse range of land uses, resulting in the current mix of lower and higher density housing, commercial establishments, small- and large-scale industrial establishments, and various other uses.

Today, the population of North Fair Oaks is 14,687 (2010 US Census) with a diverse makeup of 73% Hispanic/Latino from Mexico and Central America and 19% White. Although unincorporated, the NFO neighborhood self-identifies as part of Redwood City. Redwood City residential neighborhoods seamlessly blend into residential neighborhoods located in North Fair Oaks. The Fair Oaks Library is part of the Redwood City library system. There are two Redwood City School District schools (Fair Oaks and Garfield) located in North Fair Oaks and two others (Hoover and Taft) serve both NFO and Redwood City residents. These are some of the lowest performing schools in the county, with large percentages of English language learners and families that qualify for free/reduced lunches.

The County of San Mateo works with Redwood City 2020 (a collaborative of eight public and non-profit organizations that serve youth and families living in RWC and NFO) to promote community engagement within NFO. San Mateo County has also hired an outreach team known as “North Fair Oaks Forward” to engage the North Fair Oaks community.

### ***C. OVERVIEW OF MASTER PLANNING ACTIVITIES***

In 2016, the County and Redwood City hired Van Meter Williams Pollack and Economic & Planning Systems to jointly explore the long-term feasibility of redeveloping 2500, 2510, 2600 & 2700 Middlefield Road in a manner that complements the newly built Fair Oaks Health Center at 2710 Middlefield Road and achieves economies of scale, while best serving the interests of the community regardless of jurisdictional boundaries.

This master planning process was led by an Executive Committee consisting of County Supervisor Warren Slocum, Redwood City Councilmember and former Mayor, John Seybert, Lee Michelson, the now retired President of the Sequoia Healthcare District, and representatives from the County and City Managers’ offices. The process was staffed by a Steering Committee with representatives from:

- The County’s
  - Department of Housing
  - Department of Planning and Building
  - Department of Public Works
  - Health System
  - Real Property Services Office
  - Sheriff’s Office

- The City's
  - Community Development Department
  - Department of Parks, Recreation and Community Services
  - Library
- The Sequoia High School District
- The Redwood City School District
- SamTrans

The following documents were reviewed during the master planning process:

- San Mateo County Child Care and Preschool Facilities Task Force Report (Exhibit A)
- Final Redwood City Child Care Needs Assessment – 2015 and 2025 – Supply and Demand Analysis (Exhibit B)
- Corner Record for the Site (Exhibit C)
- Phase 1 Environmental Site Assessment Report (Exhibit D)
- Phase 2 Environmental Site Assessment Report for the Site (Exhibit E)  
**WARNING: THE PHASE I ESA REPORT IS 756 PAGES & PHASE II IS 185 PAGES, SO PLEASE DO NOT PRINT UNLESS NECESSARY.**

The master planning process produced the following documents:

- Site Plan (Exhibit F)
- Existing Conditions Memo (Exhibit G)
- BKF Utilities Report (Exhibit H)
- EPS Memo on New Markets Tax Credits for Childcare and Community-Serving Uses (Exhibit I)
- Smith Memo on New Markets Tax Credits for Homeownership (Exhibit J)
- Parcel A Summary – Middlefield Junction Master Plan (Exhibit L)

Development of the Site was determined, through the master planning process, to be the near-term priority as it is currently vacant and is the most fiscally feasible site to address the community's pressing need for affordable housing, childcare, and perhaps additional community-serving uses. The existing buildings at 2500, 2510 & 2600 Middlefield Road which house the Fair Oaks Community Center, the Fair Oaks Library, and the County's Human Services Agency offices are not currently under consideration for redevelopment.

Van Meter Williams Pollack created the Master Plan for the Site which includes three potential alternative configurations of affordable housing, childcare, and other generic community-serving space. Costs were estimated for each of the three alternatives to serve as a starting point for discussion with potential developers responding to this RFP. Van Meter Williams Pollack shall not be an "eligible architect" for the purposes of responding to this RFP, but will be available to answer questions at the Proposers Information Conference.

All proposals shall reference the Master Plan, but need not be bound by it. Material differences between the Master Plan and proposals must be explained. The successful

Proposer will be responsible for leading a robust community engagement process to inform the final scoping and design of a fiscally feasible project that meets the Community's needs.

#### **D. OVERVIEW OF THE SITE**

*The following overview is provided for informational purposes only to assist potential Proposers in responding to this RFP. The information contained herein may change over time and includes information from numerous external sources. This is not to be construed as tax, legal, or accounting advice.*

##### **Site Description**

The Site that is the subject of this RFP consists of approximately 3.2 acres of vacant land located at 2700 Middlefield Road, Redwood City, California 94063 (APN 054-113-140). See Site Plan below and Exhibit F for a larger version of the same. The Site is owned by the County and is located in North Fair Oaks, an unincorporated portion of the County.



The Site is located directly behind the 36,000-square foot Fair Oaks Health Center (“Health Center”) built in 2013 at 2710 Middlefield Road (APN 054-113-130, not to be redeveloped). The County currently leases the property where the Health Center is situated.

The Site and the Health Center are situated in a semi-circular area that is bounded by the curved Southern Pacific Railroad Dumbarton Spur (“Dumbarton Spur”) and abuts the rear of single family residences and small apartment buildings on Pacific Avenue. Pacific Avenue dead ends at the convergence of the Hetch Hetchy Aqueduct and the junction of the Caltrain tracks and the Dumbarton Spur.

The Site, the Health Center, and a large light industrial park known as Redwood Junction share a single access point (“Shared Driveway”). The Shared Driveway intersects with Middlefield Road at a complex, unsignalized intersection with a railroad crossing near Pacific Avenue, Northside Avenue, and Hurlingame Avenue. The intersection is referenced in the North Fair Oaks Community Plan (“NFOCP”) as a potential location for a multi-modal transit hub.

### **North Fair Oaks Community Plan (“NFOCP”)**

The NFOCP was created in 2011 as a general plan for the North Fair Oaks unincorporated area. It establishes goals and policies for land use, housing, health and wellness, parks and recreation, circulation, and infrastructure for North Fair Oaks. The NFOCP designates the Middlefield Junction area as “Commercial Mixed Use,” a land use category that anticipates a mix of varied commercial and residential development at densities of 60 to 120 units per acre and building heights of up to approximately six stories. The NFOCP is available at <http://planning.smcgov.org/documents/north-fair-oaks-community-plan>.

The County is implementing the policies of the NFOCP in a variety of ways, including, but not limited to, improvements to infrastructure and public facilities, enhanced services, and zoning updates.

### **Zoning**

A key implementation step of the NFOCP is rezoning specific targeted areas to facilitate the types of development envisioned by the NFOCP. The Middlefield Junction parcels and surrounding areas are envisioned as key sites for significantly increased residential and commercial development, as well as expanded community-serving facilities. The planned rezoning of this area, the final of four phases of rezoning in North Fair Oaks, will allow and encourage residential and commercial mixed-use development at significantly greater densities and intensities than currently allowed, with heights up to roughly 70 feet, and residential densities up to 120 units per acre. However, development of the Project Site at densities greater than that allowed under the Community Plan may be desirable, in which case a separate rezoning may be required, as discussed in the Section titled “Project Size” below.

### **Middlefield Road Redesign and Improvements Project**

The NFOCP includes the County’s vision for the Middlefield Road Redesign and Improvements Project to improve connectivity and reduce mobility barriers for all types of travel, including pedestrian, bicycle, automobile, and public transit; improve area health and safety by increasing walkability and bikeability; and improve travel and transit connection between North Fair Oaks, surrounding communities, and the region. This vision was further defined with the completion of a bilingual community outreach campaign in 2014 which entailed conducting surveys and distributing posters and flyers, as well as open communication with community members during several community



meetings. Through that effort, key elements of the redesign were defined including reconfiguring Middlefield Road to a 3-lane roadway (one lane in each direction with a center left turn lane) with parallel parking, bike lanes, and wider sidewalks. The expanded sidewalk space will accommodate site amenities such as benches, landscaping, street lights, trash receptacles, street art, public spaces, wayfinding signage, and low impact development. In addition, the project involves undergrounding of overhead utilities within the project area. The streetscape project limits are from 5th Avenue to Pacific Avenue.

A Union Pacific Railroad (UPRR)-maintained, at-grade crossing owned by Caltrain is located between Pacific Avenue and Northside Avenue. The tracks cross Middlefield Road at an angle in the vicinity where several driveways and roadways connect to Middlefield Road (“Shared Driveway”). The Shared Driveway immediately south and west of the tracks serves the Health Center, which is located on private property. This driveway also provides access to several other parcels, including the Site and the Redwood Junction light industrial park via an access roadway which is situated within an easement.

The Dumbarton Spur is an active rail corridor with the tracks being used approximately twice per month. The feasibility of potential Dumbarton Transportation Corridor improvements is currently being studied. See:

- Dumbarton Transportation Corridor Study  
[http://www.samtrans.com/Planning/Planning\\_and\\_Research/DumbartonTransportationCorridorStudy.html](http://www.samtrans.com/Planning/Planning_and_Research/DumbartonTransportationCorridorStudy.html)
- Public Private Partnership to explore feasibility of Dumbarton Transportation Corridor improvements  
<https://www.railwayage.com/passenger/facebook-putting-a-face-on-rail-transit/>
- Regional Measure 3 <https://mtc.ca.gov/tags/regional-measure-3>

Improvements are also underway on the nearby Caltrain tracks including electrification and consideration of a high-speed rail and Caltrain blended system. See:

- Caltrain Modernization Project, including Peninsula Corridor Electrification  
<http://www.caltrain.com/projectsplans/CaltrainModernization/Modernization/PeninsulaCorridorElectrificationProject.html>;
- High Speed Rail/Caltrain Blended System  
[http://www.hsr.ca.gov/Programs/Statewide\\_Rail\\_Modernization/Project\\_Sections/sanfran\\_sanjose.html](http://www.hsr.ca.gov/Programs/Statewide_Rail_Modernization/Project_Sections/sanfran_sanjose.html)

The Middlefield Road Redesign and Improvements Project (“Road Project”) proposes improvements to the streets and driveways in the vicinity of the Site to improve clarity for turning movements and reduce potential for conflicting vehicle movements in the area and/or stranding of vehicles on the tracks. The Road Project, will include the construction of a coordinated traffic signal system for Hurlingame Avenue, the railroad crossing, Pacific Avenue, and the Shared Driveway. The Road Project will begin in the spring of

2019 with a 12-15 month duration. No pavement cuts will be allowed for three years after conclusion of the Road Project.

In 2013 the adjacent private property owner constructed the Shared Driveway and the Health Center. The improvements constructed by the private property owner within the easement and near the at-grade crossing were not authorized by the CPUC through General Order (GO) 88-B; thus, the CPUC requires several modifications including:

- Relocating the Shared Driveway away from the railroad tracks and relocating the Health Center signage
- Modifying raised medians at the Shared Driveway and thus, the private property traffic circulation pattern
- Replacing and relocating track signal equipment as well as curbs
- Re-striping the Shared Driveway
- Restricting turning left movements in and out of Northside Avenue
- Signalizing the Shared Driveway access with railroad preemption (connectivity between the signal at the Shared Driveway with the railroad signal)

The Project proponent is the County of San Mateo. The Project is currently in the design phase and construction is anticipated for early 2019.

### **Water, Sewer & Fire**

The Site is serviced by:

- a. California Water Service Company <https://www.calwater.com/about/district-information/bg/>.
- b. Fair Oaks Sewer Maintenance District <https://lafco.smcgov.org/fair-oaks-sewer-maintenance-district>; and
- c. Menlo Park Fire Protection District <https://www.menlofire.org/>.

### **Site History**

The County purchased the Site in 2014 with an access easement across and around the Health Center's parcel. Historically, the Property had been used for light industrial purposes. According to the Phase 1 Environmental Site Assessment commissioned by the County prior to acquisition of the Property (Exhibit D), some of the prior uses included a recycling center that stored, bulked, and transferred hazardous waste and a distribution facility for Coors West. At the time of acquisition, the Property was improved with a 38,887 square foot warehouse and office facility which has since been demolished. The site has been covered with gravel and is not being utilized for any purpose. Due to the historical uses, at the time of acquisition, the County also commissioned a Phase 2 Environmental Site Assessment (Exhibit E).

**WARNING: THE PHASE I REPORT IS 756 PAGES & THE PHASE II REPORT IS 185 PAGES, SO PLEASE DO NOT PRINT UNLESS NECESSARY.**

ACC Environmental Consultants ("ACC") conducted both Environmental Site Assessments and found the following:

### **ACC's ESA Phase I Conclusions (July 24, 2014)**

We have performed a Phase I Environmental Site Assessment in conformance with the scope and limitations of ASTM Practice E 1527-13 of 2700 Middle Field Road in Redwood City, California, the property. Any exceptions to, or deletions from, this practice are described in Section 5.1 of this Report.

This assessment has revealed evidence of two (2) Recognized Environmental Conditions at the subject property:

ACC observed railroad tracks adjacent to the west, and south of the subject property. Railroad tracks often contain contamination related to the maintenance of tracks and spilled or leaking liquids relating to combustion or transportation of hazardous materials. Contaminants most often encountered include fuel petroleum hydrocarbons, cleaning solvents and detergents, herbicides, fossil fuel combustion products (PAHs), arsenic, and mercury. **The likely presence of contamination related to railroad tracks at the subject property is considered a REC.**

ACC observed several gasoline cans being stored on the exterior of the Chemical Storage Shed. There was obvious signs of significant staining indicative of a release. **The release of hazardous materials to the asphalt-paved parking lot in an area with visible cracks is interpreted to be a REC.**

This assessment has revealed evidence of one (1) Controlled Recognized Environmental Condition at the subject property:

The EDR database Report and historical Phase I ESA indicated that two doubled walled fiberglass Underground Storage Tanks (USTs) were installed at the subject property in 1980. These USTs underwent tank tightness testing in 1990 and failed. It was noted that the inventory reconciliation did not show and discrepancies in the level of fuel. An unauthorized release report was filed on October 31, 1990. Operation of the system was stopped until additional testing could be conducted. In December of 1990 the system passed the tank tightness test. A leaking dispenser was found during an inspection in May of 1991 and was subsequently repaired. The UST system was upgraded in 1998 to comply with the new State regulations. The USTs were removed from the ground in October 2010 under the supervision of the San Mateo County Department of Environmental Health. The County issued a no further action letter related to the UST removal. However, this no further action letter states that changes in the present or proposed use of the site may require further site characterization and mitigation activity. **Based on this information the former presence of USTs at the subject property is interpreted to be a Controlled Recognized Environmental Condition.**

This assessment has revealed evidence of one (1) Business Environmental Risk (BER) at the subject property:

Based on the information reviewed it appears that the subject property is located in an area that was historically used for industrial purposes (beverage distributor and recycling center). In addition, a railroad track is located immediately adjacent to the western side of the subject property. Soil and groundwater at the subject property and in the immediate vicinity of the subject property may be contaminated with petroleum hydrocarbons, heavy metals, or other contaminants associated with the industrial uses of the subject property. With the exception of the removed two 10,000-gallon underground storage tanks, there has been no unauthorized release or contamination requiring remedial action. The subject property is currently occupied entirely by several structures and asphalt paved parking lots, mitigating the potential for exposure to soil and groundwater contamination. Should the site undergo redevelopment and soil or groundwater are disturbed, characterization of potential contamination at the subject property is recommended. **The potential for impacted soil and groundwater at the subject property due to historical industrial purposes is interpreted to be a BER.**

Specific records should be maintained to preserve potential CERCLA defense and liability protection. The relative importance of record keeping depends on whether the User is a Prospective Purchaser, Lending Institution, or Seller.

#### **ACC's ESA Phase II Discussion, Recommendations, Potential Investigation and Cleanup Costs (November 21, 2014)**

**Discussion:** Based on the soil sampling conducted to date shallow soils (<3 meters) in the vicinity of the railroad tracks are impacted with TPH as diesel, TPH as motor oil, cadmium and zinc above their respective risk based screening levels. The highest impacted area was in SS-1, near the hazardous materials shed on the subject property.

Acetone was detected in samples SB-7 and SB-8 near the surface staining. However, since no other VOCs were detected it is likely that the acetone detected is a laboratory artifact. Although elevated levels of metals were detected in the groundwater sample at SB-5, it is likely that these metals are more indicative of soil conditions rather than environmental impact.

**Recommendations:** Based on the finding of this investigation ACC recommends the following:

- "Additional surface sampling could be conducted in the vicinity of the railroad tracks to determine the extent of the surface soil impacts. However, it appears that the railroad tracks are may not be on the subject property. It



is recommended that the location of the Railroad tracks be surveyed to evaluate if they are on the subject property.”

- “The limited impacted soil associated with SS-1, which was collected on what appears to be the very edge of the subject property could easily be removed and disposed during any potential redevelopment and onsite grading.”

**Additional Investigation and Site Delineation Potential Costs:** At the County of San Mateo’s request ACC is providing very general cost estimates for typical investigation and cleanup costs. These costs are a very general estimate and can be further pinpointed once the full extent of contamination is delineated and the source is identified.

**Soil Removal Costs and Soil Verification Sampling:** Potential soil removal and verification sampling costs would range from \$7,000 to \$9,000, depending on waste disposal facility acceptance.

See Exhibits E and F for the complete Environmental Site Assessment reports.  
**WARNING: THE PHASE I REPORT IS 756 PAGES & THE PHASE II REPORT IS 185 PAGES, SO PLEASE DO NOT PRINT UNLESS NECESSARY.**

#### ***E. MASTER PLAN – PARCEL A (“SITE”)***

##### **Background Review**

An Existing Conditions Memorandum (Exhibit G) was produced by Van Meter Williams Pollack detailing current uses by the Human Services Agency (“HSA”), the Fair Oaks Branch Library (“Library”), the Fair Oaks Community Center (“FOCC”), the Redwood City Child Development Program (“RCCDP”) and Fair Oaks Health Center (“Health Center”) and potential future growth was predicted by each of these entities.

Childcare needs assessment reports for both the County and the City (Exhibits A and B) were reviewed and revealed a projected shortfall of 350 infant spaces, 800 preschool spaces and 600 school age spaces in Redwood City by 2025. Representatives were interviewed from First 5 San Mateo County, the Childcare Coordinating Council of San Mateo County and Redwood City’s Childcare Coordinator. The project was also presented, and well-received, at the “Childcare Solutions Convening and Hackathon” event hosted by Redwood City 2020.

The North Fair Oaks Community Plan (“NFOCP”) was reviewed which, among other things, prioritizes housing for large households, accessible and affordable senior housing, other special needs housing, affordable rental and ownership housing and transit-accessible housing. The NFOCP sets forth a number of policies to increase affordable housing options including, but not limited to, adopting and enhancing supportive land use and zoning policies and implementing parking reductions appropriate for the actual needs of new projects.

A preliminary utility feasibility review detailing capacity and constraints for the Site was conducted by BKF, the same civil engineering firm that worked on the development of the Health Center (Exhibit H). The Fair Oaks Sewer Maintenance District (District) does not have excess sewer treatment capacity to serve this development. The developer will need to either offset the volume of total sewage discharge into the system from the development by performing sewer main replacement(s) within the District to offset an equal volume of Inflow/Infiltration (I/I), or purchase additional sewage capacity from the City of Redwood City.

The length of sewer main the developer would need to replace or additional sewage capacity that will need to be purchased will not be known until a final development proposal is submitted that defines the number of and types of units/uses, and total water use for the development that will enter the sanitary sewer system. The Middlefield Road Redesign and Improvements Project ("Road Project") will begin in the spring of 2019 with a 12-15 month duration and is expected to affect the section of Middlefield Road near the Shared Driveway. If the pavement is cut, a full-width slurry seal, block to block within the affected area will be required. No pavement cuts will be allowed for three years after conclusion of the Road Project.

The Project will also need to comply with current Regional Water Quality Control Board's Municipal Regional Stormwater Permit requirements.

## **Consultations**

Project teams from the County's Department of Public Works were consulted to coordinate upcoming neighborhood improvements including the Road Project which includes undergrounding of nearby utilities and the signalization of the intersection of Middlefield Road & the Shared Driveway that provides the only access point for the Site, the Health Center and Redwood Junction, a large-light industrial park. See discussion above for more detail.

Project teams from the County's Department of Planning and Building were consulted to coordinate the timing of the upcoming rezoning of the area to encourage mixed-use development along Middlefield Road. Development of the Project Site at densities greater than that allowed under the Community Plan may be desirable, in which case a separate rezoning may be required, as discussed in Section titled "Project Size" below.

Staff of the Health Center were consulted regarding the suitability of their existing space. It would be desirable to have external meeting space to accommodate up to 100 persons, but they have no plans to expand at this time.

The County's Health System staff was also consulted and indicated that it may be desirable to consider a wellness center and/or community living room with commercial/demonstration kitchen inspected by Environmental Health Services for food safety. The County's Health System may also be interested in relocating its current Women, Infants & Children ("WIC") program from 2342 El Camino Real, Redwood City,

where they are currently renting 2,489 square feet at \$39 per square foot to Middlefield Junction. There may also be some interest in adding space for behavioral health services

Economic & Planning Systems was consulted throughout the planning process to analyze costs and potential funding sources for the various uses under consideration and produced a memorandum on the possible use of New Markets Tax Credits to support a childcare facility and other community serving uses at the Site. (Exhibit I)

SmithNMTC Associates, LLC was consulted and produced a memorandum on the possible use of New Markets Tax Credits to support the construction of homeownership units. (Exhibit J)

### **Alternatives & Cost Estimates for Parcel A**

Van Meter Williams Pollack developed a Master Plan for the Site (Exhibit K) that includes three potential configurations of buildings with detailed cost estimates for a mixed-use project containing:

- **Affordable housing:** +/-130 units;
- **Childcare:** a facility of up to 12,000 sqft with up to 8,000 sqft of dedicated outdoor space and short-term parking for child drop-off/pick-up;
- **Potential community-serving commercial space:** up to 12,000 sqft.

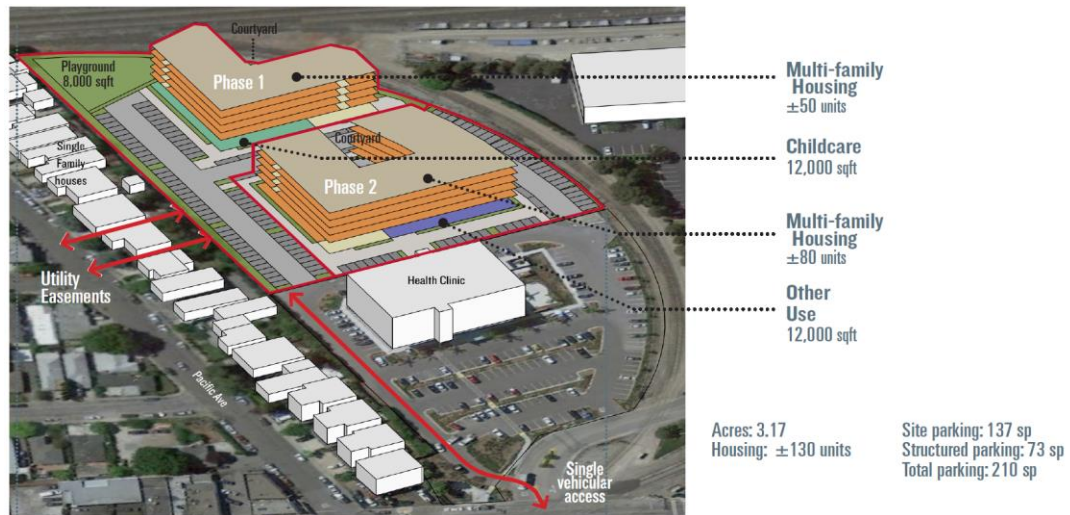
The three Alternatives discussed in detail in the Master Plan are intended only as a starting point for discussion and are presented in no particular order. Proposals must reference this work, but can differ from it if the proposal contains a detailed discussion of the reasoning behind material differences.

### **ALTERNATIVE ONE**

Alternative One is a two-phase development that would include the childcare center, the community-serving commercial space and **approximately 130 multi-family housing units at a total project cost of approximately \$126 million** broken down as follows:

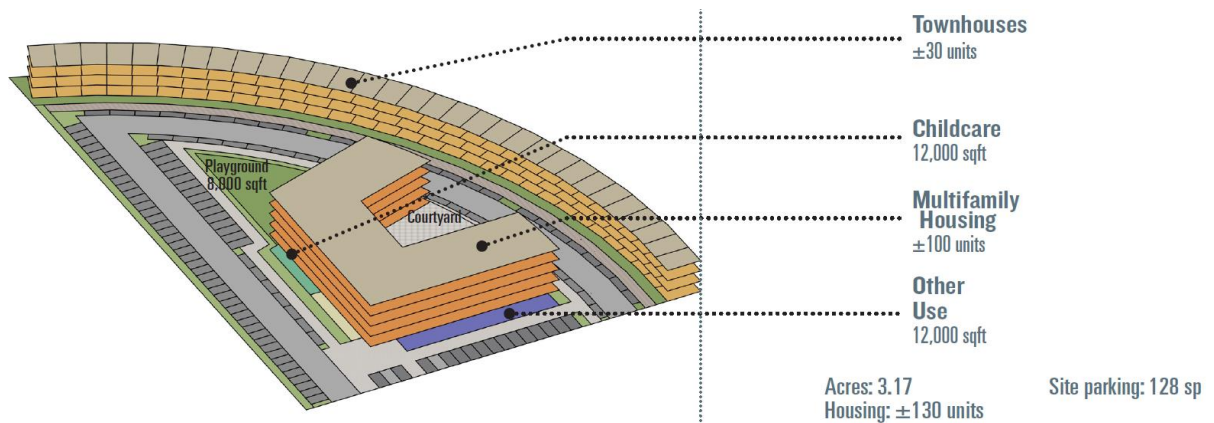
- **Phase One** would include approximately 50 units of multi-family housing and the childcare center at a cost of approximately \$55 million, to be occupied in approximately 5 years;

- **Phase Two** would include approximately 80 units of multi-family housing and the community-serving commercial space at a cost of approximately \$71 million, to be occupied in approximately 6 years.



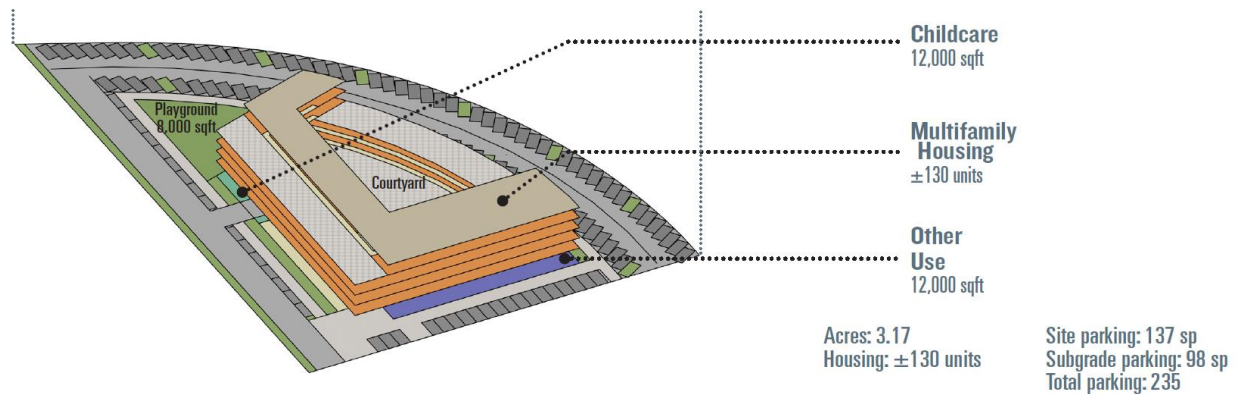
## ALTERNATIVE TWO

Alternative two is a single-phase development of the childcare center, the community-serving commercial space. **It contains approximately 100 multi-family housing units and approximately 31 townhouses at a total project cost of approximately \$113 million with occupancy in approximately 5 years.**



## ALTERNATIVE THREE

Alternative three is a single-phase development that maximizes the use of surface parking. It includes the childcare center, the community-serving commercial space, and **approximately 130 multi-family housing units for a total project cost of approximately \$124 million with occupancy in approximately 5 years.**



### Nearby Public Facilities (not to be redeveloped at this time)

2500, 2510 & 2600 Middlefield Road are located on contiguous parcels not to be redeveloped. They are near 2700 & 2710 Middlefield Road (the Site & the Health Center), but are separated by three smaller privately-owned properties and an at-grade railroad crossing. All of the existing uses at 2500, 2510, 2600 & 2710 Middlefield Road are public serving (see discussion below) and tenants frequently cross-refer clients. These buildings are public centers of the community providing a diverse spectrum of vital services and all proposals must discuss how the proposed uses at the Site would complement these existing uses.

### *2710 Middlefield Road – Fair Oaks Health Center*

The Fair Oaks Health Center (“Health Center”) is located between the Site and Middlefield Road. (<http://www.sanmateomedicalcenter.org/content/FOHC.htm>) The Health Center is privately owned and leased by the County. It opened in 2013 and provides:

- Primary care - adults and children
- Women’s health - OB/GYN
- Podiatry
- Optometry
- Dental services for adults and children
- Mental Health Services
- On-site Laboratory and Pharmacy
- Community Resources - Nutrition education, health education



***2600 Middlefield Road - The Fair Oaks Community Center, Early Learning Center and Adult Activity Center***

The Fair Oaks Community Center (“Community Center”) (<http://www.redwoodcity-docs.org/parks/cc/fairoaks.html>) is co-located with the Redwood City Child Development Program (“RCCDP”) (<http://rccdp.org/>) and with the Fair Oaks Adult Activity Center (“FOAAC”) operated by Peninsula Family Service. (<https://www.peninsulafamilyservice.org/our-programs/older-adult-services/fairoaks/>).

RCCDP has served the community in the same location since 1986. RCCDP is the only subsidized childcare and early learning facility in Redwood City that serves children under two years of age. RCCDP pays no rent and 90% of its budget comes from the State. RCCDP currently has 15 staff members serving 20 toddlers and 59 preschoolers from 7:00 a.m. to 5:30 p.m. RCCDP has 257 families on its waitlist, some with multiple children. Star Vista provides mental health services on a weekly basis at RCCDP.

Peninsula Family Service took over operation of the FOAAC older adult program at the Community Center in 2000 and operates rent-free at that location. Over the years, they have expanded services to meet the ongoing and emerging needs of older adults looking to maintain their health, independence, and quality of life. Last year, they helped more than 3,000 participants age in place by offering nutritious meals, fitness classes, health screenings, and social activities for free or reduced costs. They supplement their programs with complementary services by connecting participants with community resources including Redi-Wheels and Meals on Wheels.

The Community Center is one of the County’s eight Core Service Agencies and is a vibrant hub of activity for residents of all ages. Services are available in Spanish and English. It provides office space to many non-profits and coordinates a vast array of activities and services including:

- Childcare and Pre-School
- Crisis Intervention
- Education
- Emergency Food
- Shelter
- Holiday Food and Toy/Book Programs
- Housing Assistance
- Immigration and Citizenship
- Information and Referral
- Legal Services including Housing & Employment
- Senior Services including lunch program and computer classes
- Translation and Forms Assistance
- Daily Zumba Classes

- Tax Assistance Clinics and
- Facility rentals.

Agency partners providing services at the Community Center include:

- Al-Anon
- Community Education Center
- Community Overcoming Relationship Abuse (CORA)
- Community Resource Project
- El Concilio of San Mateo County/Nuestro Canto de Salud
- Human Investment Project (HIP Housing)
- International Institute of the Bay Area
- Legal Aid Society of San Mateo County
- Narcotics Anonymous
- Peninsula Family Service
- Peninsula Humane Society
- Peninsula La Raza Lawyers
- Redwood City Child Development Program
- Sandwiches on Sunday (SOS)
- San Mateo County Juvenile Probation
- San Mateo County Mobile Health Van
- San Mateo County Victim Center
- St. Vincent de Paul Redwood City Homeless Conference
- Second Harvest Food Bank
- Vision y Compromiso: Network of Community Promoters

***2500 Middlefield Road – County Human Services Agency Office (“HSA”)***

HSA administers a variety of public assistance programs to help residents obtain health care, shelter, food and other resources. Staff assists residents with enrollment in plans under the Affordable Care Act, Medi-Cal and Advanced Premium Tax Credit health insurance programs. They also help residents access nutrition assistance through CalFresh EBT cards, homeless services, veterans’ services, California Work Opportunity and Responsibility to Kids benefits (“CalWORKS”), Cash Assistance Programs for Immigrants (“CAPI”) and rent and utilities assistance for legal non-citizens who are seniors or disabled.

HSA also provides a broad spectrum of children and family services. HSA staff helps residents access the Child Protective Services program, Family Resource Centers, the Foster Care Program, adoptions, childcare, kinship support, youth services, safe baby surrender, domestic violence shelters and Emergency Safety Net Assistance (“COREs”). <http://hsa.smcgov.org/>

### ***2510 Middlefield Road – Redwood City Fair Oaks Branch Library***

The Fair Oaks Branch Library (“Library”) is housed within the HSA building on Middlefield Road. It was recently renovated to allocate approximately an additional 600 square feet of HSA's space to the Library's original 3,200 square feet. The Library provides a variety of activities for community members of all ages, with a large focus on the needs of children in the community. Weekly early literacy programming includes story times and craft programs, with a number of cultural celebrations throughout the year as well. The Library works closely in partnership with local elementary schools and preschools, and regularly hosts class visits. During summers, the Library hosts an intensive summer camp that provides enrichment activities and hot meals for young students and family members.

The Library also serves as a community technology hub, not only providing wireless internet access and desktop computers with office productivity software, but also mobile devices for home checkout. The Library also provides a bilingual collection of books, DVDs, and other items for checkout, although it relies heavily on the Downtown Library for specific items due to limited space for materials.

<http://www.redwoodcity.org/departments/library>

### **F. SUPPORTING RESOURCES**

Proposers should have a working knowledge of all of the following:

- a. The County’s North Fair Oaks Community Plan (“NFOCP”),  
<http://planning.smcgov.org/documents/north-fair-oaks-community-plan;>
- b. Build Up SMC, an initiative designed to grow and improve the supply of child care and preschool facilities in San Mateo County,  
<https://sites.google.com/view/buildupsmc/home;>
- c. NFO Forward, <http://infoforward.org;>
- d. The North Fair Oaks Community Council, <http://bnc.smcgov.org/north-fair-oaks-community-council;>
- e. The Middlefield Road Redesign and Improvements Project, including signalization of Health Center entrance, <https://cmo.smcgov.org/north-fair-oaks-middlefield-road-redesign-community-improvements-san-mateo-county-public-works;>
- f. The County’s Affordable Housing Impact Fee,  
<https://planning.smcgov.org/documents/affordable-housing-impact-fee;>
- g. The Sequoia Healthcare District, [http://www.sequoiahealthcaredistrict.com/;](http://www.sequoiahealthcaredistrict.com/)
- h. Caltrain Modernization Project, including Peninsula Corridor Electrification,  
[http://www.caltrain.com/projectsplans/CaltrainModernization/Modernization/PeninsulaCorridorElectrificationProject.html;](http://www.caltrain.com/projectsplans/CaltrainModernization/Modernization/PeninsulaCorridorElectrificationProject.html)



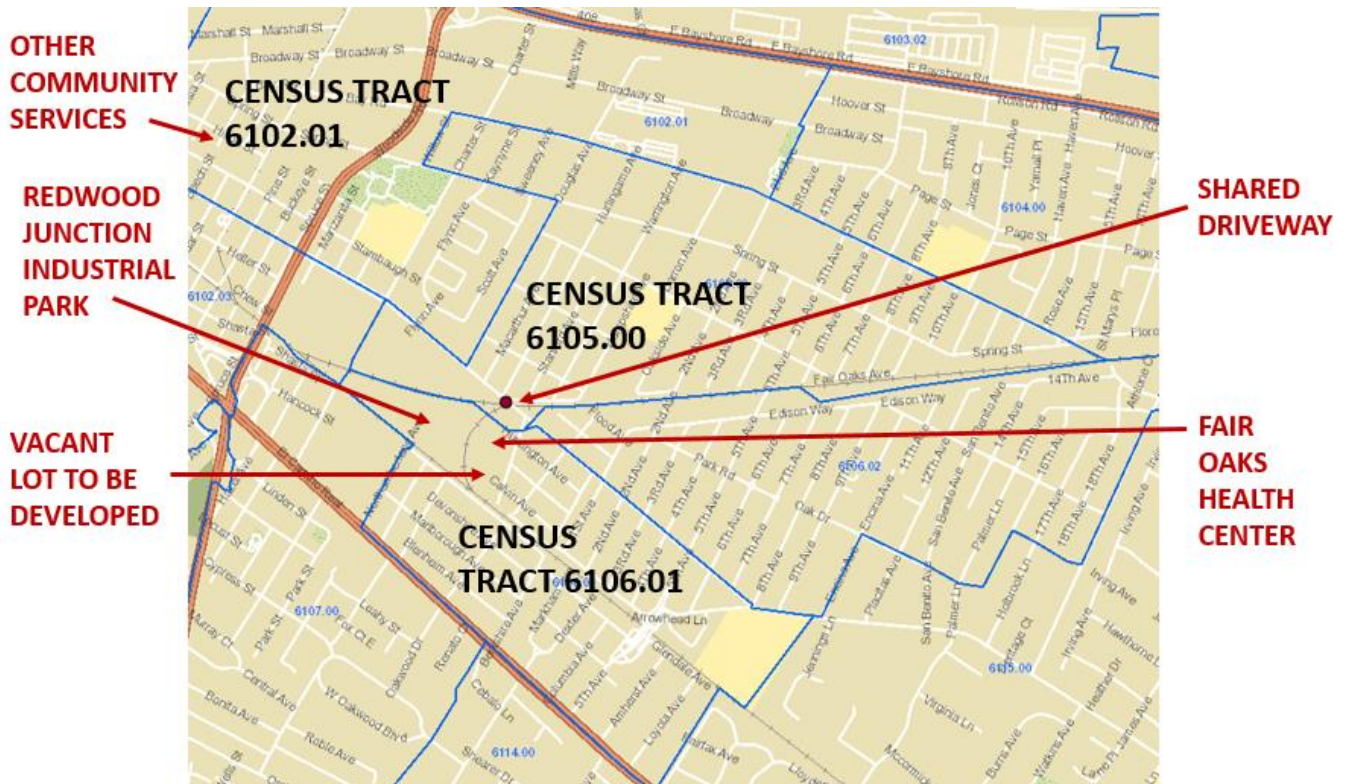
- i. High Speed Rail/Caltrain Blended System, [http://www.hsr.ca.gov/Programs/Statewide\\_Rail\\_Modernization/Project\\_Sections/sanfran\\_sanjose.html](http://www.hsr.ca.gov/Programs/Statewide_Rail_Modernization/Project_Sections/sanfran_sanjose.html);
- j. Dumbarton Rail Corridor March 3, 2006 Environmental Phase 1 Alternatives Analysis and Project Purpose and Need, <http://www.smcta.com/AssetFactory.aspx?did=3584>;
- k. Dumbarton Transportation Corridor Study, [http://www.samtrans.com/Planning/Planning\\_and\\_Research/DumbartonTransportationCorridorStudy.html](http://www.samtrans.com/Planning/Planning_and_Research/DumbartonTransportationCorridorStudy.html);
- l. Public Private Partnership to explore feasibility of Dumbarton Transportation Corridor improvements, <https://www.railwayage.com/passenger/facebook-putting-a-face-on-rail-transit/>;
- m. Regional Measure 3, <https://mtc.ca.gov/tags/regional-measure-3>;
- n. RWC's Community Benefits Program ("Partnership Redwood City"), <http://www.redwoodcity.org/business/partnership-redwood-city>;
- o. RWC's Blueprint for the Future, <http://www.redwoodcity.org/departments/community-development-department/planning-housing>;
- p. Redwood City 2020, <http://www.rwc2020.org/>;
- q. Redwood Village Community Association, <http://www.redwoodcity.org/residents/neighborhoods/neighborhood-associations/redwood-village>;
- r. Friendly Acres Community Association, <http://www.redwoodcity.org/residents/neighborhoods/neighborhood-associations/friendly-acres>;
- s. Fair Oaks Sewer Maintenance District, <https://lafco.smcgov.org/fair-oaks-sewer-maintenance-district>;
- t. Menlo Park Fire Protection District, <https://www.menlofire.org/>; and
- u. California Water Service Company, <https://www.calwater.com/about/district-information/bq/>.

## **G. FEDERAL, STATE, REGIONAL & LOCAL DESIGNATIONS**

### **Census Tracts**

The FFIEC Geocoding/Mapping System that is used by the California Tax Credit Allocation Committee ("TCAC") to locate census tracts shows the location of 2700 Middlefield Road at the intersection of the Shared Driveway and Middlefield Road in Census Tract 6105.00. However, the vacant lot to be developed under this RFP appears to be physically located in adjacent Census Tract 6106.01 (collectively "Site Census Tracts").

<https://geomap.ffiec.gov/FFIECGeocMap/GeocodeMap1.aspx>



### SADDA & QCT

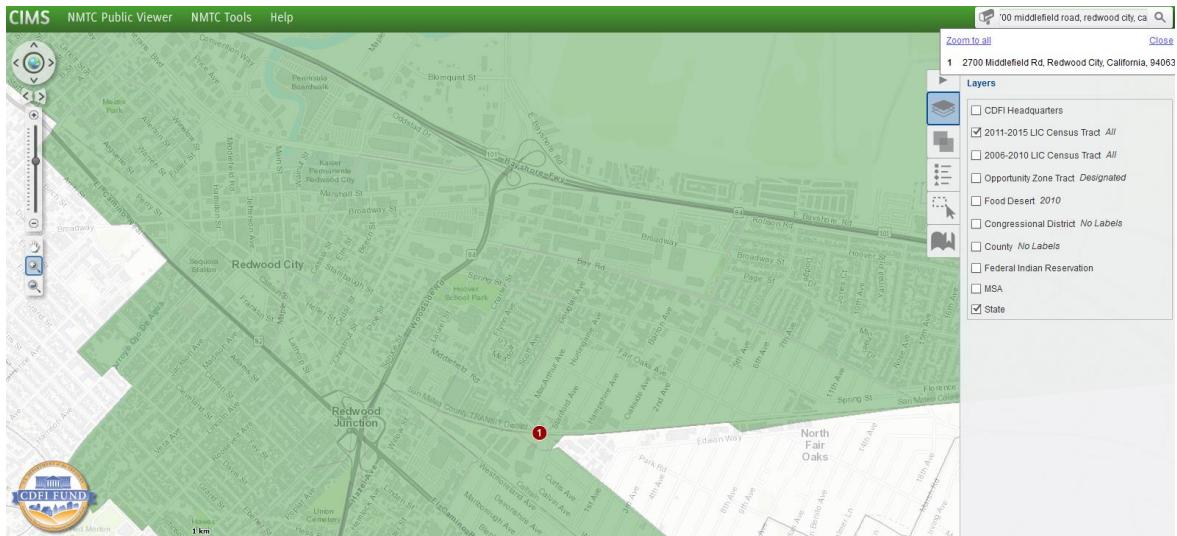
According to HUDUser (HUD's online data tool), both Site Census Tracts, and the adjacent tract containing existing community-serving uses (6102.01), are designated by HUD as Small Area Difficult to Develop Areas and as Qualified Census Tracts for 2018: [https://www.huduser.gov/portal/sadda/sadda\\_qct.html](https://www.huduser.gov/portal/sadda/sadda_qct.html)

### PDA & TPA

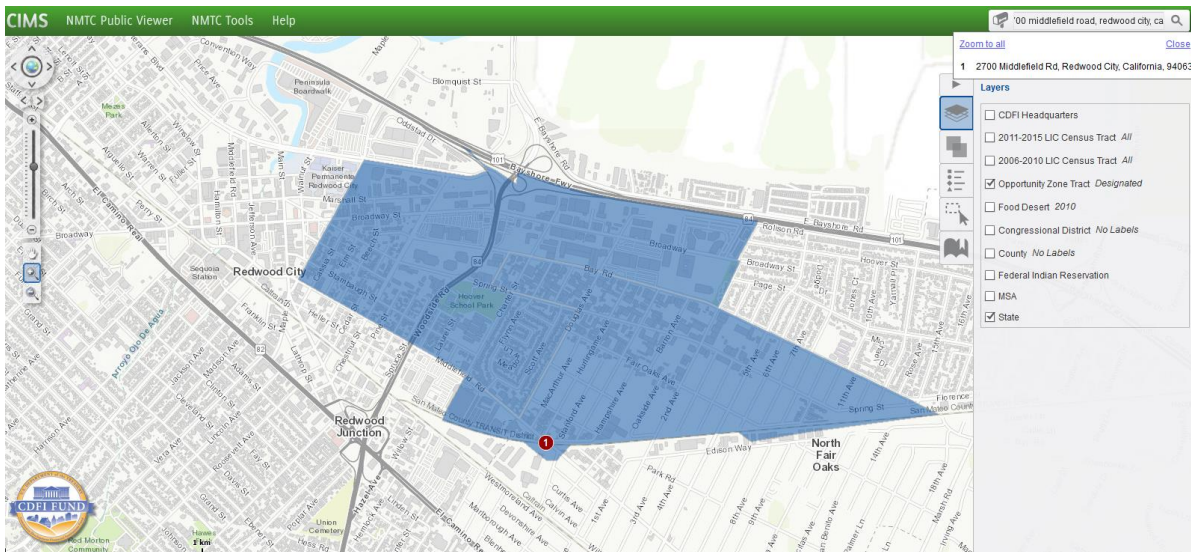
Both Site Census Tracts, and the adjacent tract containing existing community-serving uses (6102.01), are located in a Priority Development Area and both are located in a Transit Priority Area in Plan Bay Area 2040. *(Please note that the Bay Area Metro online mapping tool incorrectly omits the PDA designation.)*

### NMTC & Opportunity Zone

According to the U.S. Treasury's online tool, both Site Census Tracts, and the adjacent tract containing existing community-serving uses (6102.01), qualify for New Markets Tax Credits. [https://www.cims.cdfifund.gov/preparation/?config=config\\_nmtc.xml](https://www.cims.cdfifund.gov/preparation/?config=config_nmtc.xml),



However, the same online tool indicates that only Census Tract 6105.00 (with the Shared Driveway) and the adjacent tract containing existing community-serving uses (6102.01), have been designated as Opportunity Zones. Census Tract 6106.01 where the lot to be developed under this RFP appears to be physically located is not designated as an Opportunity Zone.



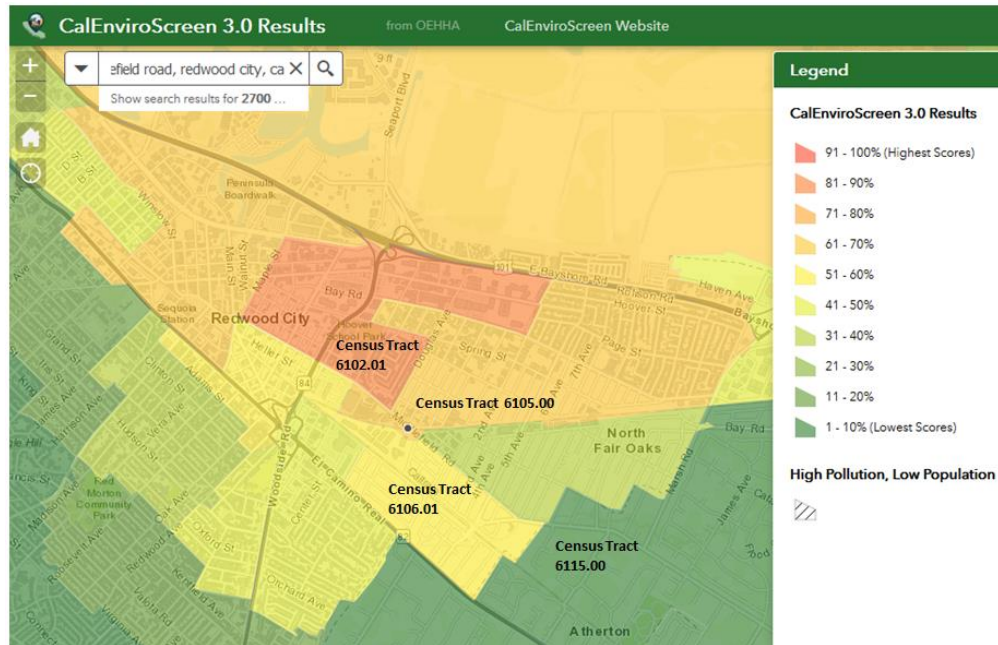
### CalEnviroScreen 3.0

This online tool: <https://oehha.ca.gov/calenviroscreen/maps-data> shows a wide variance in ranking among the Site Census Tracts and nearby tracts.

- The tool ranks Census Tract 6105.00 (the tract with the Shared Driveway) at 66-70% and ranks the immediately contiguous Census Tract 6102.01 (that contains the Community Center, Library and Human Services Agency building) at 81-85%.

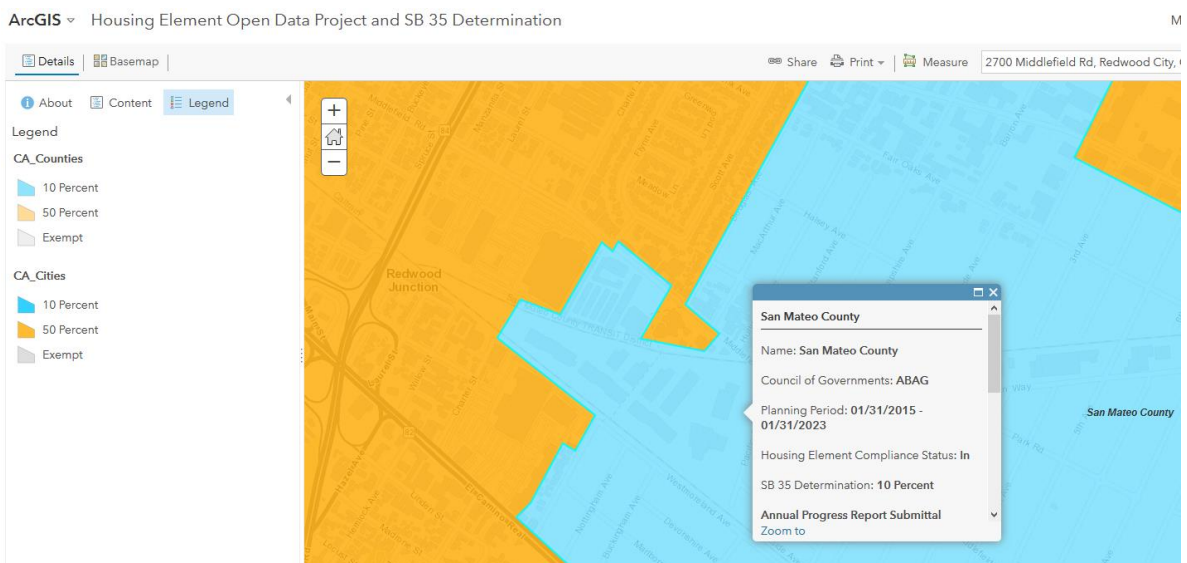


- This tool also ranks Census Tract 6106.01 (the tract that appears to geographically contain the County's vacant lot) at 51-55% and ranks the immediately contiguous tract 6115.00 in Atherton (that is not part of the Site) at 1-5%.



## HCD SB 35 Determination: 10%

As of June 2018 HCD's "Housing Element Open Data Project and SB 35 Determination" map showed the following:



<http://www.arcgis.com/home/webmap/viewer.html?webmap=64a819d37c414e78bd4ca31d762eb88c&extent=-133.6978,31.1397,-106.7153,42.6762>

## TCAC Opportunity Area Map

Both Site Census Tracts, and the adjacent tract containing existing community-serving uses (6102.01), have been designated as “Low Resource” per this 2018 TCAC/HCD Opportunity Area Map:

[http://www.treasurer.ca.gov/ctcac/opportunity/maps/bay\\_area.pdf](http://www.treasurer.ca.gov/ctcac/opportunity/maps/bay_area.pdf).



## H. POTENTIAL COUNTY ASSISTANCE

In addition to the below-market rate provision of land, the project shall be eligible to compete for funding under the County’s annual capital funding NOFAs. DOH typically releases its Affordable Housing Fund (“AHF”) NOFA each summer and a NOFA for federal HOME and CDBG funds in the winter months. Strategic priorities for these NOFAs are set each round. In AHF 6.0, the most recent NOFA round, the County’s priorities are:

- Expand housing opportunities through construction of new affordable multi-family housing developments;
- Target AHF funds to very low- and extremely low-income affordable housing units;
- Maintain existing deed-restricted affordable rental housing in conjunction with re-syndication of Low Income Housing Tax Credits (LIHTC), to support the project, for health and safety reasons and/or to extend the useful life of the improvements when such repairs are beyond the Project’s capital improvement budget;
- Create more extremely low-income and/or supportive housing for homeless households and those at imminent risk of homelessness, including housing opportunities for at-risk former foster youth, persons with serious mental health challenges who are homeless or at-risk of homelessness, and other County clients in need of affordable housing;
- Encourage the creation of affordable multi-family projects containing larger units (2- and 3-bedroom);

- Create more housing within walking distance of services, amenities, and transit – particularly where doing so leverages Affordable Housing & Sustainable Communities (AHSC) funding;
- Build system capacity among affordable housing providers and supportive services providers.

The project shall be eligible to compete for support from the Housing Authority of the County of San Mateo, including Section 8 Housing Choice Vouchers, other rental subsidy programs and provider-based assistance, subject to availability. However, proposals should not assume the availability of project-based rental assistance. Each Proposer's primary proposal shall not include project-based rental assistance. If a Proposer's preferred scenario does involve project-based rental assistance, the proposal may describe how that alternate scenario would differ from the primary proposal.

## **SECTION II: DEVELOPMENT PROGRAM ELEMENTS AND ASSUMPTIONS**

### **A. OBJECTIVES**

The Project has five primary goals:

1. Creating at least 100 below-market rate affordable homes serving households of various sizes, ages, needs, and incomes, some portion of which may be homeownership opportunities;
2. Creating a ground floor childcare center of up to 12,000 sqft with appropriately-sized, dedicated outdoor space up to 8,000 sqft and short-term parking for child drop-off/pick-up;
3. Creating 3,000 to 12,000 sqft of additional community-serving space, if feasible (the use of which shall be determined during community engagement process);
4. Complementing the current public uses on nearby lots (Health Center, Community Center, Childcare Center, Adult Activities Center, Library and Human Services Agency);
5. Engaging the community, potential funders and other stakeholders to assist the County and successful Proposer in scoping and designing a fiscally feasible project that meets the community's needs, including those set forth in the North Fair Oaks Community Plan.

Additional objectives for the process and Project include, but are not limited to:

- Planning and designing an attractive Project that promotes active use, circulation, and resident and user interaction with a focus on health and fitness;
- Creating vibrant spaces that are inviting to all generations and that honor the culture of the community;
- Delivering adequate parking opportunities for residents and users;
- Complementing and leveraging other projects in the area as appropriate including, but not limited to, the Middlefield Road Redesign and Improvements Project, The Caltrain

Modernization Project, High Speed Rail, Dumbarton Rail Corridor improvements, and Regional Measure 3 projects;

- Utilizing green building strategies and planning for sustainable operations;
- Maximizing leverage of the County's below-market rate land contribution to limit the need for additional County funding, and/or strategically return funds to the County over time through lease payments, residual receipts loan repayments, or other creative mechanisms;
- Phasing development if it would allow for greater leverage of County funds or otherwise assist in meeting the goals of the project;
- Communicating regularly with County, the community, potential funders, and other stakeholders;
- Creating affordable housing for clients of County service agencies, including the Human Services Agency ("HSA"), the County Health System and its Behavioral Health and Recovery Services division ("BHRS"), the Health Plan of San Mateo, and the Housing Authority of the County of San Mateo; and
- Offering robust on-site resident services and service coordination reflective of the needs of Project residents.

## ***B. HOUSING PROGRAM***

Through development of the Site, the County seeks to provide at least 100 high-quality affordable homes serving households of various sizes, ages, needs and incomes, some portion of which must be suitable for large households. Proposals may include some below-market rate homeownership opportunities. Proposals must be consistent with the North Fair Oaks Community Plan ("NFOCP") which among other things, prioritizes housing for large households, accessible and affordable senior and other special needs housing, affordable rental and ownership housing, and transit-accessible housing.

(<https://planning.smcgov.org/north-fair-oaks-community-plan>)

The Master Plan intentionally does not detail the specific mix of housing unit sizes, targeted populations or income restrictions. These details are expected to be refined during the community engagement process in close consultation with the County and other potential funders. This is due in part to evolving challenges and opportunities in various existing and new funding sources. It is also reflective of feedback received from affordable housing developers that more impactful projects can be achieved by allowing flexibility in proposals to take maximum advantage of the Proposer's expertise and creativity in accessing a wide range of funding sources. Proposers are encouraged to explore the potential use of the Affordable Housing and Sustainable Communities Program and New Markets Tax Credits.

All of the housing units proposed must be below-market rate with a preference for a mix of incomes that achieves the deepest overall income targeting practicable, subject to the following minimum requirements:

### **Affordability Requirements**

- At least 60% of all units must be rental units for households earning up to 80% AMI Low Income Housing Tax Credit (“LIHTC”) limits.
- At least 10% of all rental units must be rented to “Extremely Low Income” (“ELI”) households earning up to 30% AMI.
- At least 5% of all rental units must be targeted to County Clients as detailed below. These units are in addition to the 10% ELI units.

Households of all income levels present in the Project must be spread proportionally across buildings, floors, and unit sizes to the greatest extent possible.

All units will be restricted as affordable housing for a minimum of 55 years. Please note that the County expects the term of its ground lease to be 99 years and that the ground lease will also restrict the use of the Site to affordable housing and other uses described in this RFP.

### **Housing for Clients of County Services**

A minimum of 5% of the rental units must target individuals or families referred by the County who are currently receiving services from a County agency or a nonprofit service provider contracted by the County. These targeted units shall not also be used to satisfy the ELI household requirement stated above. To the greatest extent possible, these units must be spread proportionally across buildings and unit types/sizes.

All units targeted to clients of County services will be referred to the Project by the County. The County works with its Human Services Agency’s Center on Homelessness (“Center on Homelessness”), the lead agency for San Mateo County’s Continuum of Care, to refer prospective tenants for the required targeted units. These prospective tenants will be referred to the Project with tenant-based rental assistance – typically Section 8 or Permanent Supportive Housing vouchers. However, in the event the County and the Center on Homelessness are ever unable to refer potential tenants who possess, or will soon possess rental subsidies, then the County may refer other income-qualified households in possession of Section 8 vouchers, or will allow the Owner to fill such units with income-qualified households. In such cases, the next available vacant unit of similar size would then be designated as a unit targeted for a household receiving services from the County or one of its contractors, to be referred by the Center on Homelessness.

In addition to rental assistance, County clients will also be connected with and receiving supportive services appropriate for each household’s needs. With the rental assistance, County-provided supportive services, on-site resident services, and service coordination provided by the owner, these households are expected to be able to be successfully housed.



The County expects that prospective tenants referred by the County / Center on Homelessness will be screened by the Owner to determine suitability under the project's tenant selection criteria. However, the County expects the Owner and Property Manager will adopt tenant selection criteria that pose fewer barriers to entry for homeless and ELI households, for instance, adjusting standards for credit scores, eviction histories, and other criteria which will be ameliorated by the rental assistance and services provided by Housing Authority of the County of San Mateo and the County.

Some households referred by the County may have time-limited "Moving to Work" Section 8 vouchers. At the end of their voucher terms, these households must be permitted to remain in their units. However, the Owner is not required to reduce the rent collected for the unit below TCAC requirements, and the residents will be subject to the same rules for payment of rent as any other tenant. For the length of time the household remains a resident of the Project, its unit will continue to count toward the 5% requirement for County referrals.

For any buildings or complexes constructed to house seniors (62+ years in age), in lieu of the process described above, the County, working with the Health Plan of San Mateo, will refer elderly prospective tenants currently residing in health institutions who are capable of living independently with appropriate supportive services. These tenants will be participants in the Health Plan and the County's Duals Demonstration program, described below. In this way, the requirement for clients of County services in senior developments will be met by targeting 5% of units to frail elders with supports provided by the County.

The Duals Demonstration program provides coordinated healthcare delivery to low-income persons who are dually eligible for both MediCal and Medicaid public health insurance programs. The Health Plan of San Mateo coordinates medical benefits, in-home supportive services, and mental health and substance use services, as needed, for program participants. The County and the Health Plan have worked with developer partners to successfully integrate eligible senior Duals Demonstration tenants in four senior developments to-date.

## **Project Size**

The Master Plan assumes development of approximately 130 affordable housing units at the Site. The successful proposal will include at least 100 below-market rate affordable housing units, including some suitable for large households. The Project area will be rezoned in accordance with the NFOCP to allow and encourage residential and commercial mixed-use development at significantly greater densities and intensities than currently allowed, with heights up to roughly 70 feet, and residential densities up to 120 units per acre.

The Master Plan is based on the anticipated community plan zoning, which is up to 80 du./ac., and 50-60' in height, which would allow approximately 253 units, not including state density bonus or concessions. The ability to achieve this density on the site will be a function of the selected developer's program (i.e. unit mix), parking ratio and ability to finance structured and subgrade parking.

Based on fit studies and feedback from focus groups on density, parking costs and limitations of funding, it was determined that a range of 135 to 150 family units could fit appropriately on the site. The alternatives illustrated also considered phased development to allow for two smaller phases in the event this could generate access to certain funding sources, while minimizing the need for extensive structured parking.

The utility studies (Exhibit H) also suggested that the initial phase of approximately 75 apartments may be able to be achieved with limited infrastructure upgrades, while a larger single development, or a second phase development would require larger infrastructure investments up front. See Section I(E) for more detail regarding utilities.

Greater density may be proposed if it is deemed achievable by the selected Proposer. Such an application should present compelling reasoning for the proposed density and strategies for achieving it, including a plan for how it would be considered as part of a robust, multi-lingual community outreach process.

The County will work with the selected proposer to coordinate the re-zoning with the applicant's entitlements. The path for rezoning could be as a single parcel rezone through a PUD or Planned Unit Development particular to this site, or could be a rezoning of this site and multiple sites as part of the Community Plan Rezoning, if it has not yet been completed. It is anticipated that the community-wide rezoning will be completed in late 2019. The County will work with the selected developer to coordinate the best path at the time of entitlements.

### **C. SERVICES COMPONENT**

As discussed above, a minimum of rental 5% of units constructed in the Project must target households referred by the County and HSA's Center on Homelessness. These tenants will be referred to the project with rental assistance and will already be connected to, and receiving services from, a County agency or nonprofit organization contracted by the County.

The County expects that the successful Proposer will provide on-site resident services and service coordination available to all tenants at the Project, rather than just those residents who are clients of County services. At a minimum, these services should be funded at \$500 per unit per year, based upon the number of units rented to households earning up to 80% AMI. Services may be funded through operations, though Proposers are invited to propose another feasible, but more creative manner of paying for them. Proposer teams may pledge a larger amount of operating funds to provide additional services, which may include services for households earning more than 80% AMI, and explain in the proposal what such higher amount will provide. The County also expects that office space sized appropriately for the

planned service staff will be provided within the Project.

For purposes of this RFP, the County defines resident services as those which help to ensure the well-being of residents through activities geared toward social engagement, relationship building, physical activity, financial management, educational support, employment training, and more. The County defines service coordination as ensuring that individuals and families can access the support they need to maintain independence and thrive, including but not limited to case management; health and mental health counseling; health insurance; rental, transportation, food and other subsidies; medical care; and more.

All proposals should discuss how they would complement the nearby existing community-serving uses at the Fair Oaks Health Center, the Fair Oaks Community Center, the Redwood City Child Development Program, the Fair Oaks Adult Activity Center, the Fair Oaks Library and the County's Human Services Agency located near the Site at 2500, 2510, 2600 and 2710 Middlefield Road. The Community Center is one of the County's Core Services Agencies that provide safety net services in coordination with the Human Services Agency.

***Any questions regarding these existing community-serving uses shall be submitted only through either [www.publicpurchase.com](http://www.publicpurchase.com) or the Proposers Information Conference. County will consult with staff of the organizations referenced above, as appropriate, and will post answers to all questions regarding existing community serving uses on [www.publicpurchase.com](http://www.publicpurchase.com).***

#### **D. CHILDCARE**

Recent studies on childcare in both the County and in Redwood City have documented a significant shortfall in current and projected capacity. (Exhibits A and B) By 2025, the shortfall in Redwood City alone is expected to be almost 350 infant spaces, 800 preschool spaces and 600 school age spaces. In addition, this Project is expected to add families with children, some of whom will also need affordable childcare services. Accordingly, both the County and Redwood City have prioritized childcare in this Project and childcare has been included in all three alternatives in the Master Plan.

Proposers are strongly encouraged to review the material available at Build Up SMC, an initiative designed to grow and improve the supply of child care and preschool facilities in San Mateo County. <https://sites.google.com/view/buildupsmc/home>

All proposals shall include a ground floor childcare center of up to 12,000 sqft with appropriately sized dedicated outdoor space up to 8,000 sqft and short-term parking for child drop-off/pick-up. Due to the complexity and highly-regulated nature of the design requirements for childcare space, the County believes it is likely that this work will require the involvement of a professional experienced with industry best practices and childcare design regulations, even for designing the core and shell of the childcare space. All proposals should detail how the Proposer intends to ensure that the childcare center and related outdoor space reflect industry best practices and are in compliance with all applicable regulations. If a professional experienced in industry best practices and childcare regulations ("Childcare Design Professional") is to be part of the Proposer's team, their qualifications should be

included in the proposal. Childcare Design Professionals are in short supply and thus, may work with more than one Proposer in responding to this RFP if agreeable to both the Childcare Design Professional and the Proposer. As a result, the County will not penalize proposals that might present very similar designs for childcare space.

The Redwood City Child Development Program (“RCCDP”) is an existing childcare and child development facility located at the Fair Oaks Community Center near the Site at 2600 Middlefield Road (<http://rccdp.org/>). See also, Existing Conditions Memo (Exhibit G). RCCDP has operated in the same location since 1986 rent-free. They currently have the capacity to serve up to 86 children and almost all of their children are heavily subsidized (approximately 90% of RCCDP’s budget comes from the State). Their toddler classroom is the only subsidized toddler care facility in Redwood City. All of their children attend full days from 7:00 a.m. to 5:30 p.m.

All proposals should reference RCCDP’s existing facility and discuss how the childcare center proposed for the Site would complement RCCDP.

***Any questions regarding RCCDP shall be submitted only through either [www.publicpurchase.com](http://www.publicpurchase.com) or the Proposers Information Conference. County will consult with RCCDP’s staff, as appropriate, and will post answers to all questions regarding RCCDP on [www.publicpurchase.com](http://www.publicpurchase.com).***

#### ***E. POTENTIAL NEW COMMUNITY-SERVING USE(S)***

The County is interested in exploring, with the successful Proposer, the possibility of including additional community-serving uses and expects those to be identified and vetted during the community engagement process. For the purposes of this RFP, Proposers are invited to discuss any proposed uses they wish to investigate for feasibility and explain their expectations for evaluating feasibility and their process for considering one or more possible new community-serving uses.

The Master Plan includes up to 12,000 sqft of ground-floor space for potential new community-serving use(s) in addition to the new childcare center. The feasibility of this space has not been explored and there has not been any market analysis to date. However, the Health Center has noted that access to meeting space for 100 persons would be helpful.

Other preliminary options to consider might be a wellness center and/or community living room with commercial/demonstration kitchen inspected by Environmental Health Services for food safety. The County’s Health System may also be interested in relocating its current Women, Infants & Children (“WIC”) program from 2342 El Camino Real, Redwood City, where they are currently renting 2,489 square feet at \$39 per square foot to Middlefield Junction. There may also be some interest in adding space for behavioral health services.

The County expects that the successful proposer will be flexible and adept at working with diverse stakeholders and government entities in identifying and assessing the feasibility of multiple potential alternatives for community-serving uses. The County acknowledges that proposals of additional community-serving uses can only be broadly conceptual at this stage.

The successful proposal will emphasize the proposer's approach to gather and evaluate input on potential community-serving uses to best inform the ultimate scope of this portion of the project.

#### ***F. SITE PLANNING, MASSING AND DESIGN***

The County seeks a thoughtful, cost-effective conceptual design for the Development Project which strikes an appropriate balance between adding more critically-needed affordable housing and thoughtfully addressing the character of the surrounding neighborhood.

As discussed above, the Site is located in an area that will be rezoned in accordance with the NFOCP to allow and encourage residential and commercial mixed-use development at significantly greater densities and intensities than currently allowed, with heights up to roughly 70 feet, and residential densities up to 120 units per acre. However, as noted, a separate rezoning may be a desirable way to accommodate densities and mixes of uses not entirely consistent with the broader rezoning of the area, as long as the concept for the site's redevelopment is broadly consistent with the intent of the NFOCP. See Section I(D) regarding Zoning and Section II(B) regarding Project Size for more details.

Designs must comply with all County codes and requirements and the latest California Building Codes. As is detailed further in Section IV (D) (9), The County is requesting "conceptual" design proposals which are expected to vary from the final design and unit count ultimately proposed and approved by the County after robust, multi-lingual community engagement and discussions with potential funders. The County will place emphasis on accompanying narrative descriptions of the factors that Proposers intend to consider in formulating full program and design proposals, if selected to develop the Site.

All proposals shall reference the Master Plan, but need not be bound by it. Material differences between the Master Plan and proposals must be explained in the Proposal. While the County is not identifying requirements for any particular design aesthetic or building typology, we expect the outcome will offer thoughtful unit plans and attractive surroundings for the residents and daily users of the Project as well as its neighbors. The County also requires durable, high-quality materials to prevent the need for replacement for many years.

Designs should support opportunities for interaction, indoor and outdoor spaces for group gatherings, as well as opportunities to find solitude. The County also seeks the development of healthy indoor and outdoor environments for residents and users of the Site through integrated design and technology. We also encourage the use of architectural and site design strategies to promote health and physical activity at the redeveloped Project.

Note that the design submission materials described under Section IV (D) (9) of this RFP are intended to limit the need to produce detailed schematic-level drawings. Instead, the County's review of design materials will focus on site planning, design metrics, and the Proposer's strategies, described in the design narrative, for addressing the objectives listed above.



## **G. GREEN BUILDING AND ENERGY EFFICIENCY**

The County intends to select a proposal that will utilize green building strategies and plan for the sustainable operations of the Project from the earliest planning stage. In addition to utilizing healthy building materials and designing the project to limit any pollution that may be caused by Project operations or the development process, the Project should utilize energy-efficient systems and appliances, water- and power-conserving fixtures, durable materials and finishes that eliminate off-gassing or other harmful by-products.

the County expects that the Project will seek to be GreenPoint Rated, and may also consider (but is not required to) obtain ratings or certification through the Leadership in Energy and Environmental Design ("LEED"), Green Communities, Energy Star or other sustainable checklist programs that do not require significant cost to manage the certification process.

## **H. FINANCING PLAN**

### **Cost Considerations**

As part of its review of Proposals submitted under this RFP, the County seeks Project financing plans that are creative and cost-effective, but propose realistic assumptions for both costs and sources. Given the very early pre-planning status of the Project, it should be understood that the proposal with the lowest project cost would not inevitably be the winning proposal, and that any pro forma submitted under this RFP is likely to undergo many changes after community engagement and discussions with potential funders before the start of construction. The County will consider budget cost effectiveness for both development and operations through a variety of lenses including, but not limited to, the number of units proposed, size and type of the proposed units, income targets, quality of the conceptual design and site plan, offerings for on-site amenities, quality of property management and resident services, and more.

### **Leverage**

The County will consider the degree to which Proposers propose to leverage County funds with other viable sources. For purposes of assessing leverage, the County will look at both the County subsidy and any proposed HACSM rental assistance assumed as a funding source in the financing plan.

In addition to limiting the need for up-front County financial assistance, the County will also consider, as leverage, strategies to return funds to the County over time through lease payments, residual receipts loan repayments, or other creative mechanisms. Proposers are encouraged to explore the potential use of the Affordable Housing and Sustainable Communities Program and New Markets Tax Credits.

As described in Section IV (D) (2), Proposers will have the opportunity to describe why they believe their cost profile is reasonable and why it will be feasible to procure their proposed sources.

## **Subsidies & Assistance**

The project shall be eligible to apply for subsidy through regular Notices of Funding Availability (“NOFAs”) published by the Housing Authority of the County of San Mateo or the Department of Housing (“DOH”), including the Affordable Housing Fund “AHF” and federal funding NOFA (HOME, CDBG).

The project shall be eligible to compete for support from the Housing Authority of the County of San Mateo, including Section 8 Housing Choice Vouchers, other rental subsidy programs and provider-based assistance, subject to availability. However, for purposes of this RFP, Proposers should not assume that project-based vouchers will be available. Each Proposer’s primary proposal shall not include project-based rental assistance. If a Proposer’s preferred scenario does involve project-based rental assistance, the proposal may describe how that alternate scenario would differ from the primary proposal.

## **Land: 3.21 Acres**

The County expects to negotiate and sign successive 99-year ground leases with the selected Developer/Owner to transfer control of some or all portions of the Site corresponding to each phase of development, as the Developer/Owner achieves close of construction financing for that particular phase. The County will retain long-term ownership of the land, and, unless specifically excepted, the selected Developer/Owner will own the improvements and manage the property.

The Site was last appraised in May of 2014, prior to demolition of the recycling facility, and prior to the Environmental Site Assessments. At that time, the Site was valued at \$6,720,000. For underwriting purposes, proposers are instructed to assume a current appraised value of \$6,720,000 for the 3.21-acre Site in their pro forma. However, proposers may also, at their option, make different land value assumption(s) and propose additional scenario(s) in narrative form, or in narrative form with supporting pro forma(s). If a proposer chooses to provide alternative land valuation scenario(s) in addition to the primary pro forma, then the narrative shall explain why the proposer believes that the alternative land value is more appropriate than \$6,720,000.

## **Summary of Financial Assumptions**

In addition to the financial assumptions discussed above, Proposers are directed to make several other assumptions in creating their budget submissions. Please refer to Section IV (D) (3) below for a list of all assumptions Proposers should use in their financial pro formas and analysis.

## **Additional Directions**

- Given the possibility of multi-phased development, Proposers may submit separate budgets for each development phase if the Proposer expects to finance the Project through multiple financial structures.

- Proposers must include the expected cost and proposed financing plan for resident services and service coordination in their pro forma.

### SECTION III: RFP PROCEDURE

This section describes the general RFP procedure used by DOH on behalf of the County, and the remaining sections of this RFP list detailed requirements for Proposals.

#### **A. MANDATORY USE OF PUBLIC PURCHASE & DELIVERY OF HARD COPIES & USB DRIVE**

##### **1. Mandatory use of Public Purchase:**

Proposers interested in responding to this RFP must register online with the County at [www.publicpurchase.com](http://www.publicpurchase.com). DOH will also post this RFP on its website and may otherwise publish and promote it, however, all proposals must be submitted through [www.publicpurchase.com](http://www.publicpurchase.com) in addition to submission by delivering hard copies and USB Drive as instructed below to be considered for an award. The County and DOH will not be held responsible for, or held liable for registration errors on [www.publicpurchase.com](http://www.publicpurchase.com).

As discussed in more detail below, all questions and requests for clarification, except those raised at the Proposers Information Conference, shall be asked and answered through [www.publicpurchase.com](http://www.publicpurchase.com).

If changes to the RFP are warranted, they will be made in writing, clearly marked as addenda to the RFP, and posted to the RFP at [www.publicpurchase.com](http://www.publicpurchase.com). It is the responsibility of each Proposer to check [www.publicpurchase.com](http://www.publicpurchase.com) for changes and/or clarifications to the RFP prior to submitting a response, and a Proposer's failure to do so will not provide a ground for protest.

All proposals in response to this RFP shall be submitted electronically through [www.publicpurchase.com](http://www.publicpurchase.com) in addition to submission by delivering hard copies and USB Drive as instructed below before 4:00 p.m. PST on the closing date listed on the cover page of this RFP. The County/DOH will not be responsible for and may not accept late bids due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures) of the [www.publicpurchase.com](http://www.publicpurchase.com) system.

Upon receipt by County/DOH via [www.publicpurchase.com](http://www.publicpurchase.com), all proposals are electronically date/time stamped.

##### **2. Mandatory Delivery of Hard Copies & USB Drive:**

In addition to submitting Proposals through [www.publicpurchase.com](http://www.publicpurchase.com) as described above, **Proposers must also deliver** one **original** of their Proposal with wet signatures plus **five (5) hard color copies** and one digital version submitted on a



**USB (thumb) drive** before 4:00 p.m. PST on the closing date listed on the cover page of this RFP to:

San Mateo County Department of Housing  
264 Harbor Blvd., Building A  
Belmont, CA 94002  
Attn: Heather Peters

**Hand delivery is advised** so that the Applicant can obtain a date/stamp receipt from the Department receptionist.

It is requested that attached Narratives be submitted in an 8-1/2" by 11" format using 11-point font at 1.07 line spacing.

All attachments to Proposals are to be submitted digitally (via [www.publicpurchase.com](http://www.publicpurchase.com) and USB Drive) in portable document format ("PDF"). However, **Proposers are also required to submit unlocked Excel versions of the financial pro forma(s), in addition to the PDF format.**

All Proposals must be received in all formats discussed above by the stated date and time in order to be considered for award. Proposals, or portions of Proposals, received late, or received in any manner that is inconsistent with the instructions contained in this RFP (including via fax or e-mail), will not be opened or given any consideration for the proposed services unless doing so is deemed to be in the best interests of the County/DOH, as determined in the sole discretion of County/DOH.

#### **B. TENTATIVE SCHEDULE OF RFP EVENTS**

EVENT	TARGET DATE
1. RFP Release Date	<b>July 10, 2018</b>
2. Optional Site visit and Proposers Information Conference at Fair Oaks Health Center, 2710 Middlefield Road, Redwood City, CA 94063	<b>July 30, 2018 at 10:00 a.m.</b>
3. Deadline to Submit Written Questions through <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>	<b>September 10, 2018</b>
4. Release of Responses to Written Questions through <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>	<b>By September 17, 2018</b>
5. Proposal Deadline – Proposals Must be RECEIVED by 4:00 p.m. on This Date	<b>October 15, 2018</b>
6. Development Team Interviews*	<b>Week of December 3, 2018</b>
7. Director of Department of Housing review/approval of recommended proposal*	<b>December 17, 2018</b>

8. Protest Deadline	<b>5 business days after award(s)</b>
9. Deadline to respond to protests	<b>5 business days after receipt</b>
10. Board of Supervisors approval of selected proposal and direction to sign an Exclusive Negotiating Agreement (“ENA”)*	<b>January 2019</b>

*\*These dates/times are subject to change*

### **Optional Site visit and Proposers Information Conference**

An optional Site visit and Proposers Information Conference will be held at the Fair Oaks Health Center, 2710 Middlefield Road, Redwood City, CA 94063 on Monday, July 30, 2018 at 10:00 a.m. As part of the Proposers Information Conference, Proposers will be invited to walk the Site with County staff. We expect the Site visit and Proposers Information Conference will run approximately 1-2 hours. The purpose of the meeting is to ensure that all prospective Proposers understand the program elements, submittal requirements, and scoring system. Although attendance is not mandatory, it is highly recommended.

Representatives from the following organizations are expected to be available to answer questions at the Conference:

- Van Meter Williams Pollack
- Economic Planning Systems
- The County’s
  - Housing Department
  - Planning & Building Department
  - Department of Public Works
  - Health System
- Health Center
- Redwood City Child Development Center (“RCCDP”)
- Redwood City’s Child Care Coordinator

### **Questions and Requests for Information**

With the exception of questions raised at the Proposers Information Conference, all questions or requests for clarification “Questions” relating to this RFP must be submitted through [www.publicpurchase.com](http://www.publicpurchase.com). All Questions must be received no later than 4:00 p.m. PST on the date specified in this RFP.

***Any questions regarding existing community-serving uses at the Fair Oaks Health Center, the Fair Oaks Community Center, the Redwood City Child Development Program, the Fair Oaks Adult Activity Center, the Fair Oaks Library and the County’s Human Services Agency shall be submitted only through either [www.publicpurchase.com](http://www.publicpurchase.com) or the Proposers Information Conference. County will consult with staff of the organizations referenced above, as appropriate, and will***

***post answers to all questions regarding existing community serving uses on [www.publicpurchase.com](http://www.publicpurchase.com).***

The County will seek to respond to all Questions through [www.publicpurchase.com](http://www.publicpurchase.com) in a timely fashion. All Questions and answers will be posted electronically for all prospective Proposers to review on [www.publicpurchase.com](http://www.publicpurchase.com) by the date specified in this RFP.

Questions raised at the Proposers Information Conference will be answered orally. If any substantive new information is provided in response to Questions raised at the Conference, it will also be posted on [www.publicpurchase.com](http://www.publicpurchase.com). No Questions will be accepted after 4:00 pm, Monday, September 10, 2018.

If changes to the RFP are warranted, they will be made in writing, clearly marked as addenda to the RFP, and posted to [www.publicpurchase.com](http://www.publicpurchase.com). It is the responsibility of each Proposer to check [www.publicpurchase.com](http://www.publicpurchase.com) for changes and/or clarifications to the RFP prior to submitting a response, and a Proposer's failure to do so will not provide a ground for protest.

### **C. CONFIDENTIALITY OF PROPOSALS**

California Government Code Sections 6250 *et seq.* the California Public Records Act (PRA) defines a public record as any writing containing information relating to the conduct of the public business. The PRA provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure. The County and DOH are subject to the California Public Records Act.

Be advised that any contract that eventually arises from this RFP is a public record in its entirety. Also, all information submitted in response to this RFP is itself a public record **without exception**. Submission of any materials in response to this RFP constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County or DOH if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County and DOH for release of such information.

If the County or DOH receive a request for any portion of a document submitted in response to this RFP, the County and DOH will not assert any privileges that may exist on behalf of the person or entity submitting the proposal and the County and DOH reserve the right to disclose the requested materials without notice to the party who originally submitted the requested material. To the extent consistent with the PRA and applicable case law interpreting those provisions, the County and DOH, and/or their officers, agents, and employees retain discretion to release or withhold any information submitted in response to this RFP.

Submission of a proposal constitutes a complete waiver of any claims whatsoever against the County and DOH, and/or their officers, agents, or employees that the County or DOH have violated a Proposer's right to privacy, disclosed trade secrets, or caused any damage

by allowing the proposal to be inspected, or any other claim associated with the Proposer's submittal.

#### ***D. NOTICE TO PROPOSERS***

The County and DOH are not required to give notice to Proposers in any specific format or on any particular timeline. At some point prior to execution of a final agreement for the requested services, County/DOH will notify those who submitted proposals of their non-selection. Proposers may be notified at different times depending on the needs of the County and DOH.

#### ***E. PROTEST PROCESS***

If a Proposer desires to protest the selection decision, the Proposer must submit by facsimile or email a written protest within five (5) business days after the delivery of the notice about the decision. The written protest should be submitted to the Director of DOH as outlined below. Protests received after the deadline will not be accepted. Protests must be in writing, must include the name and address of the Proposer, must reference the Request for Proposal's title – "REQUEST FOR PROPOSALS FOR DEVELOPMENT OF MIDDLEFIELD JUNCTION - PARCEL A", and must state all the specific ground(s) for the protest. A protest that merely addresses a single aspect of the selected proposal (for example, comparing the cost of the selected proposal in relation to the non-selected proposal) is not sufficient to support a protest. A successful protest will include sufficient evidence and analysis to support a conclusion that the selected proposal(s), taken as a whole, is/are inferior.

The Director of DOH, or the Director's designee, will respond to a protest within ten (10) business days of receiving it, and DOH may, at its election, set up a meeting with the Proposer to discuss the concerns raised by the protest. The decision of the Director of DOH, or the Director's designee, will be final. The protest letter must be sent by facsimile and email to:

San Mateo County Department of Housing  
Attn: Kenneth Cole, Director  
kcole@smchousing.org  
Facsimile: 650-802-3373

### **SECTION IV: PROPOSAL SUBMISSION REQUIREMENTS**

This RFP seeks the submission of proposals from any and all interested and qualified Proposers. The County/DOH seeks by way of this RFP to obtain the listed development in a manner that maximizes the quality of development while also maximizing value to the County/DOH, and, by extension, the citizens of the County. Proposers must be able to show that they and any proposed subcontractors are capable of performing in a highly professional and effective manner. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering development projects of a similar scope and type and local availability of the Proposer's personnel and equipment resources.

There will be no public opening of proposals. All proposals shall be firm offers, and will so be considered by the County/DOH, although the County/DOH reserves the right to negotiate terms upon evaluation of the proposals. Proposals will be considered valid offers for a period of ninety (90) days following the close of the RFP.

By submitting a proposal, each Proposer certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the Proposer's capability of rendering the services to be provided. The failure of a Proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of County/DOH. The County/DOH reserves the right to evaluate the contents of proposals submitted in response to this RFP and to select a contractor, if any.

Proposals should be in the format and sequence required below. It is requested that attached Narratives be submitted in an 8-1/2" by 11" format using 11-point font at 1.07 line spacing.

All Proposers must use [www.publicpurchase.com](http://www.publicpurchase.com) to submit Proposals, questions and requests for clarification. See Section III(A) above for details regarding [www.publicpurchase.com](http://www.publicpurchase.com).

### ***PROPOSER DESCRIPTION AND DEFINITIONS***

A Proposer or respondent ("Proposer"), is a qualified housing developer as defined below. The Proposer must submit their response to this RFP on behalf of a "Developer Team", which is defined as a team comprised of only the following: a qualified housing developer ("Developer"), qualified architect ("Architect"), Childcare Design Professional (if any), qualified property management entity ("Property Manager"), and a qualified resident services provider entity ("Resident Services Provider"). See below for minimum experience and capacity requirements for each member of the Developer team.

1. *Developer*: A qualified Developer is defined as: a nonprofit or for-profit organization, a joint venture, or a partnership of more than one entity, where the Developer or identified lead Developer (in the case of more than one developer entity) has a demonstrated track record of: (i) securing low-income housing tax credits and other sources of affordable housing financing; (ii) successfully developing and owning deed-restricted affordable multifamily rental mixed-use complexes; and (iii) successfully developing and maintaining high quality affordable housing developments in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, and Santa Clara).
2. *Architect*: A qualified Architect is defined as a lead architectural firm other than Van Meter Williams Pollack with experience in performing key roles including site and improvements design, obtaining entitlements, community outreach and engagement, and construction oversight for deed-restricted affordable multifamily rental housing and mixed-use developments, preferably in the nine-county Bay Area as defined above. Experience in mixed-use developments that include childcare is preferred. If the



qualified Architect does not have experience in projects with childcare the Proposal must detail how the Proposer intends to ensure that the childcare center and related outdoor space are in compliance with industry best practices and all applicable regulations. If a Childcare Design Professional experienced in industry best practices and childcare regulations is to be part of the Proposer's team, their qualifications should be included in the proposal. Childcare Design Professionals are in short supply and thus, may work with more than one Proposer in responding to this RFP if agreeable to both the Childcare Design Professional and the Proposer.

3. Property Manager: A qualified Property Manager is defined as a nonprofit or for-profit organization or entity with expertise in contracting with owners of income-restricted affordable housing developments to provide ongoing property management services.
4. Resident Services Provider: A qualified Resident Services Provider is defined as a nonprofit or for-profit organization with expertise in contracting with owners of income-restricted affordable housing developments to provide resident-focused social and other services as well as coordination of services for the residents.

While it is not necessary for the Proposer to have already identified and selected a Supportive Services Provider for any proposed supportive housing units, the Proposer must be able to describe in their proposal the types of supportive housing services that would be offered for any proposed supportive housing units.

## **PROPOSER MINIMUM EXPERIENCE AND CAPACITY REQUIREMENTS**

### **1. Minimum Experience Requirements**

- a. Developer: A qualified Developer must have the following minimum experience:
  - (i) a successful track record of development, including at least two (2) years of ownership\*, of at least **two** (2) new-construction affordable housing projects within the nine-county Bay Area as defined in V (E) (1) in which at least 50% of the units are LIHTC-financed, income-restricted units and which serve populations similar to the Proposer's proposed development; **AND**
  - (ii) a successful track record of development, including at least two (2) years of ownership\*, of at least **one** new-construction, mixed-use affordable rental housing project containing at least sixty (60) residential units restricted to those at or below 60% AMI (additional units in the project may target higher income levels) and at least one community-serving use such as a childcare center, health clinic, senior center, retail food store, or other type of non-residential community-serving use (*as described by Proposer in Attachment #3*). A mixed-use project meeting these requirements may also be counted toward meeting the minimum experience requirements in above if it is located in the nine-county Bay Area and meets all of the other requirements in that section.

(\*NOTE: Ownership by an affiliated limited partnership or LLC for tax credit purposes will qualify as ownership of the project).

- b. Architect: A qualified Architect must have the following minimum experience: successful service as the lead architect during the entire predevelopment and construction phases for a minimum of three (3) completed tax credit-financed, new-construction multifamily rental developments, at least one of which is within the nine-county Bay Area as defined above. Experience in mixed-use developments that include childcare or commercial space is preferred. If the qualified Architect does not have experience in projects with childcare the Proposal must detail how the Proposer intends to ensure that the childcare center and related outdoor space incorporates industry best practices and are in compliance with all applicable regulations. If a Childcare Design Professional is to be part of the Proposer's team, their qualifications should be included in the proposal. Childcare Design Professionals are in short supply and thus, may work with more than one Proposer in responding to this RFP if agreeable to both the Childcare Design Professional and the Proposer. As a result, the County will not penalize proposals that might present very similar designs for childcare space.
- c. Property Manager: A qualified Property Manager must have the following minimum experience: successful management, for a period of at least 24 months within the last five years, of at least one hundred (100) tax-credit-financed multifamily rental units serving similar populations to those proposed by the Proposer for the Project. Such income-restricted rental units must be within developments containing at least 15 income-restricted rental units. At least 50 of these 100 managed units must be located within the nine-county Bay Area as defined above.
- d. Resident Services Provider: A qualified Resident Services Provider must have the following minimum experience: successful provision of resident services/service coordination for at least three (3) income-restricted multifamily rental developments for a period of at least 24 months within the last five years serving similar populations to those proposed by the Proposer. Such income-restricted affordable multifamily rental developments must consist of properties containing at least 15 income-restricted rental units. At least two (2) of these three (3) rental developments must be located within the nine-county Bay Area as defined above.

## 2. Capacity Requirements

The Developer(s) and Architect must indicate in Attachment #5 (Developer Staffing Workload Form) and Attachment #6 (Architect Staffing Workload Form) the percent of time that key personnel will devote to the Project. While there is no required minimum for such capacity commitment, the Proposer will be evaluated about their capacity to undertake the Project based on an indication of staffing sufficient to carry out necessary tasks.

## **PROPOSAL CONTENT AND FORMATTING REQUIREMENTS**

Proposers are to provide the requested information in the order indicated below, including a table of contents, with sections separated by labeled tabs corresponding to sections V (A.) – V (I.) below and their sub-sections. Please use an 11-point font with 1.07 line spacing for all narratives:

### **A. Submittal Checklist**

The Proposer must complete and submit **Attachment #1**, Submission Checklist, certifying that all of the items on the Checklist are contained in the Proposer's response.

### **B. Proposal Table of Contents**

### **C. Proposer Information**

1. **Proposer & Team Description Form**: Complete **Attachment #2**, the Proposer & Team Description Form.
2. **Resumes**: Submit resumes for all persons identified on the Proposer & Team Description Form.

### **D. Proposed Project Information**

Present a development concept, financing proposal, and other proposed project information, clearly describing all important assumptions, by providing the following documents:

1. **Project Narrative**: Submit a narrative of no more than five (5) pages describing:
  - the proposed development program, including the proposed populations and AMI range to be served; types and approximate square footages of uses; housing types, unit counts and sizes; residential amenities; childcare; any community-serving uses; open space areas; parking ratios and numbers of parking spaces; and other important elements (quantities may be expressed as ranges, so long as a specific program is identified for purposes of the financing proforma);
  - the phasing of Project build-out, if any;
  - the overall financing strategy (a more detailed narrative to be provided separately) and any other important Project or program elements;
  - how the proposed populations were identified, how they will fit together compatibly within the Project, and approach for providing services (a more detailed narrative regarding services to be provided separately). Describe how any community-serving uses serve the proposed population(s) and the surrounding community;
  - your expectations for stakeholder acceptance of the proposal and any plans for supporting that process, including details regarding planned outreach to the community with emphasis on addressing residents' concerns that any changes in the neighborhood could increase risks of displacement and gentrification.

## 2. **Financing Narrative:**

Submit a narrative of no more than three (3) pages describing the proposed financing structure. Given the early stage of this process, multiple options and strategies may be discussed, but the narrative should explain your expectations for feasibility and reasoning for using various structures, preferences among scenarios and decision points that will lead to a final financing plan consistent with the Development Program Elements and Financing Assumptions as described in Section II above.

The narrative should discuss the Proposer's plans for financing the development of the core and shell portion of the new childcare center, and expectations for calculating rent to be charged to the childcare operator.

The Proposer's considerations, process for evaluating and expectations for the feasibility of any new community facility uses to be investigated should also be described in this narrative.

While not a requirement of the RFP, and depending on the amount of DOH subsidy assumed, the County believes that the resulting Project may be able to make regular lease, residual receipt, or other payments to the County. We are open to various strategies for considering and addressing this issue and expect each Proposer to clearly explain its proposal and reasoning in its application. Proposers should also discuss their confidence in being able to make any such payments to the County.

## 3. **Financial Proforma:**

Submit a project proforma in both PDF and unlocked Microsoft Excel formats. At a minimum, the Financial Proforma should include the following information/tabs:

- Construction and permanent sources and uses
- Development budget
- Income and expense projections
- Loan sizing worksheet (including debt coverage ratio, interest rate, etc.)
- 30-year cash flow projections
- Tax credit worksheet with basis projections and credit pricing

If multiple scenarios are discussed in the Financing Narrative due to projected project-based rental assistance or other variables, Proposers may describe resulting variations in the narrative, or may (but are not required to) submit additional proformas or alternate tabs within one workbook.

Proposers may also submit multiple separate budgets corresponding to multiple development phases, if the phases are expected to be financed separately.

***IMPORTANT NOTE:*** Please note that the County is not seeking to make its selection of a Proposer based on the "lowest cost" submission. We are seeking

*efficient, cost-effective design, with realistic cost assumptions to achieve that design. To facilitate across-the-board comparisons between Proposer proposals, please use the following assumptions when developing your Financial Proforma, although such assumptions are only for comparative purposes and may not represent the terms in a final development scenario:*

### Summary of Financial Assumptions

Prevailing Wage	Use California prevailing wage rates
Costs Level	Assume all costs based upon current standards as of the date of the RFP submission deadline
Appraised Property Value	Assume an appraised value of \$6,720,000 for the 3.21-acre Site to be developed with housing and associated community-serving uses and controlled by Developer. However, proposers may also, at their option, make different land value assumption(s) and propose additional scenario(s) in narrative form, or in narrative form with supporting pro forma(s). If a proposer chooses to provide alternative land valuation scenario(s) in addition to the primary pro forma, then the narrative shall explain why the proposer believes that the alternative land value is more appropriate than \$6,720,000.
DCR	Use a 1.15 debt coverage ratio across all hard debt
County Fees	For purposes of this RFP, assume a total of \$1,000,000 in County fees. (the selected Developer will work with the County to determine applicable County fees).
Project-Based Vouchers	Proposals should not assume the availability of project-based rental assistance. Each Proposer's primary proposal shall not include project-based rental assistance. If a Proposer's preferred scenario does involve project-based rental assistance, the proposal may describe how that alternate scenario would differ from the primary proposal and may, but is not required to, submit an additional proforma showing the project-based scenario.
FMRs	If an alternative scenario involves project-based rental assistance, assume the following DOH-calculated Fair Market Rents (FMRs) for the project-based Section 8 units: Studio (\$2,014); 1-BR (\$2,499); 2-BR (\$3,121); 3-BR (\$4,070); 4-BR (\$4,346)
Childcare Center Lease	Assume a far below-market rent of no more than \$3 psf. If Proposer believes this is not feasible, then the proposal shall detail why a higher rent must be assumed for the project to be feasible. If Proposers



	provide multiple scenarios for childcare rent, then the variations must be described in the narrative, or may (but are not required to) submit additional proformas, or alternate tabs within one workbook.
Resident Services	Assume \$500 per rental unit per year at a minimum for the resident services budget based on the number of rental units.

#### 4. **Childcare Plan:**

Submit a childcare plan *of no more than three (3) pages* that is consistent with the requirements of the childcare component described above and that includes the following information:

- Proposed square footage of facility;
- Proposed square footage of dedicated outdoor space;
- Proposed short-term parking for child drop-off/pick-up;
- Detailed description of how Proposer intends to ensure that designs incorporate industry best practices and comply with industry best practices and all applicable regulations for childcare center and dedicated open space;
- Details of how Proposer intends to identify an operator for the facility;
- Estimates of costs to be borne by Developer to provide warm shell, dedicated outdoor space and parking for childcare center;
- Estimates of costs expected to be borne by childcare operator, including but not limited to, tenant improvements and rent, if any;
- Strategies for assisting childcare operator in raising needed capital funds, if any;
- If known, details of Proposer's strategy for assisting operator in identifying scholarships and subsidies for care;
- If known, identify approximately how many infants, preschoolers and school-aged children would be served, and specify the income levels to be served in each age group.
- If known, provide details of how the facility would be marketed and how waitlists would be managed.
- If known, provide any details regarding services to be offered at the facility. Proposals with a variety or array of services, including a mix of learning or

tutoring, arts and crafts, traditional childcare activities, playtime activities and mental health services are preferred.

**5. Services Plan:**

Submit a services plan *of no more than three (3) pages* that is consistent with the requirements of the Services Component described above and that includes the following information:

- Services Provider's overall philosophy and plan for providing services at a mixed-population, mixed-income, and mixed-age development, with a minimum of 8% of units set aside for households who are clients of County services to be referred by HACSM and the Center on Homelessness. If the Services Provider has adopted an innovative approach to support service provision for any of the proposed resident population(s), please describe that approach. Discuss the services to be provided on-site and what referrals are typically made to other off-site resources, as well as your expectations for accessing such off-site resources from the Project site.
- Methods which have been most useful in engaging residents. Please also describe ways to tailor those methods, or develop new approaches, to best serve the proposed resident population(s).
- Describe your proposed staffing model (i.e., note staff titles, position descriptions, salaries, and percentage of full-time equivalents, or FTEs) and explain how FTE time will be allocated.
- Describe what sources of funding will be used to pay for the services.

**6. Services Budget:**

Submit a services budget that is consistent with the Service Provider's proposed Services Plan in Section IV (D) (5), above. Include, at a minimum, sources as well as uses.

**7. Community Outreach Plan:**

Submit a community outreach plan *of no more than three (3) pages* that describes the Proposer's overall philosophy and strategy for informing and engaging the community during the development process in both English and Spanish. Explain why this strategy is likely to be successful, and in particular, why it is likely to be successful for gaining community acceptance of the proposed massing, height, and unit counts. Particular emphasis should be paid to how the Proposer will be addressing residents' concerns that any changes in the neighborhood could increase risks of displacement and gentrification.

**8. Marketing Plan:**

Submit a marketing plan *of no more than two (2) pages* that includes the following information:

- a. Proposer's overall strategy for marketing the non-targeted affordable units proposed in the Project Narrative (those NOT set-aside for clients of County service agencies or other special needs populations). Describe outreach elements (advertising, community meetings, etc.), including affirmative fair housing marketing approach as well as the proposed staffing model to support potential tenants through the application and leasing process (i.e. through internal staffing or through the use of a dedicated consultant).
- b. Specific outreach methods which have been most useful in engaging a diverse pool of potential Proposers.
- c. Specific methods for marketing any set-aside units targeted to supportive or special needs populations proposed in the Project Narrative.
- d. A marketing budget line item cost, appropriate for the work involved and consistent with the Financial Proforma and the Proposer's marketing plan.

**9. Site Plan and Massing Concept:**

a. Narrative:

Provide a narrative *of no more than three (3) pages* describing the conceptual Site Plan, building massing, and form, as shown in the drawings described below. The narrative should explain the Proposer team's primary goals and strategies for site planning; how the proposal fits into the surrounding neighborhood; reasoning for the proposed density, unit count, building height and building typology; and the factors to be considered in formulating the final design proposal for County review which may change the ultimate proposal from the conceptual proposal submitted herein. It should also include green building/sustainability goals and proposed methods of achieving them. Describe how the conceptual Site Plan supports any plans for development phasing described in the Proposal. Use of either prose or bullet-points for the narrative is acceptable. *Up to three (3) additional pages* of example images may be attached to aid in communicating these guidelines, but are not required.

b. Conceptual Site Plan and Massing Drawings:

Provide pre-schematic level drawings, as follows. Any printed pages larger than standard letter size must be folded to fit within the 8.5 x 11-inch submittal format. Drawings should be in black and white (color may be used only to differentiate program areas from one another but shall NOT be used to depict material finishes):

- Site Plan:

At a scale of 1" = 80' indicate the locations and footprints of buildings, open space, streets, walkways, parking, and other major physical features and amenities. Indicate building heights and unit counts or ranges, as well as locations of community-serving use(s).

- Building Massing and Form:

Provide at least two aerial or axonometric views illustrating building massing and form, and the relationships of the proposed urban form to the surrounding neighborhood buildings. Supplement with massing diagrams to the extent needed to fully depict proposed building massing.

**NOTE:** The intent of the drawings is not to develop schematic-level design for the project, but to illustrate the development team's intentions for a mix of uses; communicate proposed building typology and building layouts, parking, circulation, and open space; indicate expected unit mix, count and locations; and illustrate the massing implications of the proposed development program according to the criteria for drawings listed above.

**No other drawings, renderings, elevations, or models of any kind are required, nor will such materials be accepted as part of an Application. Furthermore, unless otherwise requested by the County, Proposers are prohibited from presenting any additional drawings, renderings, elevations or models in excess of the accepted submission at Proposer interviews or any other County presentations.**

**E. Developer Experience & Capacity**

**1. Developer's Experience in Comparable Projects:**

a. Project Details:

Complete **Attachment #3**, the Comparable Projects Experience Form. Developers should use this form to convey their experience in up to a maximum of three (3) projects completed within the past ten (10) years by the Developer(s) that are comparable to the proposed project. At least one of these projects must be located within the nine-county Bay Area. For purposes of this RFP, a comparable project would be new construction mixed-use affordable rental housing project containing at least sixty (60) residential units restricted to households at or below 60% AMI (additional units may target households with incomes above 60% AMI) and at least one community-serving use such as a childcare center, health clinic, senior center, retail food store, or similar community-serving use. *Using the form provided, please limit your response to no more than three (3) pages per project, including the narrative section. Up to*

*three pages of project photos may be included, but are not required, and are not counted toward the length of the response.*

b. Community Outreach Narrative:

Provide a narrative of *no more than three (3) pages* describing how the Developer successfully conducted community outreach for the projects listed on Attachment #3 (Comparable Projects Experience Form). Include any outreach conducted in Spanish.

c. Summary Statement of Experience and Strategy for Comparable Projects:

Provide a narrative statement of *no more than three (3) pages* describing the Developer's overall experience in developing and managing larger, comparable mixed-use and/or mixed-income projects, including the amount of experience of each member of the Developer team. Include a summary of challenges faced in these types of projects and the strategies used for addressing such challenges.

2. **Developer's Experience in Other Projects in the Nine-County Bay Area:**

Complete **Attachment #4**, the Bay Area Projects Experience Form to describe *up to three (3) additional projects*, as needed, so that the sum of the comparable projects described under IV (E) (1) (a) (Comparable Project Experience, above) plus the projects described in this section equals no more than four (4) projects. For example, a Proposer that describes two comparable projects may describe up to two additional projects in this section, and so forth. Developers should use this section to convey their experience developing new construction affordable housing projects completed within the past ten (10) years and located within the nine-county Bay Area. These additional projects may, but are not required to be, comparable to the proposed project, but should represent projects that have relevant qualities to the proposed project. *Using the form provided, please limit your response to no more than two (2) pages per project, including the narrative section. Photos of projects may be included, but are not required, and are not counted toward the length of the response.*

3. **Developer's Experience with Childcare and Other Community-Serving Facilities:**

Provide a brief narrative describing the Developer's experience, if any, with incorporating a childcare center into an affordable housing development including:

- The total number and type(s) of childcare facilities developed and contact information for up to three (3) current childcare provider(s).
- If Developer has worked with a Childcare Design Professional(s), describe their role(s) in the project(s) and provide contact information for up to three (3) of these Childcare Design Professional(s).



- Information on how up to three childcare facilities were financed, whether ongoing rent is charged to these childcare operator(s) and if so, state the amount of the rent and any other relevant financial terms of these childcare lease(s).
- Descriptions of any important lessons learned from developing prior childcare facilities that have enhanced the Proposer's qualifications to develop Middlefield Junction.

Provide a brief narrative describing the Developer's experience, if any, with incorporating community-serving uses other than childcare facilities (community center, senior center, etc.) into an affordable housing development including:

- The total number and type(s) of community-serving facilities developed and contact information for up to three (3) current tenants of these facilities.
- Information on how up to three (3) non-childcare community-serving facilities were financed, whether ongoing rent is charged to the tenant(s) and if so, state the amount of the rent and any other relevant financial terms of these tenants' lease(s).
- Descriptions of any important lessons learned from developing prior non-childcare community-serving facilities that have enhanced the Proposer's qualifications to develop Middlefield Junction.

4. **Developer's Overall Experience:**

Provide a brief narrative, up to one (1) page in length, describing the Developer's overall development experience and portfolio. If a Developer already has a short handout describing its development experience, that document may be submitted in lieu of this narrative, if desired.

5. **Developer's Workload Capacity:**

Complete **Attachment #5**, the Developer Staffing Workload Form. All "Key Personnel" of the Developer who will be working on this Project must be included in this form.

**F. Architect Experience & Capacity**

1. **Architect's Experience in Comparable Projects:**

- a. **Comparable Projects Descriptions:** In a narrative of no more than one page per project, describe at least one, but not more than three (3), comparable developments completed within the last ten years, including dates completed and client contact information for each. (If the Architect was not the sole architect, please describe the Architect's role in the project). The term "comparable"

means that the development is similar in building type and density to the proposed project. At least one of these comparable developments must be in the nine-county Bay Area, and it is preferable, but not required, that the other developments are also located in the nine-county Bay Area. If Architect was assisted in any of these projects by a Childcare Design Professional, describe their involvement.

- b. Photos: Submit up to six (6) photos of the interiors and exteriors for each of the comparable projects listed above, to display architectural design features, relationships of buildings and relationships with adjacent uses (other developments, streets, etc.)

2. **Architect's "Sustainable Building" Experience:**

In a narrative *of no more than one page*, describe experience with sustainable building design and evidence of current Green Point Rated, LEED accredited, or other comparable certification-holding professionals, if any.

3. **Architect's Workload Capacity:**

Complete **Attachment #6**, the Staffing Workload Form, for the Architect's team. All "Key Personnel" of the Architect who will be working on this Project must be included in this form.

**G. Property Management Experience**

1. **Property Management Approach Narrative:**

Provide a written narrative of no more than two (2) pages describing the Property Manager's philosophy for managing affordable housing projects and any challenges posed by the listed projects that the Property Manager successfully addressed, and which the Proposer would like to share.

2. Complete **Attachment #7**, the Property Management Experience Form.

**H. Resident Services Provider Experience**

1. **Services Approach Narrative:**

Provide a written narrative *of no more than three (3) pages* describing the Resident Services Provider's approach to providing general services to residents of the affordable housing. Proposer may use this opportunity to describe how Resident Services coordination with any Supportive Housing service providers would be carried out.

2. Complete **Attachment #8**, the Resident Services Provider Experience Form.

**I. Other Required Information**

**1. Disclosure Questions:**

Proposer (including each Developer Entity if more than one, as defined in Section (A) of Attachment #2 (Proposer & Team Description Form) shall complete and submit **Attachment #9**, Disclosure Questions. These questions are designed to identify any potential conflicts of interest, problems with previous projects, and/or liability issues. **\*Failure to include a complete, signed certification will disqualify the submittal.**

**2. Statement of Compliance with County Policies:**

The Developer must agree, should they be selected, to comply with all of the County's policies, including but not limited to, non-discrimination, insurance, and jury duty policies (see standard County Agreement, attached for reference as Exhibit L) and shall execute a statement of compliance certifying the same, included as **Attachment #10**, the Statement of Compliance & Certification Form. **\*Failure to include a complete, signed certification will disqualify the submittal.**

**3. Organizational Documents:**

Submit a current copy of the following documents. NOTE: If Proposer is a joint venture or partnership of multiple Developer entities, EACH Developer entity must submit the following:

- a. Certification Proposer is a viable entity (including formation documents, such as, if applicable, articles of incorporation, bylaws and/or partnership agreements, etc.).
- b. Certification of 501(c)(3) status from the Internal Revenue Service (if applicable, for any nonprofit corporations).
- c. Certification of 501(c)(3) status from the California Franchise Tax Board (if applicable, for any nonprofit 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).

**THIS IS THE END OF THE SUBMISSION REQUIREMENTS SECTION**

**ALL INFORMATION REQUESTED IN SECTION IV MUST BE SUBMITTED IN ORDER FOR A SUBMITTAL TO BE DEEMED COMPLETE. ALL ATTACHMENTS MAY BE DOWNLOADED FROM [WWW.PUBLICPURCHASE.COM](http://WWW.PUBLICPURCHASE.COM) AND FILLED OUT ELECTRONICALLY (BUT MUST BE SUBMITTED AS A PDF OR EXCEL DOCUMENT, ALONG WITH ALL OTHER PROPOSAL MATERIALS AS DESCRIBED ABOVE THROUGH [WWW.PUBLICPURCHASE.COM](http://WWW.PUBLICPURCHASE.COM).)**

## SECTION V: SELECTION PROCESS AND CRITERIA

### A. Selection Process

1. **Qualifying Threshold Requirements:** San Mateo County DOH staff will review all submittals for completeness, response to questions concerning potentially disqualifying issues, and satisfaction of minimum experience requirements. Proposers will be notified whether their submittal satisfied these qualifying threshold requirements. In cases where the submittal meets the minimum requirements but is defective because of typographical or minor calculation errors, the County may, in its sole discretion, allow a short grace period for the Proposer to correct such issues upon notification from the County, but serious deficiencies in submission completeness or accuracy may result in disqualification of the submittal.
2. DOH staff will contact references.
3. A selection panel appointed by the Director of DOH will review all submittals satisfying the qualifying threshold requirements. This screening will identify Proposals which, at the panel's sole discretion, best match the selection criteria and meet the development objectives program goals described herein. The County reserves the right to reject any or all submittals, to change or add to the selection criteria at any time during the screening process, and to change the preliminary schedule if appropriate.
4. After a review of all submittals satisfying the qualifying threshold requirements, Proposals will be ranked and assigned a numerical value based on how closely the submittal meets development objectives and program goals. The highest ranked Proposers will be invited for an interview, at which time the Proposer will be asked to present and explain their qualifications and the major characteristics of their proposal, particularly as these relate to the selection criteria, and respond to questions from the selection panel.
5. Interviews are tentatively scheduled to be held on the date(s) shown in Section III (Important Dates). These dates are subject to change. All Proposers selected for an interview should advise County staff of availability on these days. Interviews will be held at DOH's offices located at 264 Harbor Blvd, Bldg. A, Belmont, California.
6. Further information or written material regarding qualifications or submittals may be requested prior to or following interviews.
7. After completion of Proposer interviews, the selection panel will determine the final ranking of all qualifying Proposers, and present this ranking list and recommended finalist(s) to the Director of DOH. The recommendations of the panel will be based on evaluation of the Proposer submittals, interviews, and reference checks.

8. The selection panel's ranking of each qualified proposal will be final. No appeals of the rankings or recommendations made by the selection panel or the DOH Director will be accepted.
9. With the Executive Director's approval, the recommended Developer Team will be offered the opportunity to enter into an Exclusive Negotiation Agreement ("ENA") with the County, with the intention of subsequently executing a Development, Disposition Agreement ("DDA") and long-term ground lease for the Development Site.
10. The selected Proposer will have one week to submit a written letter accepting the offer to enter into an ENA.
11. Upon receipt of the letter of acceptance, the Director of DOH will begin preparations to present his recommendation to the Board of Supervisors.
12. It is the County's intent to have a complete ENA draft acceptable to both the County and the selected Developer to present to the Board of Supervisors along with the recommendation to sign the ENA and begin negotiating a DDA.
13. Upon Board approval, the ENA will be executed, and the County and the selected Developer will begin work on successfully completing the ENA milestones, leading to preparation and execution of a DDA and ground lease, and start of construction.

## **B. Evaluation Criteria**

The selection panel will evaluate qualifying responses to the RFP based on each respondent's relevant experience, qualifications, detailed concept proposal, financing assumptions, and overall contributions to meeting the goals for the Project. The evaluation process will consider the Proposer's written submittal, submittal presentation to the selection panel, references, and ability to comply with County policies and requirements.

The table below provides a summary of the factors that will be evaluated and scored in this RFP.

### **Summary of Evaluation Factors and Maximum Points Available**

<b><u>EVALUATION FACTORS</u></b>	<b><u>POSSIBLE POINTS</u></b>
<b>Proposed Development Concept</b>	<b>60</b>
Degree to which proposed development concept furthers the stated Project goals and objectives.	15
Financial Feasibility & Leverage of public funds.	12
Thoughtful and appropriate mix of resident populations, housing-related amenities, and community-serving facilities and/or uses.	10



Thoughtful strategies for site planning, conceptual design, and approach to the Childcare portion of the project	4
Thoughtful strategies for site planning, conceptual design, and approach to gather and evaluate input on other potential community-serving uses to best inform the ultimate scope of this portion of the project.	4
Thoughtful strategies and plan for multi-lingual community outreach.	2
Overall quality and effort reflected in the proposed development concept.	7
Proposed Services Plan including any Supportive Housing services for special needs populations.	6
<b>Developer Team Experience and Capacity</b>	<b>40</b>
Developer experience in successfully developing and owning high-quality affordable residential mixed-use projects <u>comparable</u> to the development proposed in this RFP.	10
Developer experience with government assisted affordable housing programs and ability to secure a variety of financing sources.	10
Property Manager experience and approach.	5
Resident Service Provider experience and approach.	5
Developer experience successfully developing and owning high-quality affordable and other residential and mixed-use developments, including, adhering to federal and state fair housing and monitoring requirements.	4
Developer workload and capacity to adequately staff the project.	3
Architect experience and capacity to adequately staff the project.	3
<b>Total Points</b>	<b>100</b>

## SECTION VI: GENERAL TERMS AND CONDITIONS

- Read all Instructions.** Please read the entire RFP and all enclosures before preparing your proposal.
- Proposal Includes the RFP.** This RFP constitutes part of each proposal and includes the explanation of the County/DOH's needs, which must be met.
- Proposal Costs.** Costs for developing proposals are entirely the responsibility of the Proposer and shall not be charged to the County or DOH or otherwise reimbursed.
- Proposal Becomes County Property.** The RFP and all materials submitted in response to this RFP will become the property of the County.

5. **Alteration of Terms and Clarifications.** No alteration or variation of the terms of this RFP is valid unless made or confirmed in writing by County/DOH. Likewise, oral understandings or agreements not incorporated into the final contract are not binding on the County or DOH.

If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the Proposer must immediately notify DOH of such error in writing and request modification or clarification of the document. If a Proposer fails to notify DOH of an error in the RFP prior to the date fixed for submission, the Proposer shall submit a response at his/her own risk, and if the Proposer enters into a contract, the Proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

Modifications or clarifications to the RFP will be posted to [www.publicpurchase.com](http://www.publicpurchase.com), without divulging the source of the request for same. No party that fails to receive notice has any basis for protest given that all clarifications will be available online. It is the obligation of all proposing parties to check [www.publicpurchase.com](http://www.publicpurchase.com) for updates regarding the RFP if they wish to be kept advised of clarifications prior to submitting a proposal.

6. **Withdrawal of Proposal.** Proposers may withdraw their proposals before or after the RFP submittal deadline by submitting a written request to the County.
7. **Questions Directed Only to the County.** Prospective Proposers shall refrain from contacting or directing any inquiries or requests for information or clarification regarding this RFP to anyone other than the County.

***Any questions regarding existing community-serving uses at the Fair Oaks Health Center, the Fair Oaks Community Center, the Redwood City Child Development Program, the Fair Oaks Adult Activity Center, the Fair Oaks Library and the County's Human Services Agency shall be submitted only through either [www.publicpurchase.com](http://www.publicpurchase.com) or the Proposers Information Conference. County will consult with staff of the organizations referenced above, as appropriate, and will post answers to all questions regarding existing community serving uses on [www.publicpurchase.com](http://www.publicpurchase.com).***

8. **Contact with the County, DOH or County Employees.** As of the issuance date of this RFP and continuing until the final date for submission of responses, all prospective Proposers are specifically directed not to hold meetings, conferences, or technical discussions with any County employee for purposes of responding to this RFP except as otherwise permitted by this RFP. Any prospective Proposer found to be acting in any way contrary to this directive may be disqualified from entering into any contract that may result from this RFP.

Prospective Proposers should submit questions or concerns about the process as outlined above. The prospective Proposer should not otherwise ask any County employee questions about the RFP or related issues, either orally or by written communication, unless invited to do so.

## **9. Public Inspection of Documents.**

### General Provisions Regarding Public Nature of Submissions

Government Code Section 6250 et. seq., the California Public Records Act (the "PRA"), defines a public record as any writing containing information relating to the conduct of the public's business prepared, owned, used, or retained by any state or local agency regardless of physical form or characteristics. The PRA provides that public records shall be disclosed upon request and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this RFP is a public record in its entirety. Also, all information submitted in response to this RFP is itself a public record without exception. Submission of any materials in response to this RFP constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the PRA without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

### Proposer's Rights regarding Confidentiality of Submissions

The County cannot represent or guarantee that any information submitted in response to the RFP will be confidential. If the County receives a request for any document submitted in response to this RFP, it will not assert any privileges that may exist on behalf of the person or business submitting the proposal. If a Proposer believes that a portion of its proposal is confidential and notifies the County of such in writing, the County may, as a courtesy, attempt to notify the Proposer of any request for the proposal. However, it would be the sole responsibility of that Proposer to assert any applicable privileges or reasons why the document should not be produced, and to obtain a court order prohibiting disclosure. The Proposer understands that the County is not responsible under any circumstances for any harm caused by production of a confidential submission, and by its submission expressly waives any such claim against the County.

### The County's Rights Regarding Confidentiality of Submissions

To the extent consistent with applicable provisions of the PRA and applicable case law interpreting those provisions, the County and/or its officers, agents and employees retain the discretion to release or to withhold disclosure of any information submitted in response to this RFP.

10. **Post Award Conditions.** A Proposer selected through this RFP process will receive a letter notifying the Proposer of such selection, and the Proposer shall confirm its interest in proceeding into the Exclusive Negotiations Agreement stage. After such confirmation, the County reserves the right to make a general announcement to the public and to the County and County of San Mateo ("County") boards, commissions and agencies regarding the results of the RFP selection process.

The winning Proposer will be expected to comply with the County's and the County's policies and procedures concerning Equal Benefits, Jury Duty, Insurance, and Indemnification upon entering into any future contract with the County. Please see Exhibit I, the standard County contract template, for reference purposes.

11. **Selection of Proposer(s).** The selection of a Proposer will be memorialized in the form of a "County Agreement with Independent Contractor" (see the sample template attached), authorized by a resolution of the County Board of Supervisors, and signed by both parties.

The County/DOH reserves the right to reject any or all proposals without penalty. Waiver by the County or DOH of an immaterial deviation in the proposal shall in no way modify the RFP documents or excuse the Proposer from full compliance with the specifications if the Proposer enters into a contract.

Once a Proposer is selected, the Agreement with that Proposer must still be negotiated and submitted to the San Mateo County Board of Supervisors for approval, and **there is no contractual agreement between the selected Proposer unless and until the Board of Supervisors approves and County signs the Agreement.** Selection of a proposal for negotiation of contract terms and eventual submission to County leadership by way of an Agreement does not constitute an offer, and Proposers acknowledge by submission of a proposal that no agreement is final unless and until approved by the Board of Supervisors.

12. **Equal Benefits.** With respect to the provision on employee benefits, Proposer must comply with the County Ordinance prohibiting discrimination in the provision of employee benefits between a full-time employee with a registered domestic partner and one with a spouse.
13. **Jury Duty.** The Proposer must comply with the County Ordinance requiring that the contractor have and adhere to a written policy that provides its full-time employees who live in San Mateo County with no fewer than five days of regular pay for actual jury service in San Mateo County. This policy may provide that employees deposit any fees received for such jury service with the contractor or that the contractor deducts from the employee's regular pay the fees received for jury service. If the Proposer has no employees that qualify for jury duty in San Mateo County, the Proposer may satisfy this requirement by providing DOH with written confirmation of the fact that (1) it has

no such employees and (2) its policy is to comply with the jury duty pay ordinance with respect to any future qualifying employees.

14. **Insurance.** The County/DOH has certain insurance requirements that must be met. Depending on the nature of the work being performed some of these requirements may not be applicable, or alternatively, additional requirements may need to be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the contractor must carry the statutory limit for workers' compensation insurance; if the contractor or its employees maintains a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and DOH, and their officers, agents, employees, and servants as additional insured on any such policies (except workers compensation).
15. **Incomplete Proposals May be Rejected.** If a Proposer fails to satisfy any of the requirements identified in this RFP, the Proposer may be considered, in the sole discretion of County, non-responsive and the proposal may be rejected.
16. **Reservation of Rights.** This RFP is not a commitment or contract of any kind. The County/DOH reserves the right to pursue any and/or all ideas generated by this RFP. The County/DOH reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interests of the County/DOH. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, the County/DOH assume no liability for any unintentional errors or omissions in this document.

The County/DOH reserves the right to waive or modify any requirements of this RFP when it determines that doing so is in the best interests of the County/DOH.

<b>EXHIBITS: (Posted on <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>)</b>
Exhibit A - San Mateo County Childcare and Preschool Facilities Task Force
Exhibit B - Final Redwood City Childcare Needs Assessment – 2015 and 2025 – Supply and Demand Analysis
Exhibit C - Corner Record for the Site
Exhibit D - Phase 1 Environmental Site Assessment Report
Exhibit E - Phase 2 Environmental Site Assessment Report
Exhibit F - Site Plan
Exhibit G - Existing Conditions Memo
Exhibit H - BKF Utilities Report

Exhibit I - EPS Memo on New Markets Tax Credits for Childcare and Community-Serving Uses
Exhibit J – Smith Memo on New Markets Tax Credits for Homeownership
Exhibit K - Parcel A Summary – Middlefield Junction Master Plan
Exhibit L - Standard County Agreement with Contractors
<b>ATTACHMENTS: (Posted on <a href="http://www.publicpurchase.com">www.publicpurchase.com</a>)</b>
#1 – RFP Submission Checklist
#2 – Proposer & Team Description
#3 – Comparable Projects Experience Form
#4 – Other Projects Experience Form
#5 – Developer Staffing Workload Form
#6 – Architect Staffing Workload Form
#7 – Property Management Experience Form
#8 – Resident Services Provider Experience Form
#9 – Disclosure Questions
#10 – Statement of Compliance / Certification Form