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**REQUEST FOR PROPOSALS  
For Development Of  
626-640-648 WALNUT STREET  
SAN CARLOS, CA**

Issue Date: July 21, 2025

**Proposals Must be Received by 4:00 p.m. on  
12. September , 2025**

Proposals will not be accepted after this date and time

Interested parties may submit a “Keep Informed Request”  
online at [www.opengov.com](http://www.opengov.com)

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

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## I. STATEMENT OF INTENT

The County of San Mateo (“County”) through its Department of Housing (“DOH”) is seeking qualified and experienced developer teams to submit a description of their qualifications together with a conceptual proposal to develop and operate housing affordable to low-, very low-, and extremely low-income households on a County-owned Property of approximately 26,500 square feet in size and located at 628, 640, and 648 Walnut Street in San Carlos, CA 94070 (Assessor’s Parcel Numbers 050-131-060, 050-131-070, and 050-131-080) (“Property”). The County acquired the Property in March 2024 with the intent of facilitating the provision of affordable housing on the Property. The Property is within a residential and commercial area in the City of San Carlos (“City”) and is comprised of three adjacent, vacant parcels).

This Request for Proposals (“RFP”) seeks the submission of proposals from any and all interested and qualified proposers (“Proposers”). The County seeks by way of this RFP to select a development team to that has the qualifications to implement their proposal in a manner that maximizes the quality of development while also maximizing value to the County, and, by extension, the residents 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, Proposer’s demonstrated competency and experience in delivering affordable, deed-restricted development projects of a similar scope and type and capacity of the Proposer’s personnel and financial resources.

The County expects to negotiate and sign a 99-year ground lease with the selected Developer and/or Owner in order to transfer control of the Property at the time the Developer and/or Owner achieves close of construction financing for a County-approved affordable housing project on the Property (the “Project”). Under the lease, the County will retain ownership of the land, and, unless specifically excepted, the selected Developer and/or Owner will own and maintain the improvements, manage the Project, and provide resident services.

The County intends that the Project will further the County’s public objective of facilitating the development of affordable housing to meet regional needs, and that all applicable County rights and privileges, including intergovernmental immunities, thereby attach to the Project. Without waiving any such rights or privileges, the County also intends that the selected Proposer will propose a Project that is eligible for ministerial approval under State housing laws, and that will utilize applicable City of San Carlos entitlement procedures.

**Note:** At the time the County and the selected Developer/Owner enter into an Exclusive Negotiating Agreement (ENA) for development of the Property, DOH intends to make available to the selected Developer/Owner initial predevelopment funding, through a predevelopment loan agreement, in an amount not to exceed \$ 250,000 for early predevelopment tasks related to development of an affordable housing project on the Property. As described later in this RFP, the selected Developer/Owner will also be able to compete for additional necessary local predevelopment/construction gap funding through the County’s Affordable Housing Fund annual NOFAs and federal funds NOFAs.

We anticipate the selected Developer/Owner will also discuss potential funding with the City of San Carlos for additional local gap funding

**II. IMPORTANT DATES**

EVENT	TARGET DATE
1. RFP Issued	July 21, 2025
2. Interested Parties May Submit a “Keep Informed” Request <i>(see Section V.A. for more information)</i>	Between July 21, 2025 and September 5, 2025
3. Virtual Pre-Submission Proposers Conference <i>(via Zoom or MS Teams)</i>	August 11, 2025
4. Deadline to Submit Written Questions and Requests for Additional Information	August 15, 2025
5. Final Posting of All Questions/Responses and Additional Information on <a href="http://www.OpenGov.com">www.OpenGov.com</a>	August 22, 2025
<b>6. Proposal Submissions Deadline – Proposals Must be Received by 4:00 p.m. on This Date</b>	September 12, 2025 by 4:00pm PDT
7. Notification to Proposers re: Meeting/ Not Meeting Submission/ Minimum Qualifications Requirements*	WEEK OF September 22, 2025
8. Deadline for Appeals of Completeness/ Minimum Qualifications Determinations*	September 30, 2025
9. Developer Team Interviews, if necessary*	WEEK OF October 20, 2025
10. Director of Dept of Housing Recommendation of Selected Proposal*	October 29, 2025
11. Notification to Non-Selected Proposers*	November 4, 2025
12. Board of Supervisors Approval of Selected Developer Team and Direction to enter into an Exclusive Negotiations Agreement (“ENA”)*	December 9, 2025

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

**III. AREA AND PROPERTY INFORMATION**

**A. Area**

The City of San Carlos (“City”) is located in the Bay Area approximately 23 miles south of San Francisco and approximately 25 miles north of San Jose. It encompasses an area of approximately 5.92 square miles and is bordered by the City of Belmont to the northwest, the San Francisco Bay to the northeast, the City of Redwood City to the southeast and the unincorporated San Mateo County to the southwest. According to San Carlos’ 2023-31 Housing Element, between 2010 and 2020 the population of San Carlos grew approximately 6 percent, from 28,406 to 30,145 residents. The Association of Bay Area Governments (ABAG) growth forecasts predict a steady increase in population through 2030, with ABAG estimating that San Carlos’ population will grow by 12.5 percent from 2020 to 2030. As of

2020, the racial/ethnic distribution of population in San Carlos was 75% White, 17% Asian/Pacific Islander, 11% Hispanic, 1.3% Black, and 4% other.

The median household income for San Carlos (\$169,694 in 2018) is higher than the County of San Mateo median household income (\$113,776). However, 8% of all households in San Carlos are Extremely Low Income, 8% are Very Low Income, and 11% are Low Income – for a total of 27% of all households who have incomes below the Moderate-Income threshold of 80% of AMI.

**B. Overview of the Property**



*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.*

**1. Property Description**

The Property that is the subject of this RFP is located within a residential and commercial area of San Carlos within San Mateo County. The Property is located at 626-640-648 Walnut Street and consists of three adjacent parcels: APNs 050-131-060 (0.25 ac), 050-131-070 (0.18 ac) and 050-131-080 (0.18 ac) for a total Property size of approximately 0.61 acres [see *Property location depicted below.*] The Property is owned by the County and is located on Walnut Street between San Carlos Avenue and Cherry Street in the heart of downtown San Carlos near City Hall.

The following information is from the City of San Carlos staff report for the Planning & Transportation Commission’s March 18, 2024 meeting.

DATE PREPARED March 12, 2024	APPLICATION NUMBER PLN2024-00033	APPLICANT County of San Mateo	PERMIT(S) N/A
SUMMARY OF REQUEST			
Determination of General Plan Conformity for the County of San Mateo Acquisition of 626, 640 and 642 Walnut Street. The acquisition is for the future development of deed-restricted affordable housing.			
ADDRESS	APN	LOT DESCRIPTION	GENERAL PLAN
626, 640 and 642 Walnut Street	050-131-060, 050- 131-070 and 050- 131-080	0.60 acres	Mixed Use- 75-100
LOCATION PREVIOUS USE ZONING DISTRICT 626, 640 and 642 Walnut Street Commercial MU-DC -100			
Aerial Map		Zoning map	

	
<p><b>SURROUNDING LAND USES</b></p> <p>North/South/East: Mixed Use West: Multi-family residential</p>	<p><b>SURROUNDING ZONING</b></p> <p>South: Mixed Use Downtown (MU-DC) North/East/West: Planned Development(P-D)</p>
<p><b>ENVIRONMENTAL DETERMINATION</b></p> <p>The determination of General Plan consistency is not considered a project and as such, is not subject to analysis under the California Environmental Quality Act (CEQA).</p>	
<p><b>RECOMMENDATION</b></p> <p>Adopt a Resolution confirming the findings of conformity with the San Carlos General Plan for the acquisition of the property located at 626, 640 and 642 Walnut Street in the City of San Carlos by the County of San Mateo for future development as affordable housing.</p>	

At present, the previous vacant existing improvements on the parcels as shown on the above aerial map have been demolished and the site is currently vacant.

**2. Neighborhood Amenities and Local Resources**

The Property is in a vibrant, transit-oriented location ideal for new affordable housing development. It is located 0.3 miles from the San Carlos Caltrain Station and within easy walking distance of numerous SamTrans bus lines, jobs, K-12 schools, grocery markets, and a host of other neighborhood services and amenities. The Property location provides access to some of the best-rated public schools in San Mateo County including Arundel Elementary School, Carlmont High School, and Central Middle School. The Property also sits within a “Highest Resource” area as shown by the 2025 Opportunity Area Maps posted by the California’s Tax Credit Allocation Committee (TCAC/HCD Opportunity Area Maps), potentially making it extremely competitive for low-income housing tax credits, tax-exempt bonds, and other state funding opportunities.

**3. City General Plan Conformity; Zoning; Housing Element Conformity**

As part of the City’s recent Housing Element update the land use designation for the Property was revised. The General Plan now designates the Property as Mixed Use 75-

100. This designation is described in the General Plan as permitting both commercial and multifamily residential uses at residential densities of 75-100 dwelling units per acre. Further, the subject Property is also located within the San Carlos Downtown Core area.

Prior to purchasing the Property, the County submitted an application requesting the City conduct a General Plan Conformity Review for possible acquisition of the Property. The City of San Carlos affirmed such conformity through a Planning and Transportation Commission resolution adopted on March 18, 2024, which stated the Property has a General Plan land use designation of Mixed Use 75-100 (du/ac). According to the City, the Property is also within the Mixed-Use Downtown Core (MU-DC-100) zoning district. This zoning designation allows up to 100 du/ac and a building height maximum of 50 feet.

The Property is further identified in the City's Housing Element as a housing inventory Property, noting that with the updated General Plan designation, any proposed project could be developed at a higher density than what had been anticipated for the Property by the previous owner of the Property, and that these additional units would contribute to the City's Regional Housing Needs Allocation (RHNA) goals. City staff further noted in the Planning & Transportation Commission's staff report that two Housing Element policies also provide additional support for the findings of conformity with the San Carlos General Plan, specifically: (a) *Goal HOU-3*: Assist in the development of new housing that is affordable at all income levels; and (b) *Policy HOU-3.5*: Income Distribution of Lower Income Affordable Housing: Encourage housing units affordable to extremely low, very low and low-income households, consistent with the identified regional housing need for San Carlos.

The site for the proposed project, while situated outside the proposed Downtown Specific Plan boundaries, is encompassed within the recently adopted Streetscape Master Plan by the San Carlos City Council, with a focus on enhancing pedestrian experiences, bicycle connectivity, and on-street parking on Walnut, Elm, and Cherry Streets, supplementing the core downtown improvements on the 600, 700, and 800 blocks of Laurel Street. Proposers are encouraged to review the Streetscape Master Plan and follow the Specific Plan project at <https://www.sancarlosdowntownplan.com/>.

#### **4. Property History**

According to the Final Phase 1 ESA from March 20, 2024, the Property was developed with improvements for almost 100 years, when the central portion of the Property was developed sometime prior to 1926 with a residential house and a shed. There are several portions of the Property with corresponding addresses: 640 Walnut Street was developed in 1940 as a 1-story 2-bedroom single family home and repositioned as a barber shop in around 1990; 648 Walnut Street was developed as a 2-story apartment building with 3 garages in the mid 1950s, and; 626 Walnut Street was developed as a 2-story commercial office over parking around 1978. These structures were demolished and abated in 2024 at the direction of the County of San Mateo.

The previous owner submitted a Planning application, design and grading plans, and tentative parcel map – all of which were approved by the City's Planning Commission in

2021. These project entitlement approvals were valid for a period of one (1) year, after which they would need to be renewed by the Planning Commission (they have expired).

In March of 2024 the County acquired the Property, which was being offered for sale, after determining that the Property provided an appropriate location for housing affordable to low-, very-low, and extremely low-income households. The County purchased the Property from Dragonfly Assets C-50, LLC, a Delaware limited liability company, for a purchase price of \$8 million. This purchase price was consistent with the appraised value of the Property.

Prior to purchasing the Property, the County completed its investigation and due diligence review, which included obtaining a Phase I ESA, appraisal, ALTA survey, title review, confirmation of General Plan conformity with the intended future use of the Property (deed-restricted affordable housing), and a Sea Level Rise Impact evaluation. The County also obtained previous asbestos-containing and lead-based paint materials surveys. *[see the List of Exhibits at the end of this RFP for a complete listing of the due diligence documents posted on OpenGov.]*

## **5. Property Environmental Conditions**

The March 2024 Final Phase 1 ESA mentioned above reported the following conclusions:

- No evidence of Recognized Environment Conditions (RECs) in connection with the Property or adjoining properties;
- No evidence of Controlled Recognized Environmental Conditions (CRECs) in connection with the Property;
- No evidence of Historical Recognized Environmental Conditions (HRECs) in connection with the Property;
- No evidence of Business Environmental Risks – no evidence of additional environmental concerns in connection with the Property.

Based on the findings in the ESA, the report's authors indicated that "no further investigation is recommended at this time."

The former Property owner commissioned two hazardous material reports in May of 2021: an asbestos survey, which indicated that the previous buildings located on the Property had some asbestos-containing materials in "good to damaged condition," and a limited lead-based paint inspection, which indicated that lead-based paint "was present on interior and exterior painted/coated components and surfaces of the subject Property." Given these reports, the County conducted the abatement and demolition of the existing improvements in accordance with applicable regulations regarding asbestos and lead-based paint.

A Sea Level Rise Impact evaluation was conducted in accordance with the 2019 San Mateo County Sea Level Rise Policy for County-Owned Assets that requires evaluation of sea level rise risk at least 50 years beyond the date of acquisition. Based on a review of inundation and erosion maps, the Property was found to be not vulnerable to 3.3 feet of sea level rise or to 6.6 feet of sea level rise and a 100-year storm event.

### **C. Federal, State, Regional & Local Considerations**

#### **1. Census Tract**

The FFIEC Geocoding/Mapping System that is used by the California Tax Credit Allocation Committee (“TCAC”) to locate census tracts shows the Property is located in Census Tract 6092.02.

<https://geomap.ffiec.gov/ffiecgeomap/>

#### **2. HUD SADDA**

According to HUDUser (HUD’s online data tool), the Property is not in an area designated by HUD as Small Area Difficult to Develop areas for 2025.

[https://www.huduser.gov/portal/sadda/sadda\\_qct.html](https://www.huduser.gov/portal/sadda/sadda_qct.html)

#### **3. Priority Development Area**

The Property is located within the City of San Carlos’s “Railroad Corridor” Priority Development Area (PDA), as shown on the Metropolitan Transportation Commission (MTC) website. The Property is further considered a “Transit-Rich PDA” because it is within ½ mile of a major rail (Caltrain) station.

<https://mtc.ca.gov/planning/land-use/priority-development-areas-pdas>

#### **4. CalEnviroScreen 4.0**

This online tool shows the Census Tract 6092.02 as ranked in the >20 - 30 percentile of cumulative pollution burdens in California communities by census tract.

[https://experience.arcgis.com/experience/11d2f52282a54ceebcac7428e6184203/page/CalEnviroScreen-4\\_0/](https://experience.arcgis.com/experience/11d2f52282a54ceebcac7428e6184203/page/CalEnviroScreen-4_0/)

#### **5. SB 535 Disadvantaged Communities (2022 Update)**

CalEPA now has the responsibility for identifying areas considered disadvantaged communities under SB 535. The 2022 update of the CalEPA map indicates the Property is not located in such disadvantaged community.

<https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities/>

#### **6. TCAC/HCD Opportunity Map**

The Property Census Tract is located in a High Resource” area, according to the 2025 TCAC/HCD Opportunity Map:

<https://belonging.berkeley.edu/2025-ctcachcd-affh-mapping-tool-nc>

#### **IV. DEVELOPMENT PROGRAM ELEMENTS AND ASSUMPTIONS**

The Project is expected to meet the following goals, objectives and requirements as described in this Section IV.

##### ***A. Project Objectives***

The Project has five primary objectives which align with DOH goals and policies:

1. Creating at least seventy-five (75) affordable rental apartment units for families with incomes of up to 80% of AMI, while maximizing to the degree feasible the number of larger-family units having 2 or more bedrooms and units serving Very Low-Income and Extremely Low-Income families;
2. Providing at least 15% of the total units for households with incomes up to Extremely Low-Income, and providing a minimum of an additional 5% of the restricted units that are subject to a preference for people experiencing homelessness, who are referred with a Tenant-Based Rental Subsidy, in line with County Affordable Housing Fund policy;
3. Providing a preference for at least 25% of the units for City and County employees, to the extent and in a manner consistent with state and federal housing laws;
4. Creating a project that incorporates high-quality design and amenities appropriate for the planned resident population(s) and that uses green building strategies and planning for sustainable operations; and
5. 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.

##### ***B. Housing Program Requirements***

1. Proposed Project must include **at least 75 units**.
2. Proposed Project must **maximize density and unit count** that may be built "as of right" using all available tools and in conjunction with the City of San Carlos Community Development Department.
  - Use streamlined ministerial approval processes and maximize density per as-of-right zoning. For example, AB423 may be used in conjunction with the Affordable Housing Density Program or the State Density Bonus Program;
  - Adjust unit sizes to serve the proposed target populations.

3. **100% of all units**, with the exception of any manager unit(s), must be **targeted to households earning at or below the 80% AMI** Low Income Housing Tax Credit (LIHTC) limits.
4. **At least 15% of all units** must be targeted to **Extremely Low-Income (ELI)** households earning at/below 30% of AMI.
5. **At least 5% of all units** (in addition to the 15% ELI units required above) must be targeted to **County Clients**, who are individuals or families experiencing homelessness referred by the County and who are currently receiving services from a County agency or a nonprofit service provider contracted by the County. These prospective tenants will be referred to the Project with tenant-based rental assistance such as Section 8 or Permanent Supportive Housing vouchers.
6. Project must provide **on-site resident services and services coordination** available to all tenants at the Project and, at a minimum, these services should be **funded at \$500 per unit per year**, based on the number of income/rent restricted units in the Project.
7. **At least 25% of all units** shall have a preference for **City and County employees**, to the extent and in a manner consistent with state and federal housing laws.
8. All income- and rent-restricted units must 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 Property to affordable housing and (potentially) community-serving uses, as described in this RFP.

### ***C. Property Planning, Massing and Design***

The County seeks a thoughtful, cost-effective conceptual design for the Project which adds additional critically-needed affordable housing and also considers the character of the surrounding neighborhood.

Designs must comply with all County codes and requirements and the latest California Building Codes. As is detailed further in Section VI.C (Submittal Requirements), 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 community engagement and discussions with potential funders. The County will place an emphasis on Proposer’s accompanying narrative descriptions of the factors that Proposer intends to consider in formulating full program and design proposals, if selected to develop the Property.

While the County is not identifying requirements for any particular design aesthetic or building typology, we expect the outcome will offer well-designed and cost-effective unit plans and attractive surroundings for the Project residents 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 through integrated design and technology. We also encourage the use of architectural and Property design strategies to

promote health and physical activity at the Project.

#### ***D. 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.

#### ***E. Financing Plan***

**1. Financing Assumptions:** It is requested that Proposals use the attached DOH underwriting assumptions for their financing plan and proforma (see Appendix A).

**2. 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, 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.

**3. Leverage:** The County will consider the degree to which Proposers propose to leverage the County land contribution and County funds with other viable sources. In addition to limiting the need for up-front County gap financing 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 various other state HCD funding programs among other sources of leverage.

As described in Section VI.C., Proposers will have the opportunity to describe in their Financing Narrative why they believe their cost profile is reasonable and why it will be feasible to secure their proposed funding sources.

**4. County Subsidies and 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 (HACSM) or DOH, including the Affordable Housing Fund (“AHF”) and federal funding NOFA (HOME, CDBG).

Proposers should not include any assumption that Section 8 Project-Based Vouchers (PBVs) will be available, as the HACSM is nearing its cap of such PBVs and the federal voucher landscape is in flux. Proposers may include a narrative discussion of potential differences in their program and budget plans were PBVs to become available to the Project before completion.

**5. Resident Services and Service Coordination:** Proposers must include the expected cost and proposed financing plan for resident services and service coordination in their pro forma.

#### ***F. Loan Terms and Eligible Uses of County Predevelopment Funds***

Any County predevelopment funds that may be awarded to the selected Developer subsequent to this RFP will require the Developer to execute a Predevelopment Loan Agreement, Promissory Note, and Deed of Trust in a form and subject to terms established by the County, and to comply with loan terms, underwriting policies and compliance monitoring requirements summarized in Appendix A.

Predevelopment funding awarded to the selected Developer subsequent to this RFP may be used to support a variety of pre-construction housing development activities for the production of new affordable rental family housing located on the Property, as more specifically delineated in a Predevelopment Loan Agreement. Examples of such uses might include:

- Pre-development project concept development (including architecture, engineering, and financial modeling)
- Architectural and engineering expenses
- Environmental assessments
- Appraisals
- Legal costs
- Other development-related consultant expenses

**Only costs incurred after a predevelopment loan is executed are eligible for reimbursement.** Project costs incurred prior to execution of such loan **will not** be reimbursed by the County.

#### ***G. Potential for Additional County Assistance***

In addition to the below-market rate provision of land and any initial predevelopment funding provided by the County, 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 spring and a NOFA for federal HOME and CDBG funds in the winter months.

Strategic priorities for these NOFAs are set each round. **For example**, in AHF 13.0, the most recent NOFA round that was released in June 2025, the County’s priorities relevant to this RFP included:

- Expand housing opportunities through construction of permanent affordable multi-family rental housing developments;
- 100% of the total residential dwelling units in a development (excluding the manager’s unit(s)) must have income and rent restrictions for households up to Low Income;
- Target AHF funds to developments which achieve a high percentage of Very Low- and Extremely Low-income affordable housing units;
- Increase the supply of permanent affordable housing for people experiencing homelessness and other vulnerable people;
- Create housing opportunities for public employees
- Create more housing within walking distance of services, amenities, and transit – particularly where doing so leverages Affordable Housing & Sustainable Communities (AHSC) funding

Should the Housing Authority of the County of San Mateo issue an RFP for its rental subsidy programs after a Project developer is selected, the Project would be able to compete for such assistance. However, as stated above, Proposals should not assume the availability of Section 8 project-based rental assistance.

### **Summary of Development Assumptions**

In addition to the development assumptions discussed above, Proposers are encouraged to review the Evaluation Criteria and Scoring (Section VII.B.) to understand how the Proposal will be scored. Further, the narratives called for in the “Vision” sub-section of Section VI.C. provide important indicators of the key information that will be used when evaluating each Proposal.

## **V. RFP PROCESS**

### ***A. Submitting a “Keep Informed” Request***

To receive notices when additional information and responses to questions have been posted on [www.opengov.com](http://www.opengov.com), **all interested parties are encouraged to submit a “Keep Informed Request”** form (see “Keep Informed Request” Attachment) to the RFP folder on [www.opengov.com](http://www.opengov.com) anytime between the RFP posting date and the Proposal submission deadline. DOH will notify those on the “keep informed” list-serve when new information – e.g., addenda, responses to questions, and other important updates – has been posted on the OpenGov portal.

### ***B. Addenda to RFP, Response to Questions, and Other Important Updates***

DOH will periodically post RFP addenda, responses to questions and other important updates on [www.opengov.com](http://www.opengov.com). Parties that have submitted a “Keep Informed Request” online will also be notified by email about any such updates. However, it is the responsibility of each

prospective Proposer to check [www.opengov.com](http://www.opengov.com) for changes and/or clarifications to the RFP prior to submitting a Proposal, and a Proposer's failure to do so will not provide a ground for protest.

### **C. Online Submission of Proposals and Other Communications**

All Proposers must use [www.opengov.com](http://www.opengov.com) to submit Proposals, questions and requests for clarification. 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.opengov.com](http://www.opengov.com).

#### **1. Submission of Proposals through OpenGov**

All Proposals in response to this RFP shall be submitted electronically through [www.opengov.com](http://www.opengov.com) before 4:00 p.m. PDT on the closing date listed on the cover page of this RFP. DOH will only accept online submissions of RFP proposals, and any revisions, corrections or clarifying information that are material to the submitted Proposal will not be accepted after the Submittal Deadline. The County will not be responsible for and may not accept late Proposals 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.opengov.com](http://www.opengov.com) system.

Proposals are to be submitted digitally (via [www.opengov.com](http://www.opengov.com)) in portable document format ("PDF"). However, **Proposers are also required to submit an unlocked Excel version of the financial proforma(s), in addition to the PDF format**, as further described in Section VI.C. (Submittal Requirements).

Prior to the Proposal submission deadline, Proposers may amend their submitted materials. If doing so, a Proposer should remove the incorrect or incomplete document and add the corrected document to avoid any confusion on the part of DOH staff or review panel.

#### **2. Instructions for Using OpenGov**

The RFP will be listed on the OpenGov website under the folder labeled **"County of San Mateo RFP for Walnut St - San Carlos."** If a party or Proposer encounters technical difficulties in using OpenGov, it is the person's or Proposer's responsibility to contact OpenGov by email [[support@opengov.com](mailto:support@opengov.com)]

All RFP Attachment forms, along with Appendices and Exhibits, are posted in the **"County of San Mateo RFP for Walnut St - San Carlos"** folder on OpenGov. Fillable Attachment forms must be downloaded, filled in, converted to PDF format, and uploaded as part of the Proposer's submission.

Other Attachment items that the Proposer is required to provide but that do not use fillable forms (e.g., narrative responses, contracts, organizational documents, etc.) must also be submitted in PDF format as part of the Proposer's submission.

***D. Proposals Due by the Submission Deadline***

All Proposals, including all required attachment forms and other submittal items, must be received by DOH by the stated date and time in order to be considered for selection. 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 unless doing so is deemed to be in the best interests of the County, as determined in the sole discretion of DOH.

***E. Virtual Pre-Submission Meeting***

A pre-submission conference will be hosted virtually on Zoom by DOH on **August 11<sup>th</sup>, 2025 at 10:00 AM**. The purpose of the meeting is to ensure that interested Proposers and their teams understand the minimum qualifications requirements and the selection process. Questions raised at the conference may be answered verbally at that time. If any substantive new information is provided in response to questions raised at the pre-submission conference or through other communications with DOH, DOH will issue a written addendum to this Request for Proposals with this new information to all parties that have submitted a “Keep Informed” request through the OpenGov portal for the RFP; this new information will also be posted on **www.opengov.org**. Attendance at the pre-submission conference is highly recommended but not mandatory.

Registration Link for Pre-submission conference:

[https://smcgov.zoom.us/webinar/register/WN\\_Oq-z6vvDR0m5SsDIIm-vlYQ](https://smcgov.zoom.us/webinar/register/WN_Oq-z6vvDR0m5SsDIIm-vlYQ)

***F. Questions and Requests for Information***

Prospective Proposers may submit written questions, request clarifications, or seek additional information about this RFP before the Proposal submission deadline as shown in Section II (Important Dates). With the exception of questions raised at the Pre-Submission Proposers Information Meeting, all questions or requests for clarification relating to this RFP must be submitted through **www.opengov.com**. All questions or requests for clarification must be received no later than 4:00 p.m. PDT on the date specified in this RFP.

DOH reserves the sole right to determine the timing and content of the response, if any, to all questions and requests for additional information. However, DOH will seek to respond within 2 business days, by email, to the party who submitted a question(s) online through **www.opengov.com**. If the question/response pertains only to the prospective Proposer who made the inquiry, DOH will not add it to the list of RFP Questions and Responses; however, should such information be deemed relevant to other prospective Proposers, DOH will add it to the list of RFP Questions & Responses and post this list periodically through [www.opengov.com](http://www.opengov.com). Prospective Proposers are encouraged to check back regularly on that site to see any updates that may have been posted. A final Questions and Responses will be

posted electronically for all prospective Proposers to review on [www.opengov.com](http://www.opengov.com) by the date specified in Section II in this RFP.

### **G. Other Information**

There will be no public opening of proposals.

All proposals shall be considered as submitted, although the County reserves the right to negotiate with the selected Proposer the specific development characteristics, financing, and other Project-related assumptions during the term of the Exclusive Negotiations Agreement (ENA) to be entered into by and between the County and the selected Developer.

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 DOH. The County reserves the right to evaluate the contents of Proposals submitted in response to this RFP and to select a contractor, if any.

Please refer to Section VIII (Agreements, Acknowledgments, and Certifications) for further information regarding the RFP process and post-RFP activities.

## **VI. DEVELOPER TEAM ELIGIBILITY; MINIMUM EXPERIENCE AND CAPACITY REQUIREMENTS; SUBMITTAL REQUIREMENTS**

### **A. Developer Team Eligibility**

A proposer ("Proposer") must submit their response to this RFP on behalf of a developer team ("Developer Team"), which is defined as a team comprised of the following: an eligible and qualified housing developer ("Developer"), eligible and qualified owner ("Owner"), eligible and qualified property management entity ("Property Manager"), and an eligible and qualified resident services provider entity ("Resident Services Provider") as further described below. See Section VI.B. below for minimum experience and capacity requirements for each member of the Developer Team.

1. **Developer:** Eligible developers include nonprofit and mission-driven for-profit developers, other non-profit sponsoring agencies, tax credit limited partnerships and limited liability companies, and joint ventures among any of these entities, and where the developer (or the identified lead developer in joint ventures) has a demonstrated track record of: (i) securing low-income housing tax credits and other sources of affordable housing financing; (ii) successfully developing and maintaining a portfolio of deed-restricted affordable multifamily rental complexes, at least one (1) of which is located in the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, and Santa Clara).
2. **Owner:** An eligible Owner is defined as a property owner entity having experience

owning, and providing long-term asset management of, deed-restricted rental housing for low-income communities, at least one (1) of which must be located in the nine-County Bay Area (as defined above).

3. **Property Manager**: An eligible 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, at least one (1) of which must be located in the nine-County Bay Area (as defined above).
4. **Resident Services Provider**: An eligible 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, at least one (1) of which must be located in the nine-County Bay Area (as defined above). The County assumes Project proposals that include a more significant number of units targeted to populations with special needs than this RFP requires will contract with a Resident Services Provider experienced in providing appropriate services to that population or will include plans to contract with an additional service provider with experience doing so (see Note below).

**Note:** *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. In general supportive services providers deliver comprehensive care with trained staff meeting higher standards and professional qualifications, focusing on health, mental health, and substance use, whereas general resident service coordinators offer community building, education, and life skills programs with standard qualifications, typically emphasizing community engagement and self-sufficiency.*

*Letters of Intent or Memoranda of Understanding from Resident Service Providers and Property Management entities that are separate entities from the Developer must be submitted with the Proposal.*

## **B. Developer Team Minimum Experience and Capacity Requirements**

### **Experience:**

Minimum experience must be demonstrated by identifying specific **Qualifying Projects** in which Development Team members have participated, as further described below. As further described in Section VI.C., the proposed Developer Team will submit **Forms 4a-4d - Qualifying Project Forms** to document how the Qualifying Project characteristics meet each of the experience categories below (Developer, Owner, Property Manager, Resident Services Provider.)

To demonstrate the minimum required Developer Team experience, each team will be requested to submit one Qualifying Project example for the Owner, Property Manager, and

Resident Services Manager, and two Qualifying Project examples for the Developer. When appropriate, Developer Teams may submit the same Qualifying Project as evidence of experience across multiple experience categories or may use different Qualifying Projects to demonstrate experience across categories. In all cases, no more than five (5) total Qualifying Projects should be submitted. **Qualifying Projects will not be scored; they are used to determine if the proposed Developer Team meets the minimum Developer Team experience required to develop the Property.**

For the Developer and Owner, a **Qualifying Project** must have all of the following characteristics:

- The project must be new construction.
- The project must include units for families (2+ bedrooms) and not be a senior housing development.
- The project must be an in-fill development with a similar building type as proposed for this RFP
- The project must be financed in part with Low-Income Housing Tax Credits.
- At least 1 of the 2 Qualifying Project examples must be located within the 9-County Bay Area (as defined above).

For the Property Management entity and Resident Services Provider, a **Qualifying Project** must have all of the following characteristics:

- The project must include units for families (2+ bedrooms) and not be a senior housing development.
- The project must be financed in part with Low-Income Housing Tax Credits.
- The project must be located within the 9-County Bay Area (as defined above).

***Minimum Developer Experience:***

The proposed Developer must have completed within the past ten years **at least two (2) Qualifying Projects, at least one of which must be located within the 9-County Bay Area** (as defined above). Additional Developer experience, while not required, is desirable and will be considered as part of the scored Evaluation Criteria, as detailed below. The definition of “completed” is having received Temporary Certificate of Occupancy by the date of the submission deadline of this RFP. For joint-venture development partners, the experience of either entity may suffice for the joint-venture partnership, and a Memorandum of Understanding between such joint-venture Development partners must be submitted with the Proposal.

Additionally, a Proposer can qualify for development experience by contracting with a development consultant for comprehensive project management services. Development management services should include financial packaging, selection of other consultants, selection of construction contractor and property management agent, oversight of architectural design, construction management, and consultation on major aspects of the development process. The contract for development services must be executed and currently in-place and submitted with the Proposal and must be acceptable to the County as determined in DOH’s sole discretion.

***Minimum Ownership Experience:***

The proposed Project Owner must have owned at least **one Qualifying Project located in the 9-County Bay Area** (as defined above) for at least five (5) years prior to the submission deadline of this RFP. For purposes of this requirement, the managing general partner of the tax credit partnership that intends to take ownership of the completed Project and to provide asset management for the Project is the proposed “Owner”. Additional ownership experience, while not required, is desirable and will be considered as part of the scored Evaluation Criteria, as detailed below.

If the Developer entity is not the same entity as the proposed Owner, DOH reserves the right to require that certain members of the Developer remain active in the ownership of the Project for whatever length of time DOH deems necessary to ensure operating and financial stability.

***Minimum Property Manager Experience:***

The proposed Property Manager for the Project must have provided property management for at least 36 months for at least **one Qualifying Project located in the 9-County Bay Area** (as defined above). Additional property management experience, while not required, is desirable and will be considered as part of the scored Evaluation Criteria, as detailed below. The Property Manager must demonstrate effective strategies for working with service providers to collaborate on housing stability of residents.

***Minimum Resident Services Provider Requirements:***

The proposed Resident Services Provider must have provided resident services for at least 36 months for a family project in at least **one Qualifying Project located in the 9-County Bay Area** (as defined above). Additional resident services provision experience, while not required, is desirable and will be part of the scored Evaluation Criteria, as detailed below. The proposed Resident Service Provider must demonstrate effective strategies for collaborating with property management on housing stability for residents. The proposed Resident Services Provider must have the infrastructure to supervise and train onsite staff and their supervisors.

**Note Regarding Experience:** For any Development Team member, the experience of key staff members may be substituted for the experience of the organization as a whole as long as the staff members’ experience in other firms was substantive and involved responsibilities similar to those that they are anticipated to perform during the proposed development of the Property. Any substitution should be clearly identified in **Attachment 4a-4d, Qualifying Project Forms**. The County reserves the right to reject any Proposal where the County determines in its sole discretion that the identified staff members’ past experience and anticipated responsibilities are not comparable.

**Capacity:**

The proposed **Developer and Owner** must demonstrate the financial and staffing capacity to successfully complete the Project and manage the asset over the long-term, as further described below.

***Financial Capacity:***

The proposed Developer (or guarantor where another entity is providing required guarantees) must demonstrate its ability to obtain competitive financing, as evidenced by submitting the latest (2) years of either signed federal income tax returns (including schedules or attachments, if any); or audited financial statements (with management letters, if any). As further described in Section VI (C) below, the proposed Developer will also be required to submit **Attachment 5 – Financing Terms for Developer’s Qualifying Project** documenting the equity pricing and debt terms for the Qualifying Project submitted under Minimum Developer Experience.

**Staffing Capacity:**

The proposed Developer must document its capacity to successfully plan, design, and develop the Project, throughout the period of development, either through staff with appropriate experience and capacity, contracted services, or collaboration with other organizations. As further described in Section VI (C) below, the proposed Developer will be required to submit a written narrative **no more than one page** to document the experience and capacity of key staff, their workloads, and the organizational structure for supporting staff. The proposed Developer must also submit **Attachment 6 – Projected Staffing Workload Form** to document the work assignments (existing or contemplated) associated with each staff person expected to work on the Project for Developer.

**Asset Management Capacity:**

The proposed Owner must document its capacity to successfully manage real estate assets in compliance with municipal regulatory agreements and restrictions. To document this, the proposed Owner will be required to submit a recent Real Estate Owned (REO) schedule, stating the number of projects and average number of units/project currently in Owner’s asset management portfolio, proposed Owner’s current asset management staffing (noting job titles), FTEs, and status of each position (filled/vacant), and proposed Owner’s organizational chart.

**C. SUBMITTAL REQUIREMENTS**

Proposers are to provide the following requested information in the order indicated in the Submittal Checklist. *Note: All required information below is indicated by a circle bullet point.*

Please create Section divider pages to identify the beginning of a new Section (the sections are indicated below and also highlighted in blue rows in the Checklist ). **For all narratives, use a Times New Roman font, 12 font size, with 1.07 line spacing and 1-inch margins.**

Sections

**General**

- **Attachment 1 - RFP Registration Form.** The Developer must fill out and include this registration form in the submittal so that DOH will have a primary point of contact for the Proposal submittal.
- **Attachment 2 – Submittal Checklist.** Check the boxes of all items that will be submitted under each Section, or indicate “N/A” if not applicable.

### ***Developer Team Members***

- **Attachment 3 - Developer Team Description** to document the name of each organization, names of the organization's Director (or equivalent position) and primary contact persons, and phone numbers and email addresses for each of the following:
  - Lead Developer, and Co-Developers (if applicable)
  - Development Consultant (if applicable)
  - Owner
  - Property Manager
  - Resident Services Provider

For each member of the Developer team, submit a current copy of the following:

- **3.a – Resumes**: submit resumes for all persons identified on Attachment 3, the Developer Team Description Form
- **3.b – Consultant Contract** (if applicable): if a Development consultant is part of the Development Team, submit consultant's contract for development services
- **3.c – Letters of Intent or Memoranda of Understanding** (if applicable): Letters of Intent or Memoranda of Understanding from resident services providers and property management entities that are not affiliated with the Developer

### ***Minimum Developer Team Experience***

**Attachments 4.a, 4.b, 4.c, and 4.d– Qualifying Project Forms**, to document how the Qualifying Project characteristics meet each of the experience categories below (developer, owner, property manager, service provider):

- **Minimum Developer Experience (Attachment 4.a)** – must submit 2 Qualifying Projects, at least 1 of which is in the nine-county Bay Area;
- **Minimum Ownership Experience (Attachment 4.b)** – must submit 1 Qualifying Project located in the 9-County Bay Area;
- **Minimum Property Management Experience (Attachment 4.c)** – must submit 1 Qualifying Project located in the 9-County Bay Area;
- **Minimum Resident Services Provision Experience (Attachment 4.d)** – must submit 1 Qualifying Project located in the 9-County Bay Area

To demonstrate the minimum required Developer Team experience, each team is requested to submit one Qualifying Project for each experience category, except for the Developer experience category (must submit two, at least one of which is in the nine-county Bay Area). When appropriate, teams may submit the same Qualifying Project as evidence of experience across multiple experience categories or may use different projects to demonstrate experience across categories. In all cases, no more than five (5) total Qualifying Projects should be submitted. [Note: Qualifying Projects will not be scored but are used to identify if the proposed Developer Team meets the minimum Development Team experience required to develop the

*Property.]*

- **4.e – Overall Team Experience Narrative:** In *no more than six (6) pages* of written narrative, describe how each member of the proposed Developer Team has the most relevant experience for the successful development of the Project. **Describe how the Developer Team has implemented lessons learned from past affordable housing experience.** Please note that Proposers are not limited to discussing the Qualifying Project(s).
- ***Developer:*** Describe the Developer’s track record successfully developing high- quality affordable housing, including supportive housing. Discuss the Developer’s experience completing housing development projects on time and on budget, obtaining competitive financing terms, using HCD soft debt, developing type V/I or III/I construction, developing for low-income households through outreach for similar projects. Describe the experience and capacity of current staff to take on a project of this type.
- ***Owner:*** Describe the Owner’s track record successfully owning housing financed with Low-Income Housing Tax Credits. Discuss the Owner’s experience owning affordable housing for low-income households and describe the Owner’s current asset management structure, staffing and portfolio, and its capacity for assuming asset management of an expanded portfolio once the development is complete. For purposes of this requirement, the managing general partner of the tax credit partnership that intends to take ownership of the completed project and to provide asset management for the project is the proposed “Owner”.
- ***Property Manager:*** Describe the Property Manager’s track record successfully managing high-quality affordable housing communities. Discuss the Property Manager’s experience providing management services for low-income households, including communities of color; experience achieving high rates of housing retention, implementing low barrier tenant selection policies, contributing to the long-term sustainability of the development, experience administering subsidies; and achieving cost efficiencies in operations.
- ***Resident Services Provider:*** Describe the Resident Services Provider’s track record delivering highly impactful services to residents in affordable and/or supportive housing developments. Discuss the Resident Services Provider(s)’ experience delivering services to low-income households, including communities of color; linking residents to the local safety net of services; working with property management to achieve high rates of housing retention; and supporting positive outcomes for residents around health, economic mobility, and housing stability. If the Resident Service Provider(s) have had any services contracts prematurely terminated in the last five years, include an explanation for each termination. Discuss strategies for eliminating barriers that prevent communities of color from accessing quality health care services, employment and educational opportunities.

### ***Minimum Developer Financial Capacity Requirements***

- **Attachment 5 – Financing Terms for Developer’s Qualifying Project in the 9-County Bay Area** to document the equity pricing and debt terms for the Qualifying Project submitted under Minimum Developer Experience.

[Note: Developer and Co-Developer (if any) will also need to provide additional financial and disclosure information – see “***Other Required Information***” below]

### ***Minimum Developer Staffing Requirements***

- **Attachment 6 – Projected Developer Staffing Workload Form**. Document the work assignments (existing or contemplated) associated with each key Developer staff person expected to work on the Project.
- **6.a – Key Developer Staff Experience Narrative**. Provide written narrative of ***no more than one (1) page*** to document the experience and capacity of key developer staff expected to work on the Project, their workloads, and the organizational structure for supporting staff.

### ***Minimum Owner Capacity Requirements***

- **7.a - Real Estate Owned (REO) schedule** -- Provide proposed Owner’s recent Real Estate Owned (REO) schedule, documenting the number of projects and average number of units/project currently in Owner’s asset management portfolio.
- **7.b - Proposed Owner’s current Asset Management staffing** – provide a chart noting job titles, FTEs, and status of each position (filled/vacant).
- **7.c - Proposed Owner’s organizational chart (if applicable)**. If the Developer is NOT the proposed owner, please indicate on a separate sheet what the proposed ownership structure will be and which entities (whether planned or already formed) will act as the Managing General Partners.

### ***Vision***

Provide the following materials including financial proforma, concept drawings, plans and written narratives describing the Developer Team’s vision for the successful development of the Project (*note: all narratives and other written descriptions must be in Times New Roman font, 12 font size, and 1-inch margins*):

- **8.a - Project Concept Narrative**: Submit a narrative of ***no more than three (3) pages*** describing:
  - the proposed development program, including the proposed populations and AMI range to be served; types and approximate square footages of uses; building type(s), unit counts and sizes; residential amenities; any community-serving uses (not required); 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 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;
- the strategy for including a preference for a portion of the Units targeted to City and County employees
- the estimated timeline for securing entitlements through the City of San Carlos, and also for securing all needed financing sources listed in the Project financial proforma

○ **8.b - Financing Narrative:**

Submit a narrative of ***no more than two (2) 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 IV. above.

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.

○ **8.c - Financial Proforma (provide in 2 formats):**

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 more than one potential financing scenarios are discussed in the Financing Narrative due to certain variables that may be encountered, Proposers may describe these potential variations in the narrative, or may (but are not required to) submit additional proformas or alternate tabs within one workbook.

***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 DOH underwriting assumptions listed in Appendix A when developing your Financial Proforma, although such assumptions are only for comparative purposes and may not represent the terms in a final development scenario:

○ **8.d - Resident Services Plan:**

Submit a resident services plan of ***no more than three (3) pages*** that includes the following information:

- Resident Services Provider’s overall philosophy and plan for providing services at a family development with a mix of incomes and ages, and with a minimum of 5% of units set aside for households experiencing homelessness and who are clients of County services. If the Resident 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. Describe how you coordinate with any Supportive Services provider.
- 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.

○ **8.e - Services Budget:**

Submit a Resident Services budget that is consistent with the Resident Service Provider’s proposed Services Plan above. Include, at a minimum, sources as well as uses.

○ **8.f - Community Outreach Plan:**

Submit a community outreach plan of ***no more than two (2) pages*** that describes the Proposer’s overall philosophy and strategy for informing and engaging the community during the development process. Describe whether community outreach will involve the use of any language(s) other than English. 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 associated with the Project.

○ **8.g - Marketing Plan:**

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

- Proposer's overall strategy for marketing the non-targeted affordable units proposed in the Project Concept 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).
- Specific outreach methods which have been most useful in engaging a diverse pool of potential residents.
- Specific methods for marketing to City and County employees for a portion of the units that have been preferenced for these populations, as well as any set-aside units targeted to supportive or special needs populations proposed in the Project Concept Narrative.
- A marketing budget line-item cost, appropriate for the work involved and consistent with the Financial Proforma and the Proposer's marketing plan.

○ **8.h - Site Plan and Massing Concept Narrative:**

Provide a narrative of *no more than two (2) 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 proposed Site Plan fits into the surrounding neighborhood; and the reasoning for the proposed density, unit count, building height and building typology. It should also include green building/sustainability goals and proposed methods of achieving them. 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 the narrative to aid in communicating these concepts, but are not required.

○ **8.i - Conceptual Site Plan and Massing Drawings:**

Provide pre-schematic level drawings in an 8.5 x 11-inch 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.

- Floor Plans:

Provide a ground floor plan and a typical floor plan

**OTHER REQUIRED INFORMATION**

○ **Attachment A - Disclosure Questions:**

Each Developer Entity (if more than one, as defined in Section (A) of Attachment #3 - Developer Team Description Form) shall complete and submit **Attachment A**, 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.**

○ **Attachment B - 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 B**, the Statement of Compliance & Certification Form. **\*Failure to include a complete, signed certification will disqualify the submittal.**

○ **Developer Organizational Documents:**

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

- a. Certification that Developer is an existing and duly established entity under applicable law (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. Certification of Good Standing from the California Secretary of State
- e. The latest two (2) years of both:

- (i) signed federal income tax returns (including schedules or attachments, if any); and
- (ii) audited financial statements (with management letters, if any).

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

**ALL INFORMATION REQUESTED IN SECTION VI MUST BE SUBMITTED IN ORDER FOR A SUBMITTAL TO BE DEEMED COMPLETE. ALL ATTACHMENTS MAY BE DOWNLOADED FROM [WWW.OPENGOV.COM](http://WWW.OPENGOV.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.OPENGOV.COM](http://WWW.OPENGOV.COM).)**

**VII. SELECTION PROCESS; EVALUATION CRITERIA AND SCORING**

**A. SELECTION PROCESS**

1. **DOH Staff Review of Submittals:** Following the deadline for submission of Proposals, DOH staff will review all submittals for completeness, response to questions concerning potentially disqualifying issues, and satisfaction of minimum experience and capacity (threshold) requirements. During the review of threshold requirements, DOH staff may contact Proposers to clarify information provided in the submittal. A contacted Proposer must submit a complete response within two business days, or the Proposal will be determined not to meet threshold requirements. Any responses, including revisions to the narratives or attachments, corrections, or clarifying information, must be submitted online to **www.opengov.com** and not emailed to DOH.

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.

All Proposers will be notified by email not later than September 16, 2025 whether their submittal has been deemed complete, and whether it also satisfied the qualifying threshold requirements.

2. **Appealing a Determination that Threshold Requirements Were Not Met:** The Applicant may appeal the determination that a Proposal was incomplete/non-responsive, relied on an ineligible project type, or otherwise did not meet a threshold requirement by submitting an appeal (with any materials supporting the appeal) in writing by email to [kzwick@smchousing.org](mailto:kzwick@smchousing.org) not later than 4 pm Pacific Daylight Time on September 19, 2025. This appeal is the only mechanism by which a Proposer may

make a material change to a Proposal after the Proposal Submittal Deadline. A Proposer will be notified of the outcome of the appeal (which outcome is within the sole discretion of DOH) before the start of the interviews process, currently scheduled for the week of September 29, 2025. If the appeal is successful in DOH's sole discretion, the Proposal will be competitively evaluated with other Proposals, using the evaluation and scoring criteria set forth in Section VII B. below. If the appeal does not successfully address the specific negative threshold findings from the initial staff review in DOH's sole discretion, the Proposer will be notified before the start of the interviews process, currently scheduled for the week of **September 29, 2025**, and the application will be terminated with no further appeal.

*Note: The following process applies to proposals deemed complete and which meet the qualifying threshold requirements:*

3. **Selection Panel:** A selection panel appointed by the Director of DOH and composed of persons with expertise in the areas of development, affordable housing financing, property management and resident services ("Selection Panel"), will review all submittals satisfying the qualifying threshold requirements. This screening will identify Proposals which, at the Selection Panel's sole discretion, best match the Evaluation Criteria and meet the development objectives program goals described herein. The County reserves the right to reject any or all submittals, to amend the RFP as provided for herein, and to change the preliminary schedule if appropriate.
4. **Ranking / Interviews:** After a review of all Proposals 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 based on the Evaluation Criteria. The top-ranked Proposers may be invited for an interview, at which time the Proposers will be asked to present and explain their qualifications and the major characteristics of their Proposal, particularly as these relate to the Evaluation Criteria, and respond to questions from the Selection Panel.
5. **Scheduling of Interviews:** Interviews are tentatively scheduled to be held on the date(s) shown in Section II (Important Dates). These dates are subject to change. All Proposers selected for an interview should advise County staff of their availability on these days. Interviews will be held at DOH's offices located at 264 Harbor Blvd, Bldg. A, Belmont, California.
6. **Requests for Further Information:** Further information or written material regarding qualifications or submittals may be requested prior to or following interviews.
7. **Recommendations for Selection:** 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 Selection

Panel’s scoring of each Proposal will be done by consensus and will be final. However, the recommendations of the Selection Panel will be based on a combination of evaluation of the Proposer’s Proposal and interviews (if any). The DOH Director will then select the finalist Developer Team that is to be recommended for approval to the County Board of Supervisors (“Board”).

8. **No Appeal of Recommendations:** 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. **Proposer Acceptance:** The selected Proposer will have one week to submit a written letter accepting the offer to proceed toward execution of an Exclusive Negotiation Agreement (“ENA”) with the County.
10. **Recommendation for Selection to Board of Supervisors:** Upon receipt of the letter of acceptance, the Director of DOH will begin preparations to present a recommendation to the Board for approval of the selected Developer Team and authorization for DOH to negotiate an Exclusive Negotiation Agreement (“ENA”) and an Initial Predevelopment Loan Agreement between the County and the Developer/Owner.
11. **Process Following Board Approval of Developer Team:** If Board approval is given, the selected Developer/Owner and the County will negotiate and execute the ENA and enter into an Initial Predevelopment Loan Agreement, with the intention of subsequently executing a Development, Disposition and Lease Agreement (“DDLA”), long-term ground lease for the Development Property, and Regulatory Agreement.

**B. EVALUATION CRITERIA AND SCORING**

All Proposals that meet the Minimum Experience and Capacity Requirements listed in Section VII.B. will be scored and ranked in accordance with the following Evaluation Criteria:

**Summary of Evaluation Criteria and Maximum Points Available**

<b><u>EVALUATION CRITERIA</u></b>	<b><u>POSSIBLE POINTS</u></b>
<b>VISION</b>	<b>60</b>
<b>Overall Project Concept:</b> Degree to which proposed development concept furthers the stated Project goals, objectives, and requirements including: <ul style="list-style-type: none"> <li>▪ Addresses Project goals, objectives, and Housing Program requirements as stated in Section IV;</li> <li>▪ Demonstrates a thoughtful approach to the proposed populations and AMI levels to be served;</li> </ul>	15

<ul style="list-style-type: none"> <li>▪ Proposes a site plan and design that also thoughtfully addresses neighborhood character and makes use of green, energy-efficient approaches;</li> <li>▪ Includes an approach to expeditiously securing entitlements, including use of any entitlement expediting such as AB423 or other streamlining processes</li> </ul>	
<p><b>Site Plan, Design and Cost-Effective Construction Approach:</b> Degree to which proposed development concept:</p> <ul style="list-style-type: none"> <li>▪ Demonstrates a thoughtful approach to site planning, conceptual design, and cost-effective construction methods;</li> <li>▪ Proposes a Project whose design, size, configuration, and resident amenities support DOH’s goal of maximizing unit yield in a cost-effective manner while also being appropriate to serve the proposed resident population(s);</li> </ul>	5
<p><b>Finance, Leveraging &amp; Cost Containment Approach:</b> Degree to which the Developer Team’s financing approach to the proposed development:</p> <ul style="list-style-type: none"> <li>▪ Adequately describes the financing approach to the Project;</li> <li>▪ Describes how Project is strategically positioned to successfully compete for State funding sources, including from the CA Debt Limit Allocation Committee and Department of Housing &amp; Community Development;</li> <li>▪ Includes the Team’s strategies for controlling development costs;</li> <li>▪ Includes strategies intended to minimize the County’s capital gap financing;</li> <li>▪ Describes any innovative (i.e. non-standard, routine or commonly used) direct or indirect cost-cutting strategies relevant to overall development, construction or operating expenses</li> </ul>	12
<p><b>Tenant Populations to be Served:</b> Degree to which plan:</p> <ul style="list-style-type: none"> <li>▪ Represents a thoughtful and appropriate mix of resident populations, housing-related amenities, and any community-serving uses (if any);</li> <li>▪ Maximizes up to 25% of the units for City and County employees and describes a strategy for successfully marketing the units to City and County employees</li> </ul>	7
<p><b>Resident Services Plan &amp; Budget:</b> Degree to which plan:</p> <ul style="list-style-type: none"> <li>▪ Describes the overall resident services philosophy;</li> <li>▪ Describes the plan for delivering an array of resident services;</li> <li>▪ Describes the plan for services coordination, including any Supportive Housing services for special needs populations;</li> <li>▪ Includes a resident services budget consistent with the proposed Services plan.</li> </ul>	8
<p><b>Community Outreach &amp; Engagement:</b> Degree to which Proposal:</p> <ul style="list-style-type: none"> <li>▪ Includes thoughtful strategies and plan for overall community outreach and engagement efforts;</li> </ul>	5

<ul style="list-style-type: none"> <li>▪ Includes a robust plan to seek out and engage community members from diverse populations, including any multi-lingual community outreach.</li> </ul>	
<p><b>Marketing Plan:</b> Degree to which Marketing plan:</p> <ul style="list-style-type: none"> <li>▪ Presents an overall strategy for marketing the non-preferenced affordable units;</li> <li>▪ Includes specific outreach methods to engage a diverse pool of potential residents;</li> <li>▪ Includes methods for marketing to City and County employees, as well as any proposed supportive housing populations;</li> <li>▪ Includes a line-item marketing budget appropriate for the work involved and consistent the Marketing plan.</li> </ul>	5
<p><b>Quality of Vision Concept:</b> Overall quality and effort reflected in the proposed development concept.</p>	3
<b>Sub-Total</b>	
<b>Developer Team Experience and Capacity</b>	<b>40</b>
<p><b>Developer experience with the following:</b></p> <ul style="list-style-type: none"> <li>▪ Completing projects on time and on budget;</li> <li>▪ Obtaining competitive financing terms;</li> <li>▪ Developing the proposed type of construction;</li> <li>▪ Developing housing for low-income households, as applicable to the proposed tenant population(s), <i>including experience in the 9-County Bay Area</i>;</li> <li>▪ Current staff capacity and experience to take on this project type</li> </ul>	12
<p><b>Owner:</b></p> <ul style="list-style-type: none"> <li>▪ Track record of successfully owning housing financed with Low-Income Housing Tax Credits, including in the nine-County Bay Area;</li> <li>▪ Experience owning affordable housing for low-income households, <i>including any in the 9-County Bay Area</i>;</li> <li>▪ Effectiveness of current asset management structure and staffing, given portfolio size;</li> <li>▪ Capacity for assuming asset management of an expanded portfolio once the development is complete</li> </ul>	8
<p><b>Property Manager:</b></p> <ul style="list-style-type: none"> <li>▪ Experience managing properties for a mix of low-income households, comparable to the proposed tenant population(s) of the Project, including properties with Supportive Housing units, <i>including any in the 9-County Bay Area</i>;</li> <li>▪ Experience achieving high rates of housing retention;</li> <li>▪ Ability to keep operating budgets within projected year-to-year budgets over time;</li> <li>▪ Track record of achieving cost efficiencies in operations</li> </ul>	10
<p><b>Resident Service Provider:</b></p> <ul style="list-style-type: none"> <li>▪ Experience providing access and delivering services to a mix of low-income households comparable to the proposed tenant</li> </ul>	10

population(s) of the Project, <i>including any in the 9-County Bay Area</i> ; <ul style="list-style-type: none"> <li>▪ Experience in linking residents to community safety net services;</li> <li>▪ Collaborates with property management to achieve high rates of housing retention;</li> <li>▪ Supports positive outcomes for residents around health and economic mobility;</li> <li>▪ Capacity to attract and retain adequate staffing to take on this project</li> </ul>	
<b>Sub-Total</b>	
<b>Total Points</b>	<b>100</b>

***Projects must receive at least 70 points to proceed through the selection process.***

**VIII: AGREEMENTS, ACKNOWLEDGMENTS, AND CERTIFICATIONS**

1. **Read all Instructions.** Please read the entire RFP and all enclosures before preparing your proposal.
2. **Proposal Responsive to the RFP.** This RFP includes the explanation of the County’s needs, and Proposals must respond to and meet those needs.
3. **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.
4. **Proposal Becomes County Property.** The RFP and all materials submitted in response to this RFP will become the property of the County upon submission.
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 DOH posted to [www.opengov.com](http://www.opengov.com). Likewise, oral understandings or agreements not incorporated into the final contract are not binding on the County.

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.opengov.com](http://www.opengov.com) without divulging the source of the request for same. Such posting shall constitute constructive notice to proposers and no party shall have any basis for protest based on a failure to review any such clarifications. It is the obligation of all proposing parties to check [www.opengov.com](http://www.opengov.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 DOH.
7. **Questions Directed Only to the County.** Prospective Proposers shall refrain from contacting or directing any inquiries or requests for information or clarification regarding the meaning, interpretation, or requirements of this RFP to anyone other than DOH.
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 Disclosure.**

Government Code Section 7920.00 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 this RFP and any contract that may arise 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, which may be subject to disclosure under the PRA. 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.

If the County receives a request for disclosure of any document submitted in response to this RFP, it will not assert any privileges that may exist on behalf of the Proposer or any member of the Development Team or any other person. 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 but shall have no obligation to attempt to notify the Proposer of any request for disclosure of the proposal. However, Proposer understands that it is 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 alleged harm caused by production of a confidential submission, and by its submission expressly waives any such claim against the County.

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 (“ENA”) 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 the winning Proposer is subject to confirmation by a resolution of the County Board of Supervisors authorizing DOH to negotiate an ENA with the selected Proposer.

The County 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 and requirements of any contract that results from this RFP.

Once a Proposer is selected, an ENA 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 ENA Agreement.** Selection of a proposal for negotiation of contract terms and eventual submission to County leadership by way of an ENA does not constitute an offer, and Proposers acknowledge by submission of a proposal that no agreement is final unless and until set forth in a contract approved by the Board of Supervisors and executed by the County.

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 same sex married spouse and an employee with an opposite sex married 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 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 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 its 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 Proposal may be considered, in the sole discretion of County, non-responsive and rejected.
16. **Reservation of Rights.** Proposer and each member of the Developer Team acknowledge and agree that the County's issuance of this RFP is not a commitment or contract of any kind, or a promise or an agreement to fund any specific Project or enter a specific contract. The County reserves the right at any time and from time to time, and for its own convenience, in its sole and absolute discretion, to do the following:
  - Modify, suspend, waive or terminate any aspect of this RFP.
  - Pursue any and/or all ideas generated by this RFP.
  - Reject any and all proposals and/or terminate the RFP process.
  - Waive any technical defect or informality in any Proposal or submittal procedure that does not affect or alter the Proposal's substantive provisions.
  - Request some or all Proposers to revise submittals.

- Waive any defects as to form or content of this RFP.
- Reject all proposals and reissue the RFP.
- Procure the desired proposals by a means other than this RFP or not proceed in procuring the proposals under this RFP.
- Negotiate and modify any terms of an agreement made pursuant to this RFP.

Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, the County assumes no liability for any unintentional errors or omissions in this document.

#### **17. Certifications**

By submitting a Proposal in response to this RFP, Proposer and each member of a Developer Team certify under penalty of perjury that:

- The submission is not the result of collusion with an DOH employee or San Mateo County official or any other activity that would tend to directly or indirectly influence the selection process.
- The Proposer and each member of the Developer Team is able or will be able to comply with all requirements of this RFP.
- The Proposer and each member of the Developer Team is aware of the provisions of Section 1090 et seq. and Section 87100 et seq. of the California Government Code relating to conflict of interest of public officers and employees and is unaware of any financial or economic interest of any County officer or employee relating to this solicitation.
- Neither the Proposer, nor any member of the Developer Team, nor any principals or named subcontractors are identified on the list of Federally debarred, suspended or other excluded parties located at <https://sam.gov/content/exclusions>.

LIST OF EXHIBITS, APPENDICES, AND ATTACHMENTS

<b>EXHIBITS: (Posted on <a href="http://www.opengov.com">www.opengov.com</a>)</b>
Exhibit A – Appraisal
Exhibit B - Purchase & Sale Agreement
Exhibit C – Acquisition - County resolution
Exhibit D - Final Phase 1 Environmental Site Assessment Report
Exhibit E - Updated Preliminary Title Report
Exhibit F - ALTA Survey
Exhibit G – County Certificate of Acceptance
Exhibit H – Recorded Grant Deed
Exhibit I - Quitclaim for Water Line Easement
Exhibit J – General Plan Conformity – Staff Report
Exhibit K – General Plan Conformity – City of San Carlos resolution
Exhibit L – Asbestos Survey Report
Exhibit M – Lead-Based Paint Survey Report
<b>APPENDICES: (Posted on <a href="http://www.opengov.com">www.opengov.com</a>)</b>
Appendix A - San Mateo County Department of Housing – Loan Terms, Regulatory Agreement, Underwriting policies and Compliance Monitoring
Appendix B – Form of RFP Submittal Checklist (for reference)
<b>FILLABLE ATTACHMENT FORMS: (Posted on <a href="http://www.opengov.com">www.opengov.com</a>)</b>
“Keep Informed” Request Form – <i>(return this form online PRIOR to posting your Submittal)</i>
#1 – RFP Registration Form
#2 – Submittal Checklist Form
#3 – Developer Team Description Form
#4a – Minimum Development Experience Form
#4b – Minimum Ownership Experience Form
#4c– Minimum Property Management Experience Form
#4d – Minimum Resident Services Provision Form
#5 – Financing Terms for Developer’s Qualifying Project Form
#6 – Projected Developer Staffing Workload Form
Attachment A – Disclosure Questions Form
Attachment B – Statement of Compliance with County Policies / Certification Form

END of RFP -