



# Walnut Street Request for Proposals Pre-Submission Webinar

DEPARTMENT OF HOUSING


August 11 2025



# Agenda

- ▶ Introductions
- ▶ Development Opportunity
  - County's Intent and Property Information
  - Development Program Elements and Funding
  - Developer Team Eligibility
- ▶ RFP Submission Process
  - Submittal Requirements
  - Selection Process
  - Evaluation Criteria and Scoring
  - Agreements and Acknowledgements
- ▶ Timeline and OpenGov Portal
- ▶ Questions

# Question and Answer Format



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Questions during the presentation will be accepted via the Question and Answer (Q&A) section on Zoom

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Once the presentation is completed, questions not answered in the Q&A section will be answered at this time

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After all the questions in the Q&A section have been addressed, additional questions may be asked via the raised hand function

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All questions in the Q&A section and asked at the end of the presentation will be posted on OpenGov



# Introductions

RAYMOND HODGES, DIRECTOR, DEPARTMENT OF HOUSING

KEVIN ZWICK, DEPUTY DIRECTOR, DEPARTMENT OF HOUSING



# Walnut Street Development Opportunity

# County Properties: 628, 640, 648 Walnut Street San Carlos (pg. 3)

**Development Overview:** Soliciting for a qualified developer team to propose plans for an affordable housing development

**Intent:** Aim to house low, very low, and extremely low-income households (80% AMI and below)

**ACREAGE:** 0.61 (Vacant)

**Selection Criteria:** Affordable housing expertise, financial capacity, and feasibility of proposed development

**Lease and Legal Framework:** 99-year ground lease transferring site control while retaining County land ownership



# Property Information (pg. 4-9)

**Location and size:** Located at 626-640-648 Walnut Street

- Three adjacent parcels for a total Property size of approximately 0.61 acres – site is currently vacant
- 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.

## Neighborhood Amenities:

- Proximity to San Carlos Caltrain Station and Samtrans bus lines – 0.3 miles
- "Highest Resource" area per the 2025 Opportunity Area Maps - accessible to diverse neighborhood services, top-rated schools, and employment opportunities

# Property Information (pg. 4-9)

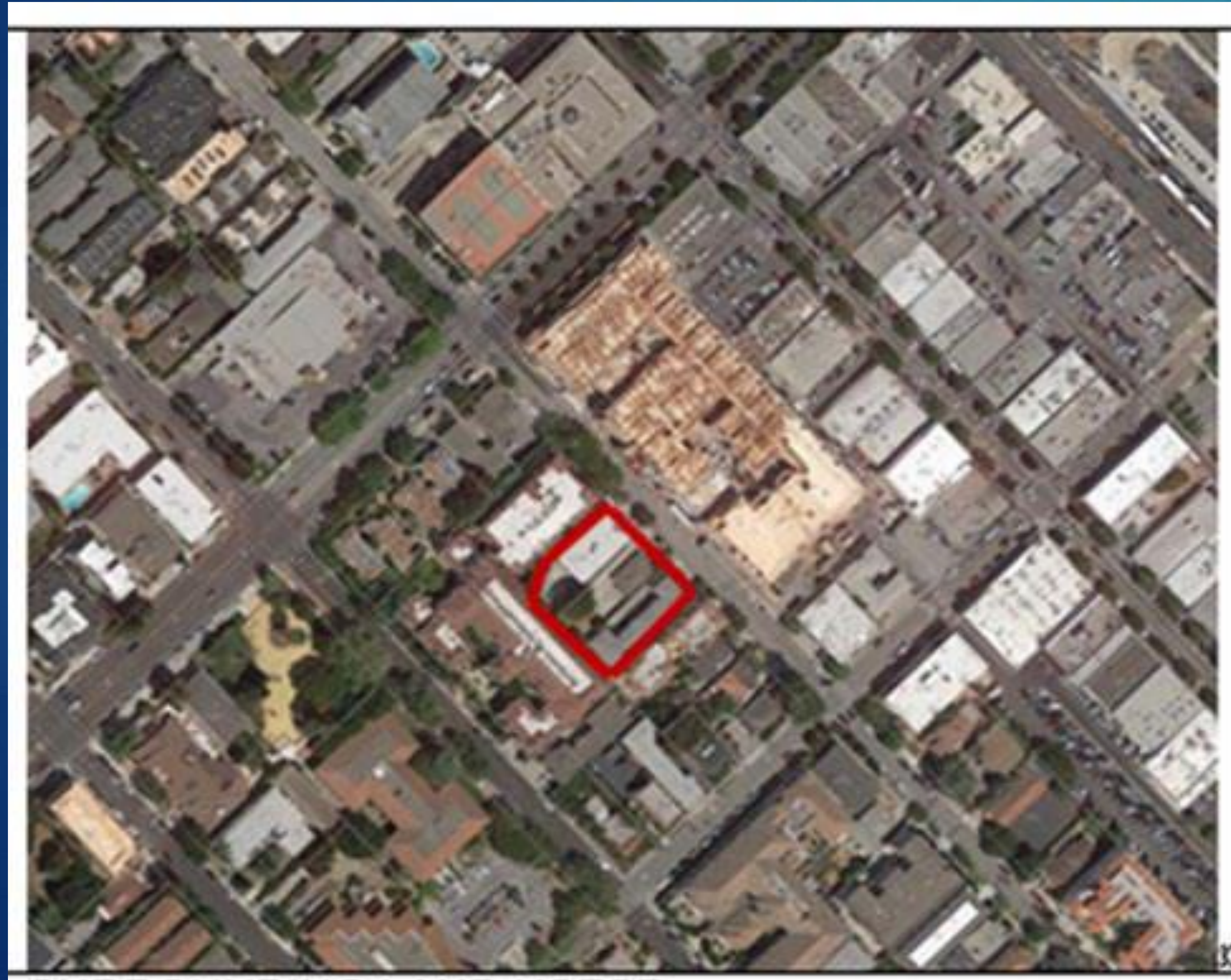
## ▶ Zoning and Housing Elements

- ▶ San Carlos General Plan Designation: Mixed Use 75-100, allowing both commercial and multifamily residential uses at densities up to 100 units per acre with a 50-foot height maximum in the Downtown Core.
  - ▶ Aligned with San Carlos Housing Element
- ▶ Site is tied into the Streetscape Master Plan, promoting enhanced pedestrian and transit infrastructure around downtown San Carlos.

## ▶ Federal, State, Regional & Local Considerations

- Qualified Census Tract (QCT): **Not** in a QCT
- Difficult to Develop Area (DDA): **Not** in an area designated as a Small Site DDA
- Priority Development Area (PDA): **Yes**. City of San Carlos' "Railroad Corridor" PDA
- SB 535 Disadvantaged Communities: **No**. Not located in disadvantaged community
- TCAC/HCD Opportunity Map: **Yes**. Located in a High Resource Area.

# Property Information



# Housing Program Elements (pg. 10-11)



100% of units for families at 80% AMI and below



At least 15% of units for households at 30% AMI



A minimum of an additional 5% of units for County Clients who are experiencing homelessness and are receiving services



At least 25% of units for County and City employees

# Funding (pg. 12-14)

## Finance Plans

Creative and Cost-Effective

- Must be realistic for costs and source

## NOFAs

Development can apply for DOH NOFAs

- Department of Housing – Affordable Housing Fund; Federal Funds (HOME, CDBC)

## Predevelopment Loan

Receive Predevelopment Loan

- \$250,000 for pre-construction housing development activities

## Section 8 PBVs

- Proposer should not assume Section 8 Project Based Vouchers will be available

## Local Housing Funds

- Developer/Owner will discuss potential funding with City of San Carlos

# Developer Team Eligibility (pg. 17-18)



# Developer Team Minimum Experience

(pg. 18-19)

- ▶ Each team will be requested to submit:
  - ▶ **One** Qualifying Development example for Owner, Property Manager, and Resident Services Manager, and;
  - ▶ **Two** Qualifying Development examples for the Developer (one of which needs to be in the 9-county Bay Area)
- ▶ **Developer and Owner:** the Qualifying Development must be new construction; include units for families (2+ bedrooms) and not be a senior housing development; an in-fill development with a similar building type as proposed for this RFP; and financed in part with Low-Income Housing Tax Credits. It must be completed and in possession of a TCO.
- ▶ **Property Management entity and Resident Services Provider:** a Qualifying Development must include units for families (2+ bedrooms) and not be a senior housing development; and financed in part with Low-Income Housing Tax Credits

# RFP Process

Keep Informed Request

Pre-Submission Meeting – August 11<sup>th</sup>

Questions and Clarifications – Must be submitted via OpenGov by August 15<sup>th</sup>

Addenda and Updates

Online Submission - Proposals and submissions must be submitted through OpenGov

Submission Deadline: Sept. 12, 2025 by 4:00 PM PDT

RFP  
Submission  
(pg. 14-17)

# Submittal Requirements (pg. 21-29)

## General

- Attachment 1 - RFP Registration Form
- Attachment 2 – Submittal Checklist

## Developer Team Members

- Attachment 3 – Developer Team Description, including resumes, consulting contract (if applicable), and LOI or MOUs (if applicable)

## Minimum Developer Team Experience

- Attachments 4a, 4b, 4c, 4d – Qualifying Development forms for each member of the developer team
- Attachment 4e – Overall Team Experience Narrative (no more than 6 pages)

# Submittal Requirements (pg. 21-29)

## Minimum Developer Financial Capacity Requirements

- Attachment 5 – Financing Terms for Qualifying Development (note: developers will need to provide additional organization financial info later in submittal)

## Minimum Developer staff Requirements

- Attachment 6 – Projected Developer Staffing Workload Form
- Attachment 6a – Key Developer Staff Experience Narratives (no more than 1 page)

## Minimum Owner Capacity Requirements

- Attachment 7a, 7b, 7c – REO Schedule, Asset Management Staffing chart, Owners organizational chart (if owner is not same as developer)

# Submittal Requirements (pg. 21-29)

## Vision

- Attachment 8a – Development Concept Narrative (no more than 3 pages)
- Attachment 8b – Financing Narrative (no more than 2 pages)
- Attachment 8c – Financial Proforma (in both PDF and unlocked Excel formats)
- Attachment 8d – Resident Services Plan
- Attachment 8e – Services Budget
- Attachment 8f – Community Outreach Plan
- Attachment 8g – Marketing Plan
- Attachment 8h – Site Plan and Massing Concept Narrative (no more than 2 pages)
- Attachment 8i – Conceptual Site Plan, Massing drawings, and floor plans

## Other Required Information

- Attachment A – Disclosure Questions
- Attachment B – Statement of Compliance with County Policies
- Developer Organizational Documents including:
  - Certifications of good standing
  - Latest 2 years of both signed federal income tax returns; AND audited financial statements

# Selection Process (pg. 29-31)



# Evaluation and Scoring (pg. 31-34)

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**Total points: 100**

**Vision: 60 points total**

Overall Development Concept	15 pts
Site Plan, Design, Construction Approach	5 pts
Finance, Leveraging, and Cost Containment Approach	12 pts
Tenant Populations to be served	7 pts
Resident Services Plan and Budget	8 pts
Community Outreach and Engagement	5 pts
Marketing Plan	5 pts
Quality of Vision Concept	3 pts

# Evaluation Criteria and Scoring Cont'd

## Developer Team Experience and Capacity: 40 points total

- Developer experience 12 pts
- Owner experience 8 pts
- Property Manager 10 pts
- Resident Service Provider 10 pts

Developments must receive at least 70 points to proceed through the selection process

# Agreements and Acknowledgements (pg. 34-38)

- ▶ **Proposal Costs** are entirely the responsibility of the Proposer
- ▶ **Contact with DOH or other County employees** – as of issuance date through the final date for submission, Proposers are specifically directed not to hold meetings, conferences or technical discussion with any County employee for the purpose of responding to this RFP. Can lead to disqualification.
- ▶ **Public Disclosure** - Be advised that this RFP, your proposal, and any contract that may arise from this RFP is a public record in its entirety.



# Timeline and OpenGov Portal

1. RFP Issued	July 21, 2025
2. Interested Parties May Submit a “Keep Informed” Request (see Section V.A. for more information)	Between July 21, 2025 and September 5, 2025
3. Virtual Pre-Submission Proposers Conference (via Zoom or MS Teams)	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

# Timeline and OpenGov Portal

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

# OpenGov (pg. 15)

- ▶ The RFP will be listed on the OpenGov website under the folder labeled “County of San Mateo RFP for Walnut St - San Carlos.”
- ▶ 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.
- ▶ All Submittal documents will be submitted via OpenGov
- ▶ All questions need to be submitted via OpenGov. Answers will be posted through OpenGov
- ▶ 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)]





Questions

Thank you!