DEPARTMENT OF HOUSING
264 Harbor Boulevard, Building A
Belmont, CA 94002
(650) 802-3300
www.smchousing.org
housing@smchousing.org

REQUEST FOR PROPOSALS
For Development Of
710 Hamilton St
Redwood City, CA

Issue Date: September 3, 2026

Proposals Must be Received by 4:00 p.m. on
6, November, 2026

Proposals will not be accepted after this date and time

Interested parties may submit a "Keep Informed Request" online at www.opengov.com

Proposals must be submitted electronically to 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 a mix of low-, moderate- and middle-income housing with a preference for employees of public agencies within the County of San Mateo, including County employees, on a County-owned Property of approximately 20,500 square feet in size and located at 710 Hamilton St, Redwood City, CA 94063 (Assessor's Parcel Number 052 364 110) ("Property"). The parcel is currently improved with a County-operated law library and is intended to be redeveloped for the provision of affordable housing with the foregoing local public employee preference. The Property is within a civic and commercial area in Redwood City ("City") and located on a corner lot.

This Request for Proposals ("RFP") seeks submissions from all interested and qualified proposers ("Proposers"). The County seeks by way of this RFP to select a development team 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 employees of the County. Proposers must be able to show that they and any proposed subcontractors can perform 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 long-term ground lease with the selected Developer/Owner to transfer control of the Property at the time the Developer/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/Owner will own and maintain the improvements and manage the Project.

To achieve the County's goals, expedite the development process, and secure a return on County investment, the County is prepared to contribute up to 80% of the total development costs to the project financing. The County expects all County financing to be repaid on a proposed time horizon with a return to the County, though alternate terms and structures for the County contribution will be considered assuming it meets other goals and objectives of this RFP.

The County intends that the Project will further the County's public objective of facilitating the development of affordable housing with a preference for public employees, and that applicable County rights and privileges, including intergovernmental immunities, may apply to the extent permitted by law. 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 Redwood City entitlement procedures.

Note: Subject to the approval of the County Board of Supervisors, 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.

II. IMPORTANT DATES

EVENT	TARGET DATE
1. RFP Issued	September 3, 2026
2. Interested Parties May Submit a "Keep Informed" Request *(see Section V.A. for more information)*	Between September 3 2026 and November 6, 2026
3. Virtual Pre-Submission Proposers Conference *(via Zoom or MS Teams)*	September 17, 2026
4. Deadline to Submit Written Questions and Requests for Additional Information	September 25, 2026
5. Final Posting of All Questions/Responses and Additional Information on www.OpenGov.com	October 2, 2026
6. Proposal Submissions Deadline – Proposals Must be Received by 4:00 p.m. on This Date	November 6, 2026 by 4:00pm PDT
7. Notification to Proposers re: Meeting/ Not Meeting Submission/ Minimum Qualifications Requirements*	WEEK OF November 16, 2026
8. Deadline for Appeals of Completeness/ Minimum Qualifications Determinations*	November 24, 2026
9. Developer Team Interviews, if necessary*	WEEK OF December 7, 2026
10. Director of Dept of Housing Recommendation of Selected Proposal*	December 16, 2026
11. Notification to Non-Selected Proposers*	December 21, 2026
12. Board of Supervisors Approval of Selected Developer Team and Direction to enter into an Exclusive Negotiations Agreement ("ENA")*	January 26 2027

**These dates/times are subject to change*

III. AREA AND EMPLOYEE HOUSING NEEDS

A. Area

Redwood City is located on the San Francisco peninsula in the Bay Area approximately 27 miles south of San Francisco and 24 miles northwest of San Jose. It is the third largest City in San Mateo County with 85,992 residents and encompasses 19 square miles of land area.

Redwood City is in the heart of Silicon Valley and is one of the most desirable and expensive residential real estate markets in the country as well as a regional job center across many industries. Like many Bay Area cities, Redwood City has seen substantial job growth over the years and new home construction has not kept up. The area is highly urbanized and highly developed with little vacant land available for development. Low- and middle-income workers are vulnerable to inflated housing costs and often subjected to extended commutes to more affordable areas. Since the County of San Mateo is the second largest employer in Redwood City making up 5% of workers or 2,452 employees, providing affordable housing opportunities for County and other public employees addresses the housing needs of a critical subset of low- and middle-income workers in Redwood City.

In response to the housing needs of its employees, the County employs a broad employee housing strategy. This includes a pilot program for preferences for County and other public employees for 25% of the apartments in developments funded out of the County's Affordable Housing Fund (AHF) NOFA to address the housing needs of employees earning up to 60% of the Area Median Income, as well as an Employee Down Payment Assistance program for those employees who are interested in and can afford costs of homeownership in the County. This development, and other future developments, serves as a bridge between these two strategies – primarily serving employees who earn above the traditional threshold for AHF-funded affordable rental housing, and those employees who can afford to purchase a home or can afford market rate rental housing.

The County also conducted an employee survey, focus groups and a series of case studies on comparable employee housing developments in the Bay Area to better understand the potential mix of apartment sizes and waitlist demand. (See Exhibit F – SMC Employee Housing Demant Study May 2026) The survey and focus group identified two-bedroom and three-bedroom units as those with the greatest appeal to County employees. From the analysis of other employee housing developments, although some of them include three-bedroom units, the highest demand was first for one-bedroom units, and second for two-bedroom units. The survey data coupled with demand results of the case studies, while taking into account the urban, in-fill context of the Property site, has informed the decision to focus on one and two-bedroom units for this particular development. Proposed future developments will address additional housing needs. Therefore, the County is seeking a Project with a unit mix that responds to the demand demonstrated in the informational meetings and across other comparable projects.

The County conducted informational meetings with County employees to solicit their feedback on what income and rent levels would be affordable to employees. It was determined that the target County employees who otherwise do not qualify for more deeply affordable housing available in the City have household incomes between 50%-140% of AMI. However, rents based upon traditional underwriting assumptions applied to the higher low, middle and moderate income tiers are still not considered affordable to those households who do have other limited options in typically older stock located more distant from employment, and who endure the high cost of other essential living expenses in the Bay Area. The County is seeking a Project that addresses both the income qualifications and rent affordability that allows county and local public employees to live closer to their jobs in Redwood City and surrounding areas.

B. Overview of the Property

The following overview is provided for informational and contextual 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, accounting, investment, or other professional advice.

1. Property Description

The Property that is the subject of this RFP is located within a civic and commercial area of Redwood City within San Mateo County. The Property is located at 710 Hamilton Street and consists of one parcel: APN 052 364 110 for a total Property size of approximately 20,500 square feet (0.47 acres) [*see Property location depicted below.*] The Property is owned by the County and is located on a corner lot fronting Hamilton Street, Marshall Street, and Winslow Street. Nearby uses include other government buildings, museums, and commercial establishments.

At present, the property is improved with the San Mateo County Law Library. All relocation and demolition activity, and costs of performing those activities, will be borne by the County.

Development Site Data:

Address: 710 Hamilton Street, Redwood City, CA 94063	**APN:** 052 364 110	**Site Area:** 20,000 square feet, 0.46 acres
Zoning: P-Planned Community - Downtown	**General Plan Land Use:** Mixed-Use Downtown	**Current Use:** Office Building – Low Rise

2. Neighborhood Amenities and Local Resources

710 Hamilton Street sits in the heart of Downtown Redwood City, one of the Peninsula's most walkable and amenity-rich neighborhoods. The area offers a true urban, live-work-play environment with easy access to restaurants, cafés, entertainment venues, and everyday services centered around Broadway, Courthouse Square, and the historic Fox Theatre. Residents can walk to the Caltrain station for convenient service to San Francisco and San Jose, while major corridors including El Camino Real, Highway 101, and Woodside Road provide strong regional connectivity. There are ample grocery options available, giving residents access to both specialty and everyday shopping. The neighborhood is served by schools within the Redwood City School District and Sequoia Union High School District, including Sequoia High School, a well-regarded local high school. Nearby parks, library facilities, community events, outdoor concerts, and seasonal festivals contribute to an active community atmosphere, making the area attractive to professionals, commuters, and households seeking a highly walkable downtown setting with strong transit access and abundant neighborhood amenities.

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

The Property has a General Plan land use designation of Mixed Use – Downtown which has no limit on residential density, floor area ratio (FAR) and limits height between 3-12 stories generally. The Property is zoned P–Planned Community – Downtown under the City of Redwood City's Zoning Ordinance and is subject to the City's Downtown Precise Plan ("DTPP"); Proposers are responsible for reviewing and addressing all applicable zoning, DTPP, design, development-standard, and entitlement requirements in their proposed development concepts.

The City is currently undertaking planning work to update the DTPP through its Downtown Growth Area Plan ("GDAP") process; Proposers should review the City's GDAP materials, available at https://rwcgreaterdowntown.com/ for contextual information regarding the City's evolving long-range vision for downtown, while recognizing that the applicable requirements for the Project will be determined through the City's entitlement process and any then-effective plans, ordinances, and regulations.

According to the 2010 Redwood City General Plan: Built Environment Element, the Property's land use designation is overlaying Redwood City's historic Downtown core with the intention of creating a vibrant mixed-use city center with daytime and nighttime uses, as well as high quality open and public spaces.

4. Property History

The Property is currently improved with a 10,900 square foot, partial two-story concrete and wood frame commercial building. The existing improvements were constructed in the 1950's as a bank branch, remodeled for library use, and are currently in average condition. The Property is in proximity to a historic courthouse constructed in 1910.

A copy of the Condition of Title Guarantee report from June 1, 2016 is included as an exhibit.

5. Property Environmental Conditions

The County has conducted a Phase I, appraisal, and other environmental studies which are included as exhibits to help inform proposals *[see the List of Exhibits at the end of this RFP for a complete listing of the due diligence documents posted on OpenGov]*.

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 6102.02.

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 2026.

https://www.huduser.gov/portal/sadda/sadda_qct.html

3. Priority Development Area

The Property is located within Redwood City's "Downtown" 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 6102.02 as ranked in the 76th percentile of cumulative pollution burdens in California communities by census tract.

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 located in a 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 "Low 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.

1. **Project Vision and Public Purpose**
   - Create a mixed-income housing development with a preference for public employees

within the County that helps fill the gap between conventional affordable housing, that the majority of public employees don't income qualify for, and newly constructed market-rate housing that they can't afford
- Encourage proposals that balance affordability, long-term operational sustainability, quality design, cost control measures, preservation of public control, efficient use of County funds, and repayment of County investment
- The County's long-term investment objective is preservation and return of capital and a modest long-term public return over an approximately 40-year time horizon

2. **Target Population and Employee Preferences**
   - Provide highest housing preference for employees of public agencies within the County of San Mateo, including County employees
   - Assume housing eligibility is tied to the resident's employment status with their local public sector employer, with reasonable transition periods if residents end their employment with the County or other local public sector entity

3. **Affordability and Rent Structure**
   - Provide a mix of rent levels aligned with demonstrated public employee housing needs
   - Establish rents based on actual cost to build, operate, maintain, and recapitalize the property over time, not necessarily tied to each household's specific income, while also achieving necessary returns on capital. The project will be subject to restrictions on rent escalations based primarily on the cost to operate and maintain the building, and pursuant to local and County ordinances and policies, in keeping with conventional affordable housing practices.
   - A suggested two-tier rent structure is offered below as an example of affordability and income level in alignment with County employee housing needs. One rent tier is set at a level affordable to households earning up to 50% AMI and a second rent tier set at a level affordable to households up to 80% AMI. Alternate approaches to the rent and income mix that meet other County goals, such as return on investment and market acceptance and demand, will be considered
   - Maximum household income levels may be restricted up to 140% AMI, but rents capped at or below 80% AMI is encouraged
   - Ensure rents remain materially (at least 25%) below comparable market-rate housing in downtown Redwood City

Rent Tier	Rent Level* (for example)	Household Income (for example)
Tier I	Up to 50% AMI Rent	Up to 80% AMI
Tier II	Up to 80% AMI Rent	Up to 140% AMI

*Reference 2026 San Mateo County Income Limits as determined by U.S. Housing and Urban Development (HUD).

4. **Development Program and Site Planning**
   - Deliver at least 70 housing units with a mix of one-, two-, and three-bedroom (optional) units informed by demand and feasibility
   - The County's employee demand study identified convenient parking as a key driver of

demand for the Project. Proposers should therefore plan for approximately one (1) parking space per dwelling unit, with a substantial portion of the required parking provided on the Property or otherwise incorporated into the Project design as feasible and keeping with urban downtown design and activation strategies. The County will consider proposals that provide a portion of the parking through nearby (i.e. within a 5-minute walk) leased or shared parking arrangements, provided that such spaces are secure, reliable, conveniently located, and available to Project residents on a long-term basis. While the County cannot at this time guarantee or commit to leasing parking spaces in County-controlled facilities; at its discretion, the County may coordinate with the selected Developer/Owner regarding potential nearby parking opportunities in County-owned or other nearby lots.

- Provide programmatic and economic benefit strategies that support tenants
- The County expects that the Project will be all-electric, utilize sustainable building methods and materials, and limit any pollution that may be caused by Project operations or the construction 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
- Proposers may consider and describe a conceptual closure, vacation, or other reconfiguration of the segment of Hamilton Street adjacent to the Property to improve the Project's site planning, open space, pedestrian safety, ground-floor activation, or overall urban design. Any such concept is preliminary only and would require separate review, coordination, environmental analysis as applicable, and all approvals required from the City of Redwood City and any other jurisdiction with authority; the County does not represent or guarantee that any street closure, vacation, or reconfiguration will be available or approved.

5. **Ownership and Long-Term Ground Lease**
   - County will retain ownership of the underlying land, with improvements privately owned and operated by the developer through a long-term ground lease
   - Propose an ownership, financing, and property management structure that preserves long-term County interests, employee access, and operational flexibility

6. **Financing Structure and County Participation**
   - The County is prepared to be the primary capital provider to fund the developer's construction of the Project, contributing up to 80% of total development cost in the form of a loan, secured by a deed of trust on the developer's leasehold interest and subject to an affordable housing regulatory agreement, to support affordability, lower costs, speed development and ensure future recycling of rent income into additional County housing investments. While the County's contributions for affordable housing development loans are typically repaid from residual receipts, with loan principal

accruing simple interest at 3%, and maturing 55 years from issuance of a certificate of occupancy, for this RFP the County expects to see developers propose alternative terms which will result in repayment on a shorter schedule with a modest return, and repayment alternatives, including payment ahead of residual receipts either through ground lease payments or loan repayments.
- Expectation of a developer equity contribution and, if necessary, an additional other gap financing capital sources to achieve financial feasibility
- Project should structure financing to eliminate or minimize reliance on permanent private debt supported by project operations
- Project should structure financing that does not rely on the use of Low-Income Housing Tax Credits (LIHTC) and eliminate or reduce the reliance on other public capital subsidies to achieve financial feasibility
- Project should structure financing assuming no more than 20% of County's total capital contribution would be distributed at or after construction closing on a draw basis, with the remainder 80% distributed at permanent closing to ensure County's objectives are met. Conventional construction period financing structures will be assumed to be included in developer proposals.

7. **Operations and Property Management**
   - The project will be privately owned and operated by the developer or owner and should not require ongoing operating subsidy from the County
   - The project should not require an ongoing operational role for the County, including the County's Human Resources Department
   - The Developer/Property Manager shall be exclusively responsible for management of the Project, including administration of the tenancies in the units
   - The project may include resident governance structures in line with social housing such as resident councils
8. **Urban Design and Civic Integration**
   - Ground-floor design should activate and positively contribute to the surrounding downtown environment and demonstrate an appropriate relationship to Courthouse Square and adjacent civic uses. Any ground floor parking structure and other use should be as thoughtfully designed as possible for the surrounding uses and contribute to the activation of the street.

9. 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, subject to approval of the County's Board, will require the Developer to execute a Predevelopment Loan Agreement, Promissory Note, and security instrument 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)
- Land use entitlement activities
- Architectural and engineering expenses
- Environmental assessments
- Appraisals
- Legal costs
- Other due diligence and/or development-related consultant expenses

Only approved 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.

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.B. 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**, **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 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.** 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** 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 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**.

1. **Submission of Proposals through OpenGov**

All Proposals in response to this RFP shall be submitted electronically through **www.opengov.com** before 4:00 p.m. PDT on the due 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** system.

Proposals are to be submitted digitally (via **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.B. (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 Law Library – Redwood City."* 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]

All RFP Attachment forms, along with Appendices and Exhibits, are posted in the *"County of San Mateo RFP for Law Library Redwood City"* 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 **September 17, 2026 at 10 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_KDD3IFRvRia-NAEQHrz4rw

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**. 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** 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 any 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: Experience, and Capacity Requirements

A proposer ("Proposer") must submit a response to this Request for Proposals (RFP) on behalf of a qualified Developer Team ("Developer Team"). The Developer Team must consist of the following entities:

- Developer
- Owner
- Property Manager

Each member of the Developer Team must satisfy the experience and capacity requirements described below. Compliance with these requirements shall be demonstrated through the submission of Qualifying Project Forms and supporting documentation as described in Section VI.B.

1. Developer

Eligible developers include nonprofit and mission-driven for-profit developers, limited partnerships, limited liability companies, and joint ventures among these entity types.

The proposed Developer (or, in the case of a joint venture, the lead Developer unless otherwise noted) must demonstrate the following minimum qualifications:

- The proposed Developer must have completed at least two (2) Qualifying Projects (as further described in Section VI(A)(4)) within the past ten (10) years, at least one (1) of which must be located within the nine-county Bay Area (San Mateo, San Francisco, Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, or Santa Clara

Counties). A project is considered completed upon issuance of a Temporary Certificate of Occupancy before the Proposal submission deadline.

- Preferred: Successful development, maintenance, and operation of deed-restricted multifamily rental housing developments completed in close collaboration with a public agency. The Developer must demonstrate experience satisfying the compliance requirements associated with such partnerships.
- Alternatively, the Developer may satisfy the minimum qualifications by demonstrating comparable experience developing multifamily employee rental housing or multifamily homeownership housing developments, subject to County review.

For joint-venture Developers, the experience of either entity may satisfy these requirements, provided that a Memorandum of Understanding between the joint-venture partners is submitted with the Proposal.

2. Owner

The proposed owner of the Project (Owner") must be an entity with experience owning and providing long-term asset management of deed-restricted, including mixed-income, rental housing.

The proposed Owner must have owned at least one (1) Qualifying Project located within the nine-county Bay Area for a minimum of five (5) years before the Proposal submission deadline.

If the proposed Developer and Owner are separate entities, the County reserves the right to require designated members of the Developer to remain involved in Project ownership for a period determined necessary to ensure operating and financial stability.

3. Property Manager

The proposed Property Manager must be a nonprofit or for-profit organization with demonstrated expertise providing ongoing property management services for income-restricted, including mixed-income, affordable housing developments.

The proposed Property Manager must have provided property management services for at least thirty-six (36) months for at least one (1) Qualifying Project located within the nine-county Bay Area.

4. Qualifying Project Requirements

Minimum experience shall be demonstrated through submission of specific Qualifying Projects. As described in Section VI.C, the Developer Team shall submit Forms 4a–4d (Qualifying Project Forms) documenting how each submitted project satisfies the applicable requirements for the Developer, Owner, and Property Manager.

The Developer Team shall submit:

- Two (2) Qualifying Projects for the Developer.
- One (1) Qualifying Project each for the Owner and Property Manager.

The same Qualifying Project may be used to satisfy multiple experience categories when applicable. No more than five (5) total Qualifying Projects may be submitted. Qualifying Projects are evaluated solely to determine whether the minimum qualifications have been met and are not scored.

For the Developer and Owner, each Qualifying Project must:

- Be new construction.
- Include family housing units (two or more bedrooms) and not be a senior housing development.
- Be an infill development with a building type similar to the Project contemplated under this RFP.
- Consist of deed-restricted, including mixed-income, housing or public-sector employee housing.
- Include at least one (1) Developer Qualifying Project located within the nine-county Bay Area.
- The Developer shall also submit Attachment 5, Financing Terms for Developer's Qualifying Project, documenting the financing structure of the Qualifying Project submitted to satisfy the minimum Developer experience requirement.

For the Property Manager, each Qualifying Project must:

- Include family housing units (two or more bedrooms) and not be a senior housing development.
- Consist of deed-restricted, including mixed-income, housing or public-sector employee housing.
- Be located within the nine-county Bay Area.

Additional experience beyond these minimum requirements is desirable and may be considered under the Evaluation Criteria described elsewhere in this RFP.

For any Developer Team member, the experience of key staff may be substituted for the experience of the organization if the staff's prior responsibilities were substantially similar to those anticipated for this Project. Any such substitution shall be clearly identified in Forms 4a–4d. The County reserves the right to determine whether proposed substitutions satisfy the minimum qualifications.

5. Capacity Requirements

The proposed Developer and Owner must demonstrate the financial, organizational, and staffing capacity necessary to successfully complete the Project and provide long-term asset management. Eligibility demonstrated by submitting documents listed in Section VI.B.

- **Financial Capacity:** The proposed Developer (or guarantor, if another entity will provide required guarantees) shall demonstrate the ability to obtain competitive financing and cover any portion of TDC that is not funded by the County and any project cost overruns.

- **Staffing Capacity:** The proposed Developer shall demonstrate sufficient staffing capacity to plan, design, and develop the Project through qualified employees, contracted professionals, and/or collaborating organizations.
- **Asset Management Capacity:** The proposed Owner shall demonstrate the capacity to manage real estate assets in compliance with applicable regulatory agreements and restrictions.

B. 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.**

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

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 property management entities that are not affiliated with the Developer

Minimum Developer Team Experience

Attachments 4.a, 4.b, 4.cQualifying Project Forms, to document how the Qualifying Project characteristics meet each of the experience categories below (developer, owner, property manager):

- **Minimum Developer Experience (Attachment 4.a)**
- **Minimum Owner Experience (Attachment 4.b**)
- **Minimum Property Management Experience (Attachment 4.c)**

- **4.e – Overall Team Experience Narrative**: In ***no more than three (3) 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 or mixed-income housing with high public and local government visibility. Discuss the Developer's experience completing housing development projects on time and on budget, obtaining competitive financing terms, ability and capacity to provide equity and/or other proposed financing sources, developing type V/I or III/I construction, developing for low-income households through outreach for similar projects. Include any experience with public sector employee housing. 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 deed-restricted, including mixed-income housing with high public and local government visibility. 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.

- *Property Manager:* Describe the Property Manager's track record successfully managing high-quality and high-visibility affordable and/or mixed-income deed-restricted housing communities. Discuss the Property Manager's experience providing management services for low and moderate income households reflective of the population of the local community; experience achieving high rates of housing retention, establishing and implementing tenant selection policies including initial lease-up and filling vacancies accordingly, contributing to the long-term sustainability of the development; and achieving cost efficiencies in operations.

Minimum Developer Financial Capacity Requirements

- **Attachment 5 – <u>Financing Terms for Developer's Qualifying Project in the 9-County Bay Area</u>**. Document applicable 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 – <u>Projected Developer Staffing Workload Form</u>**. Document the work assignments (existing or contemplated) associated with each key Developer staff person expected to work on the Project.
- **6.a – <u>Key Developer Staff Experience Narrative</u>**. 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 - <u>Real Estate Owned (REO) schedule</u>** -- Provide proposed Owner's current Real Estate Owned (REO) schedule, documenting the number of projects and average number of units/projects currently in Owner's asset management portfolio**.**
- **7.b - <u>Proposed Owner's current Asset Management staffing</u> –** Provide a chart noting job titles, FTEs, and status of each position (filled/vacant)**.**
- **7.c - <u>Proposed Owner's organizational chart</u>.** 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.

Project Concept

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 - <u>Project Concept Narrative:</u>** Submit a narrative of ***no more than three (3) pages*** describing:

  - The proposed development program, including 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; open space areas; parking ratios, numbers of parking spaces, and any off-site parking strategies (if applicable); 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;
- The strategy for lease up of units to County and other public employees including marketing, market-driven amenities, and ensuring sufficient demand for the apartments at initial lease-up and ongoing;
- A comprehensive project timeline including all major project milestones including, but not limited to: securing land use entitlements, financing commitments, construction finance close, construction start and completion, substantial completion, certificate of occupancy, lease-up and marketing, stabilized occupancy, and permanent financing close.

o **8.b - <u>Financing Narrative:</u>**

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

Describe in detail the proposed sources and uses, including any proposed alternative or additional terms of County capital contribution and compensation to the County including via any ground lease payments, residual receipts, hard loan payments and the rate of return on the County capital funds over a maximum 40-year term.

The County is open to various strategies for considering and addressing payments to the County ensuring a return on County investments, and expects each Proposer to clearly explain its proposal and reasoning in its application, including a discussion of why the Proposer is confident the proposed strategies for payments to the County will be achieved.

Provide detailed terms and assumptions for developer equity and/or any other forms of financing put forward by the Proposer. Describe how such source(s) relate to Proposer’s assumptions for the County’s capital contribution and a reasoned description of the Proposer’s ability to readily provide the assumed source(s).

The narrative should also describe any assumptions and calculations for welfare tax exemption and property taxes during operations.

o **8.c - <u>Financial Proforma (provide in 3 formats)</u>**:

Submit a project proforma in **both** <u>PDF</u> and <u>unlocked Microsoft Excel</u> formats using your own spreadsheets to demonstrate proposed project feasibility. At a minimum, the Financial Proforma should include the following information/tabs:

- Construction and permanent Sources and Uses: Clearly identify developer equity, County capital, permanent debt, grants, capital subsidies, and any other sources required for financial feasibility
- Itemized development budget
- Income and expense projections
- Operating budget
- Minimum 30-year cash flow projections (longer if required to demonstrate repayment of County capital contribution), including any ground lease payments, residual receipts, and loan payments to the County.
- Indicate County and Developer/Owner return on investment
- Proforma should provide clear calculation for any welfare tax exemption, and any justification for this calculation should be included in the *8.b Financing Narrative*.
- If applicable, a loan sizing worksheet (including debt coverage ratio, interest rate, etc.)

If multiple 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.

<u>In addition, Proposers must also fill out Attachment #7 – Financial Application Workbook</u>. This workbook will assist the review panel compare proposals submitted across all Proposers.

IMPORTANT NOTE: *Please note that the County is not seeking to make its selection of a Proposer solely based on the "lowest cost" submission. We are seeking efficient, cost-effective design, with realistic cost assumptions to achieve that design, and will evaluate proposals based on the Evaluation Criteria set forth in this RFP. To facilitate across-the-board comparisons between proposals, <u>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</u>:*

- **8.f - <u>Community Outreach Plan:</u>**

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. Include strategies for outreach to County employees for feedback on design standards, amenities, and any additional project features the development team considers important for end-user feedback.

- **8.g - <u>Marketing Plan</u>:**

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

  - Proposer's overall strategy for marketing to County and other public sector employees. 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).

  - The County will rely on the Developer/Owner to fully administer the residency preferences that apply to the Project, and the marketing plan must account for such responsibility.

  - Specific outreach methods which have been most useful in engaging a diverse pool of potential residents.

  - 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 - <u>Site Plan and Massing Concept Narrative</u>:**

  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** - **<u>Conceptual Site Plan and Massing Drawings</u>**:

  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):

  - <u>Site Plan</u>:

    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, a typical floor plan, and plan for any other floors that vary significantly from the typical floor plan.

- Unit Plan:

  Provide sample unit plans for each unit type, including furniture layout, labelling any storage space or other amenities, and indicating square footage.

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 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 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.)

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 requirements (collectively, "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 November 20, 2026 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 not later than 4 pm Pacific Daylight Time on November 24, 2026. This appeal is the only mechanism by which a Proposer may challenge the County's determination regarding a Proposal's satisfaction of threshold requirements. 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 December 7, 2026. 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 requirement 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 **December 7, 2026**, 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, and property management ('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") and provide notice to the Proposers of the recommended selection, subject to Board approval.

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 County's conditional selection, which shall be subject to Board approval.

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 a 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 a Predevelopment Loan Agreement, with the intention of subsequently entering into a Development and Disposition Agreement ("DDA"), long-term ground lease, and Regulatory Agreement, and such other agreements including loan agreements as may be authorized by the Board.

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

EVALUATION CRITERIA	**POSSIBLE POINTS**
VISION	**60**

Overall Project Concept: Degree to which proposed development concept furthers the stated Project goals, objectives, and requirements including: ▪ Addresses Project goals, objectives, and Housing Program requirements as stated in Section IV; ▪ Demonstrates a thoughtful approach to the proposed populations and AMI levels to be served; ▪ Proposes a site plan and design that also thoughtfully addresses neighborhood character and makes use of green, energy-efficient approaches; ▪ Includes an approach to expeditiously securing entitlements, including use of any entitlement streamlining.	15
Site Plan, Design and Cost-Effective Construction Approach: Degree to which proposed development concept: ▪ Demonstrates a thoughtful approach to site planning, conceptual design, and cost-effective construction methods; ▪ 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 residents.	5
Finance, Leveraging & Cost Containment Approach: Degree to which the Developer Team's financing approach to the proposed development: ▪ Adequately describes the financing approach to the Project; ▪ Presents a feasible financing approach that can be executed in the timeframe described; ▪ Presents a reasonable schedule that delivers units quickly; ▪ Includes the Team's strategies for controlling development costs; ▪ 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.	10
County Investment: Repayment, Return & Value: Degree to which plan: ▪ Includes strategies to efficiently maximize the impact of the County capital requested, to the extent feasible without compromising other goals; ▪ Describes clearly and provides favorable terms and repayment certainty for County's financial investment, consistent with the County's regular affordable housing financing terms, with any proposed alternative/additional terms	12
Resident Housing Needs: Degree to which plan: ▪ Represents a thoughtful and appropriate mix of unit sizes, housing-related amenities, and any proposed community-serving uses; ▪ Represents a thoughtful approach to meet the income levels and stated rent levels of the intended County and other public employees;	5

▪ Offers solution to maintain flexible and affordable rents levels as resident needs change over time; ▪ Presents a plan for community building resources, resident support, resident amenities and programs. Includes a budget for proposed services and amenities and source(s) of funding. ▪	
Community Outreach & Engagement: Degree to which Proposal: ▪ Includes thoughtful strategies and plan for overall community outreach and engagement efforts; ▪ Includes a robust plan to seek out and engage community members from diverse populations, including any multi-lingual community outreach.	5
Marketing Plan: Degree to which Marketing plan: **Lease-Up**: Degree to which Lease-Up Plan: ▪ Presents a clear plan for tenant selection ▪ Includes specific outreach methods to engage employees and support application processes ▪ Includes workshops and events to support employees in applying for housing ▪ Presents an overall strategy for marketing any non-preferenced affordable units; ▪ Includes specific outreach methods to engage a diverse pool of potential residents; ▪ Includes methods for marketing to County and other public sector employees, as well as any proposed supportive housing populations; ▪ Includes a line-item marketing budget appropriate for the work involved and consistent with the Marketing plan.	5
Quality of Vision Concept: Overall quality and effort reflected in the proposed development concept.	3
Sub-Total	
Developer Team Experience and Capacity	**40**
Developer experience with the following: ▪ Completing projects on time and on budget; ▪ Obtaining competitive financing terms; ▪ Developing the proposed type of construction; ▪ Developing income-restricted housing, *including experience in the 9-County Bay Area;* ▪ Developing public sector employee housing for a large group employer; ▪ Developing mixed-income housing; ▪ Developing deed-restricted housing in close collaboration with public agencies ▪ Current staff capacity and experience to take on this project type	12
Developer/Owner Financial Capacity:	10

▪ Evidence of ability to meet Developer/Owner equity contribution commitments;	
Owner: ▪ Track record of successfully owning income-restricted housing including in the nine-County Bay Area; ▪ Effectiveness of current asset management structure and staffing, given portfolio size; ▪ Capacity for assuming asset management of an expanded portfolio once the development is complete	8
Property Manager: ▪ Experience managing properties for a mix of low-income and moderate-income households, *including any in the 9-County Bay Area*; ▪ Demonstrated understanding of challenges and opportunities of managing public sector employee housing including lease-up and filling vacancies at resident turnover; ▪ Experience achieving high rates of housing retention; ▪ Ability to keep operating budgets within projected year-to-year budgets over time; ▪ Track record of achieving cost efficiencies in operations	10
Sub-Total	
Total Points	**100**

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. 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**. 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** 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 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 contracts with the County.

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 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 requiring compliance with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor's employee is of the same or opposite sex as the employee.

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, and which will be specified in any agreements entered into with the County. 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.

IX. LIST OF EXHIBITS, APPENDICES, AND ATTACHMENTS

EXHIBITS: (Posted on www.opengov.com)
Exhibit A – Appraisal
Exhibit B - Final Phase 1 Environmental Site Assessment Report
Exhibit C – Condition of Title Guarantee Report
Exhibit D - ALTA Survey
Exhibit E – Preliminary Geotechnical Report
Exhibit F – SMC Employee Housing Demand Study May 2026
APPENDICES: (Posted on www.opengov.com)
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)
FILLABLE ATTACHMENT FORMS: (Posted on www.opengov.com)
"Keep Informed" Request Form – *(return this form online PRIOR to posting your Submittal)*
#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
#5 – Financing Terms for Developer's Qualifying Project Form
#6 – Projected Developer Staffing Workload Form
#7 – Financial Application Workbook
Attachment A – Disclosure Questions Form
Attachment B – Statement of Compliance with County Policies / Certification Form

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- END of RFP -